



Action Plan

Name: _____

Time Period: _____

Objectives (List of Goals)	Tasks (What you need to do to achieve the goal)	Success Criteria (How will you identify your success)	Time Frame (By when you need to complete the tasks)	Resources (What or who can help you complete the task)	Progress (Actions taken to meet goal)
<i>Objective 1</i> Example: Open a Bank Account	<i>Task 1</i> Example: Compare options for different accounts in your area using NDI's Choosing a Bank			<i>Resource 1</i> Example: NDI Choosing a Bank form	
Objective 2	<i>Task 2</i> Example: Choose the bank option that best fits your needs	<i>Success Criteria 2</i> Example: Account opened	<i>Time Frame 2</i> Example: Before end of the month		<i>Progress 2</i> Example: Account is being used
<i>Objective 3</i>					
<i>Objective 4</i>					
<i>Objective 5</i>					