



## **RIVER FOREST DIVERSITY, EQUITY, AND INCLUSION ADVISORY GROUP MEETING AGENDA**

You may submit your written public comments via email in advance of the meeting to: [tivansek@vrf.us](mailto:tivansek@vrf.us) A meeting of the River Forest Diversity, Equity and Inclusion Advisory Group will be held on Monday, April 17, 2023, at 7:00 P.M. Our location has been changed to Village Hall, 400 Park Avenue, River Forest, Illinois, in the Community Room located on the 1<sup>st</sup> floor. Anyone may listen to the meeting by participating in a Zoom conference call as follows: dial-in number: 312-626-6799 with meeting ID: 874 9000 2504 or by clicking the link here: <https://us02web.zoom.us/j/87490002504>

- I. Call to Order/Roll Call
- II. Approval of July 19, 2022, DEI Advisory Group Meeting Minutes.
- III. Approval of September 20, 2022, DEI Advisory Group Meeting Minutes.
- IV. Approval of March 6, 2023, DEI Advisory Group Meeting Minutes.
- V. Approval of March 21, 2023, DEI Advisory Group Meeting Minutes.
- VI. Advisory Board Chair Comment
- VII. Public Comment
- VIII. Unfinished Business
  - a. Continue to work in small group subcommittee breakout sessions.
- IX. New Business
  - a. Discuss timeline for each subcommittee to submit data requests.
  - b. Discuss timeline for each subcommittee to submit recommendations.
- X. Confirmation of Next Meeting Dates/ Meeting Schedule
  - a. Vote on meeting schedule
    - i. Monthly
    - ii. Bi-monthly
- XI. Adjournment

**DIVERSITY, EQUITY, AND INCLUSION ADVISORY GROUP MEETING MINUTES (NO QUORUM)**  
**July 19, 2022**

The River Forest Diversity, Equity, and Inclusion Advisory Group (DEIAG) meeting was held on Tuesday, July 19, 2022, from 7:00–9:00 P.M. in Room 107 in Parmer Hall at Dominican University, 7900 W. Division Street, River Forest, Illinois.

**I. CALL TO ORDER**

The meeting was called to order at 7:10 P.M. Upon roll call, the following persons were:

Present: Austin, Bachner, Bonner, Burkett, Credi, Duba-Clancy, Grant, Johnson, Johnson, Johnston, Kelly, Keskitalo, Kirk, Koopman, McAdams, McGinn, Murphy, Navarro, Oates, Plywacz, Rogers, Shea, Simon, Simon, Szerszenowicz-Olweny.

Absent: Arauz, Baird, Desorbo-Quinn, Foster, Graham, Hartshorn, Herrman, Humbert, Iverson, Kang, Khaledan, Kreisman, Nicholas, Oliver, Peavy, Macaulay, Petrov, Papirnik.

Also Present: Elijah Bebora, Management Analyst/Deputy Clerk

**II. APPROVAL OF THE JUNE 6, AND JUNE 21, 2022 DEI ADVISORY GROUP MEETING MINUTES**

Member Credi made a motion to approve the June 6 and June 21, 2022 Diversity, Equity and Inclusion Advisory Group minutes. Second by Member Johnson. On a voice vote, the motion was passed.

**III. PUBLIC COMMENT**

Chair Bachner stated a land acknowledgment  
Member Credi stated the pledge of allegiance

**IV. UNFINISHED BUSINESS**

None

**V. NEW BUSINESS**

a. General Discussion Regarding the Diversity, Equity, and Inclusion Request for Proposal

Chair Bachner, Johnson and Murphy presented the framework and different components of the Request for Proposal draft to the group. Chair Murphy asked the group if any elements were not included in the Request for Proposal that should be considered before the Request for Proposal is released to the public.

Member Grant stated that he wants to know whether the typical time for a request for proposal is one month. He also asked what the Village is doing to solicit proposals. He said in other instances with the Village, that there was one bidder, it seemed like the Village did not do enough solicitation for bids.

Chair Murphy stated that typically the timeframe to respond to a request for proposal is one month. Regarding ensuring that there will be multiple proposers to the request for proposal, Chair Murphy stated that there are several diversity, equity and inclusion vendors in the

Chicagoland area that can take a look at the request for proposal and we will be sending them the request for proposal directly. There are different organizations such as the Illinois Municipal League and the Illinois Assistant Municipal Managers Associations that the Village works with that have diversity equity and inclusion-related components to them that the Village can utilize.

John Grant stated that he would be more comfortable with the selection process if he could read some of the proposals that the Chairs receive and provide his feedback.

John Grant asked if the group would be able to read the proposals

Chair Murphy stated that he would talk to Village Attorney, Greg Smith.

**b. General Discussion on Scheduling and Next Steps**

Chair Murphy stated that the Request for Proposal would be published to various consultants on July 25, 2022. The deadline to submit the Request for Proposal will be August 19, 2022, at 4 pm. Consultant interviews will be scheduled for the week of September 9, 2022. A kickoff meeting with the chosen consultant and the entire group will tentatively take place at either the September 20, 2022 meeting or the October 3, 2022 meeting.

Chair Murphy stated that there would be a break from meetings for the rest of the summer and meetings will resume on September 20, 2022. Subcommittees are welcome to meet.

**VI. CONFIRMATION OF MEETING DATES**

The next meeting of the DEI Advisory Group is tentatively scheduled for September 20, 2022, at 7 P.M.

**VII. ADJOURNMENT**

Chair Murphy made a MOTION to adjourn the meeting at 8:12 pm. Second by Chair Johnson. On a voice vote, the motion was passed.

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Erika Bachner  
Chairperson

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Date

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Ken Johnson  
Chairperson

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Date

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Trish Ivansek  
Chairperson

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Date

**DIVERSITY, EQUITY, AND INCLUSION ADVISORY GROUP MEETING MINUTES (NO QUORUM)**  
**September 20, 2022**

The River Forest Diversity, Equity, and Inclusion Advisory Group (DEIAG) meeting was held on Tuesday, September 20, 2022, from 7:00–9:00 P.M. in Room 107 in Parmer Hall at Dominican University, 7900 W. Division Street, River Forest, Illinois.

**I. CALL TO ORDER**

The meeting was called to order at 7:10 P.M. Upon roll call, the following persons were:

Roll call did not occur due to a lack of quorum.

Also Present: Elijah Bebora, Management Analyst/Deputy Clerk

**II. APPROVAL OF THE JULY 19, 2022, DEI ADVISORY GROUP MEETING MINUTES**

A vote to approve the July 19, 2022, DEI Advisory Group minutes did not occur due to a lack of quorum.

**III. PUBLIC COMMENT**

Chair Bachner stated a land acknowledgment.

**IV. UNFINISHED BUSINESS**

None

**V. NEW BUSINESS**

a. General Discussion Regarding the Diversity, Equity, and Inclusion Request for Proposal Consultant Interviews and Selection Process

Chair Johnson stated that the Village received 16 proposals and the Chairs selected 7 firms to interview. After conducting the interviews, the Chairs unanimously selected Nova Collective LLC.

Becca Glodoski and Mario Lucero, Consultants at Nova Collective LLC. introduced themselves to the group and presented how they plan to work with the Village to fulfill the terms of the request of proposal. Becca Glodoski stated that the three core pillars of the Nova Collective are learning and development, research and data analysis, and strategy and consulting. They will gather information to get an assessment and baseline. She stated that Nova will start with a Staff and key stakeholder survey to gather qualitative and quantitative data. In conjunction, they will look at the policies and practices of the Village as an organization and make recommendations for improvement.

Member Navarro asked the Nova Collective consultants how they see themselves engaging with the group in the process.

Becca Glodoski responded that Nova views the DEI group as a key stakeholder.

The consultants were asked what their experience is working with other municipalities and what the challenges and successes were. Becca Glodoski responded that Nova Collective worked with the town of Jackson, Wyoming. Challenges they experienced with Jackson, Wyoming was working with a lot of different stakeholders and navigating through the different priorities within those stakeholder groups. Their successes were honing in on audiences to make initial changes that can broaden out and positively affect the community.

Chair Murphy stated that there will be contract negotiations and he anticipates that a proposed contract will be brought in front of the Village Board on October 10, 2022. He stated he anticipates that the stakeholder meeting will take place on October 18, 2022.

Member Credi stated that she would like the Village Board to know that the entire DEI group advocates for Nova Collective.

**VI. CONFIRMATION OF MEETING DATES**

The next meeting of the DEI Advisory Group is tentatively scheduled for October 18, 2022, at 7 P.M.

**VII. ADJOURNMENT**

The meeting adjourned at 8:00 PM

_____ Erika Bachner Chairperson	_____ Date
_____ Ken Johnson Chairperson	_____ Date
_____ Trish Ivansek Chairperson	_____ Date

**DIVERSITY, EQUITY, AND INCLUSION ADVISORY GROUP MEETING MINUTES (NO QUORUM)  
March 6, 2023**

The River Forest Diversity, Equity, and Inclusion Advisory Group (DEIAG) meeting was held on Monday, March 6, 2023, from 7:00–9:00 P.M. in the Community Room of River Forest Village Hall at 400 Park Avenue.

**I. CALL TO ORDER**

The meeting was called to order at 7:10 P.M. Upon roll call, the following persons were:

Present: Austin, Bachner, Bonner, Duba-Clancy, Herrman, Ivansek, Johnson, Johnson, Kelly, Keskitalo, Kirk, Koopman, Navarro, Oliver, Plywacz, Rogers, Shea

Absent: Arauz, Baird, Burkett, Credi, DeSorbo-Quinn, Graham, Grant, Hartshorn, Iverson, Johnston, Kang, Kreisman, Macaulay, McAdams, McGinn, Oates, Papirnik, Peavy, Petrov, Simon, Simon, Szerszenowicz-Olweny

Also Present: Luke Masella, Management Analyst/Deputy Clerk , Mathew Walsh, Interim Village Administrator

Not enough members were present at the meeting for a quorum.

**II. Approval of July 19, 2022, DEI Advisory Group Meeting Minutes.**

A vote to approve the July 19, 2022, DEI Advisory Group minutes did not occur due to a lack of quorum.

**III. Approval of September 20, 2022, DEI Advisory Group Meeting Minutes.**

A vote to approve the September 20, 2022, DEI Advisory Group minutes did not occur due to a lack of quorum.

**IV. Public Comment**

Chair Bachner stated a land acknowledgment.

**V. Unfinished Business**

None

**VI. New Business**

- a** Review new subcommittees.

The new Staff co-chair of the committee HR Manager Trish Ivansek introduced herself to the group as did the new Deputy Clerk/Management Analyst Luke Masella. Interim Village Administrator Walsh also introduced himself.

Trustee Bachner explained the changes to the new subcommittees and explained that hopefully this evening each subcommittee will develop an action plan for the next six months.

Trustee Johnson asked Manager Ivansek to give an update on the DEI Survey.

Manager Ivanssek gave an update on the status of the survey and stated that the survey results are expected to be presented to the committee in April.

Trustee Johnson explained that the restructuring of the subcommittees was to help refocus the groups to align with some of the work being completed by the DEI survey company.

Member Navarro reported that the committee he is apart of both needs direction and resources to continue their work.

Trustee Bachner stated that the staff present could help members gather the necessary materials and information.

**b** Discussion of next steps for each subcommittee

Trustee Bachner passed around a Smart Goal Action Plan worksheet for the groups to help guide them in creating their plans for the next sixth months.

The subcommittee Groups separated around the Community Room and began working on developing action plans amongst themselves.

**VII. Confirmation of Next Meeting Dates**

A discussion ensued around the next meeting dates for the meeting. The next meeting date was tentatively set for Tuesday, March 21<sup>st</sup>.

Trustee Johnson stressed the importance of getting resources request to staff sooner rather than later.

Trustee Bachner requested committee members regularly attend in person.

**VIII. ADJOURNMENT**

Trustee Bachner adjourned the meeting at 8:31pm.

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Erika Bachner  
Chairperson

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Date

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Ken Johnson  
Chairperson

Date

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Trish Ivansek  
Chairperson

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Date

DRAFT



**DIVERSITY, EQUITY, AND INCLUSION ADVISORY GROUP MEETING MINUTES (NO QUORUM)  
MARCH 21, 2023**

The River Forest Diversity, Equity, and Inclusion Advisory Group (DEIAG) meeting was held on Monday, March 21, 2023, from 7:00–9:00 P.M. in the Community Room of River Forest Village Hall at 400 Park Avenue.

**I. CALL TO ORDER**

The meeting was called to order at 7:10 P.M. Upon roll call, the following persons were:

Present: Austin, Bachner, Bonner, Credi, Herrman, Ivansek, Johnston, Kelly, Layney, Oates, Simon, Szerszenowicz-Olweny.

Absent: Arauz, Duba-Clancy, Iverson, Johnson, Johnson, Kekitalo, Khaledan, Kirk, Koopman, Macaulay, McAdams, Navarro, Oliver, Papirnik, Peavy, Petrov, Plywacz, Rogers, Shea, Simon.

Also present: Luke Masella, Management Analyst/Deputy Clerk.

Not enough members were present for a quorum.

**II. APPROVAL OF JULY 19, 2022, DEI ADVISORY GROUP MEETING MINUTES.**

A vote to approve minutes did not occur due to a lack of quorum.

**III. APPROVAL OF SEPTEMBER 20, 2022, DEI ADVISORY GROUP MEETING MINUTES.**

A vote to approve the minutes did not occur due to a lack of quorum.

**IV. APPROVAL OF MARCH 6, 2023, DEI ADVISORY GROUP MEETING MINUTES.**

A vote to approve the minutes did not occur due to a lack of quorum.

**V. PUBLIC COMMENT**

Chair Bachner stated a land acknowledgment.

**VI. UNFINISHED BUSINESS**

None

**VII. NEW BUSINESS**

Chair Ivansek explained the plans for the evening and asked the subcommittees to create 1-3 simple ideas for the group and staff to work on.

Committee Chris Johnston asked for a summary of the last meeting as he had missed it and it had been some time since the committee had met before then.

Chair Ivansek explained how the subcommittee goals will involve staff help.

Committee Member McGinn asked from the zoom chat if staff will reply upon receiving information/data requests from committee members.

Chair Ivansek reported yes and explained how that process will work.

At this point, the subcommittees broke off into their individual groups to work.

After 30 minutes, Chair Ivansek called the subcommittees back and each subcommittee provided a summary of the work completed so far and what their plans/needs are in the future.

Chairman Ivansek offered the 2<sup>nd</sup> floor conference room at Village Hall for subcommittees to utilize if needed.

Ms. Ivansek also asked the committee members to consider how often they would like to meet in the coming months.

Chair Ivansek reminded committee members to fill out Statement of Economic interest forms for the County.

**VIII. CONFIRMATION OF MEETING DATES**

Chair Ivansek explained that due to the April election and Village Board Meetings, the next DEI meeting will be April 17<sup>th</sup>.

**ADJOURNMENT**

The meeting ended at 8:30pm.

_____ Erika Bachner Chairperson	_____ Date
_____ Ken Johnson Chairperson	_____ Date
_____ Trish Ivansek Chairperson	_____ Date

## DEI Advisory Group Subcommittee Groupings

### Governance/DEI Framework – Liaison Ken

David Bonner  
Mindy Credi  
Abigail Rogers  
Megan Keskitalo  
Layne McGinn

### Housing – Liaison Erika

Kirk Johnson  
Kent Kirk  
Robert Navarro  
Mary Jane Oliver  
Jenny Kelly  
Renee Duba-Clancy

### Purchasing/Suppliers – Liaison Ken

Farzad Khaledan  
Sharon Oates  
Liz Simon  
Guillermo Arauz  
Chris Johnston

### Intergovernmental Relationships – Liaison Erika

Christina Papirnik  
Lisa Petrov  
Stacey Austin  
Whitney Simon  
Cindy Shea

### Community Outreach – Liaison Ken

Anja Herrman  
Rosey McAdams  
Dorota Szerszenowicz-Olweny  
Dionna Plywacz

The DEI Advisory Group has discussed how they will carry out the purpose, mission, goals, and responsibilities adopted by the Village Board of Trustees. Those discussions led to the development of seven main focus areas to create a subcommittee dedicated to each area. On January 18, 2022, the DEI Advisory Group revisited each focus area and identified the thoughts, ideas, goals, and objectives that came to mind under each area and the subcommittee's role in examining those areas. DEI Advisory Group members were also asked to consider where they might like to volunteer their efforts. For discussion, items that appear to require **data gathering and education have been highlighted in blue**, while items regarding **metrics have been highlighted in yellow**. Some items may not fit perfectly within a specific focus area, while others may have some overlap with other focus areas.

1. Purchasing/Suppliers	2. Housing	3. Community Outreach	4. Intergovernmental Relationships	5. Governance/DEI Review Framework
<i>Examining the vendors that provide services, vendor relationships, and opportunities for supplier diversity.</i>	<i>Examining housing inventory, access to housing across all groups including barriers to entry, and what it means to live in River Forest</i>	<i>Community education regarding the work of the Advisory Group, including two-way communication with the community; examines what it's like to live, shop, and work in River Forest.</i>	<i>Relationships with other agencies in and outside the Village, particularly those with DEI processes and initiatives; includes exploration of the Twin-Village Covenant with Maywood and connection with the Dominican University Truth, Racial Healing, and Transformation (TRHT) framework.</i>	<i>Governance and creation of a DEI review framework for matters before the Village.</i>
Identify who the Village uses as suppliers.	Demographic deep dive including characteristics of people living and multi- and single-family housing	Why do people come to River Forest to do business and/or start a business? Who do people come, or not come, to River Forest to do business (e.g., shop) and patronize businesses?	Relationships, including purchasing cooperation, with neighboring communities, including Maywood, Oak Park, Forest Park, Elmwood Park, and Berwyn	Ongoing review and advisory work of the DEI Advisory Group; how do we keep the changes alive?
Identify who is on the approved list of who can work in River Forest.	What are the barriers to obtaining housing in River Forest? What barriers exist for elders, minorities, etc., that could prevent more diverse occupancy in housing for River Forest (including, for example, dementia-friendly and older adult needs)?	What is it like to live in River Forest? Why do people want to live in River Forest? Why do they stay?	Outreach to other taxing bodies (e.g., school districts, park district, township, etc.) regarding their DEI initiatives and possible sharing of information and resources	It is the Village Board's responsibility to decide the role of the Advisory Group and whether the Advisory Group will exist Ad Hoc or in perpetuity.
Education regarding the Village procurement process, including where bids are posted, RFP/RFQ language used by the Village, reauthorization/extension of contracts and purchases, and contract length	Permit processes, zoning regulations (including the public hearing process and public input	Qualitative and quantitative data regarding service access and service users (e.g., who's going to the library, schools, parks); demographic deep dive. Clarify goals – who lives here? Who partakes in Village life?	County/Township/State roles and relationships (e.g., Township – taxes; County – mandates/ roles/ responsibilities)	The DEI Advisory Group can continue to act as an advisory body to the Village Board of Trustees.
What are the Village's expectations regarding the diversity initiatives of the suppliers' own businesses to enhance the Village's portfolio; DBE (minority & women-owned businesses)? Identify what vendors are doing to diversify and incentivize	Balance of commercial & residential development – areas designated as more suitable for commercial property, how are neighboring property owners engaged in the decision-making process? Understanding the public hearing process, how decisions are made, whether and how these decisions may displace people	What's it like for student-residents to study at the universities in River Forest?	Twin Village's Covenant with Maywood; what defines it. What is that partnership supposed to be? Is it something in name, or is it something tangible?	How will the work of the DEI Advisory Group be kept alive – what are the guardrails?
Identify the geographic locations of Village vendors	Metrics regarding the composition of housing stock and development; what's in the pipeline	Barriers to interaction on an individual and community level	Metrics	Clear definition and guiding principles of diversity, equity, and inclusion
Metrics	Education regarding the Village's Comprehensive Plan, what were the inputs into the plan, how recommendations were created regarding zoning and other topics	Police engagement	Gap assessment of services provided – what needs engagement?	Recommendation process/ framework for moving things through the pipeline
What kind of businesses are allowed in River Forest (zoning regulations re: permitted, special, and prohibited uses)?	Understanding what the tax base is in River Forest to support other housing options	Identify the DEI goals for this area – is the diversity of who lives here? Who owns property? Who partakes in Village life?	Role of schools – impact	
The scope should be limited to the Village as purchasers.	Impact of development on Village infrastructure; limitations created by utility impacts	Continue the partnership between the Village and Dominican University and connect the TRHT framework to the Village's DEI initiatives		
Expectations of disadvantaged business enterprises to enhance portfolio	Implementation and operationalization of the Village's Affordable Housing Plan	Sharing of resources and understanding of the DEI initiatives of other non-taxing body entities (e.g., houses of worship)		
	Deep dive into housing inventory and occupancy, what, if any, are the paths to entry and barriers	Identify other stakeholder groups and connect with them.		

1. Purchasing/Suppliers	2. Housing	3. Community Outreach	4. Intergovernmental Relationships	5. Governance/DEI Review Framework
<i>Examining the vendors that provide services, vendor relationships, and opportunities for supplier diversity.</i>	<i>Examining housing inventory, access to housing across all groups including barriers to entry, and what it means to live in River Forest</i>	<i>Community education regarding the work of the Advisory Group, including two-way communication with the community; examines what it's like to live, shop, and work in River Forest.</i>	<i>Relationships with other agencies in and outside the Village, particularly those with DEI processes and initiatives; includes exploration of the Twin-Village Covenant with Maywood and connection with the Dominican University Truth, Racial Healing, and Transformation (TRHT) framework.</i>	<i>Governance and creation of a DEI review framework for matters before the Village.</i>
	for entry for those that want to live in River Forest; what it means to live in River Forest (cost of services, utilities, taxes, permitting, zoning, etc.); include all marginalized groups			
	Education regarding alternative housing options (e.g., accessory dwelling units)	Education regarding the services provided by other entities; identify community needs and how resources can be met.		
	What is the strategy to achieve Village-wide comprehensive diversity? Is there a strategy?	Inclusivity outreach/community events		
	Education regarding development history	Examine red light cameras and police stops		
	Examine perceptions of how geographic location in the community determines how residents are treated and represented.	Outreach to new community members, bringing them into and welcoming them into the community		

# SMART Goal Worksheet

Name:

Date:

Goal in Mind

Add text

Is it Specific?

S

Add text

Is it Measureable?

M

Add text

Is it Attainable?

A

Add text

Is it Relevant?

R

Add text

Is it Timely?

T

Add text

SMART Goal

Add text

Task	Assigned to	Due Date

## **What is an Action Plan**

An action plan is a checklist for the steps or tasks you need to complete in order to achieve the goals you have set.

It's an essential part of the strategic planning process and helps with improving teamwork planning. Not only in project management, but action plans can be used by individuals to prepare a strategy to achieve their own personal goals as well.

