

Sample Action Plan



With a partner, create an action plan for the Chavez family. Use this template to set goals and identify steps to reach the goals with clients.

SCENARIO: The Chavez family, parents Ana and Lucas and children Laura, six years old, and Mateo, two years old, attend a health fair and meet Esther, a promotora from a local community-based organization. Ana tells Esther her family is new in the community and unfamiliar with the available services. Esther schedules a time to go to the Chavez’s home to spend more time with the family and determine how she can help them. During Esther’s visit, she completes a needs assessment and learns the family has not found a dentist, the family only goes to the dentist when there is a problem, