



# TEN STEPS TO CREATE A HEALTH & SAFETY ACTION PLAN

There are as many different approaches to creating strategic action plans as there are health and safety issues to plan for. This factsheet offers information to assist in developing workplace safety and health action plans. Ten essential elements included in a successful plan are:

## 1. Choose an Issue

Decide what health and safety problems or issues you and your members want addressed. Use the “Checklist for Choosing an Issue” factsheet to help identify and select an issue.

## 2. Gather Information

Decide what information you need concerning the problems or issues you want to address. Use the “Gathering Information” factsheet for suggested resources.

## 3. Determine the Solution

Decide what solution you want to achieve. This is the overall goal or objective that you are seeking to accomplish.

List your short-term goals or objectives that you could seek along the way to winning your overall goal.

## 4. Make Sure You Have SMART Goals

Evaluate your objectives to make sure they are SMART:

- **Specific:** *specify a key result to be accomplished*
- **Measurable:** *so you can know whether or not you have succeeded*
- **Assignable:** *specify who will do what*
- **Realistic:** *but still represents a change and a challenge*
- **Timely:** *specify any deadlines or amount of time needed to complete*

## 5. Establish an Action Plan

Plot a roadmap for achieving your long-term goal. Don’t forget to include a specific plan on achieving any short-term goals or objectives along the way. Use the Activity Handout “Strategic Planning to Improve Workplace Health & Safety” and the “Checklist for Evaluating Tactics”.

Elements of an action plan include:

- **What** – List all the different things that need to be done (e.g. gather information, communicate with/involve members).
- **When** – Develop a timetable with specific dates for achieving each task, and for the action plan as a whole. Make sure your timetables are reasonable!
- **Who** – Assign someone to be responsible for each particular task, including keeping a record of activities and reporting back on progress. Remember to involve rank-and-file members whenever and wherever possible.
- **How** – Identify resources that might be needed, and from whom or where resources could be obtained (resources include money, time, people materials, and etc.)

## 6. Identify Obstacles

Identify potential obstacles, and develop a specific action plan for preventing them. Also prepare for overcoming obstacles that cannot be prevented.

## 7. Identify Allies

Identify potential allies and develop a specific action plan for contacting and involving them. These allies could include AFL-CIO Area Labor Federations, Labor Councils, other unions or community groups.

## 8. Communicate with the Members!

Communicate with the members throughout the entire crisis/investigation. Let them know what the Union is doing. Broadcast victories along the way, and get feedback on any obstacles.

## 9. Meet, Review & Modify

Meet regularly to review progress and modify plans as needed. Members should be prepared to report on the status of each task.

## 10. Evaluate the Plan

At the end of the allotted time for your strategic plan, evaluate successes, strengths and weaknesses of the plan. Establish a system for long term follow-up to prevent future incidents. Incorporate what was learned into future strategic planning activities.

*Upon request, the PEF Health & Safety Department will provide factsheets, standards, regulations, and other resources. Contact us at 518-785-1900, ext. 254 or 1-800-342-4306, ext. 254. Also, visit our webpage at [www.pef.org](http://www.pef.org).*

**Produced by the New York State Public Employees Federation**  
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