Components of an action plan include

- A well-defined description of the goal to be achieved
- Tasks/ steps that need to be carried out to reach the goal
- People who will be in charge of carrying out each task
- When will these tasks be completed (deadlines and milestones)
- Resources needed to complete the tasks
- Measures to evaluate progress

What's great about having everything listed down on one location is that it makes it easier to track progress and effectively plan things out.

An action plan is not something set in stone. As your organization grows, and surrounding circumstances change, you will have to revisit and make adjustments to meet the latest needs.

## **Why You Need an Action Plan**

Planning helps you prepare for the obstacles ahead and keep you on track. And with an effective action plan, you can boost your productivity and keep yourself focused.

Here are some benefits of an action plan you should know;

- It gives you a clear direction. As an action plan highlights exactly what steps to be taken and when they should be completed, you will know exactly what you need to do.
- Having your goals written down and planned out in steps will give you a reason to stay motivated and committed throughout the project.
- With an action plan, you can track your progress toward your goal.



- Since you are listing down all the steps you need to complete in your action plan, it will help you prioritize your tasks based on effort and impact.

## **How to Write an Action Plan**

There are several important steps you need to follow with caution in order to get the best out of it. Here's how to write an action plan explained in 6 easy steps.

### **Step 1: Define your end goal**

If you are not clear about what you want to do and what you want to achieve, you are setting yourself up for failure.

Planning a new initiative? Start by defining where you are and where you want to be.

Solving a problem? Analyze the situation and explore possible solutions before prioritizing them.

Then write down your goal. And before you move on to the next step, run your goal through the SMART criteria. Or in other words, make sure that it is

- Specific – well-defined and clear
- Measurable – include measurable indicators to track progress
- Attainable – realistic and achievable within the resources, time, money, experience, etc. you have
- Relevant – align with your other goals
- Timely – has a finishing date

*Use this SMART goal worksheet to simplify this process. Share it with others to get their input as well.*

### **Step 2: List down the steps to be followed**

The goal is clear. What exactly should you do to realize it?

Create a rough template to list down all the tasks to be performed, due dates and people responsible.

It's important that you make sure that the entire team is involved in this process and has access to the document. This way everyone will be aware of their roles and responsibilities in the project.

Make sure that each task is clearly defined and is attainable. If you come across larger and more complex tasks, break them down to smaller ones that are easier to execute and manage.

### **Step 3: Prioritize tasks and add deadlines**

It's time to reorganize the list by prioritizing the tasks. Some steps, you may need to prioritize as they can be blocking other sub-steps.

Add deadlines, and make sure that they are realistic. Consult with the person responsible for carrying it out to understand his or her capacity before deciding on deadlines.

### **Step 4: Set milestones**

Milestones can be considered mini goals leading up to the main goal at the end. The advantage of adding milestones is that they give the team members to look forward to something and help them stay motivated even though the final due date is far away.

Start from the end goal and work your way back as you set milestones. Remember not to keep too little or too much time in between the milestone you set. It's a best practice to space milestones two weeks apart.

### **Step 5: Identify the resources needed**

Before you start your project, it's crucial to ensure that you have all the necessary resources at hand to complete the tasks. And if they are not currently available, you need to first make a plan to acquire them.

This should also include your budget. You can assign a column of your action plan to mark the cost of each task if there are any.

## **Step 6: Visualize your action plan**

The point of this step is to create something that everyone can understand at a glance and that can be shared with everyone.

Whether your action plan comes in the shape of a flowchart, Gantt chart, or table, make sure that it clearly communicates the elements we have identified so far – tasks, task owners, deadlines, resources, etc.

This document should be easily accessible to everyone and should be editable.

## **Step 7: Monitor, evaluate and update**

Allocate some time to evaluate the progress you've made with your team.

You can mark tasks that are completed as done on this final action plan, bringing attention to how you've progressed toward the goal.

This will also bring out the tasks that are pending or delayed, in which case you need to figure out why and find suitable solutions. And then update the action plan accordingly.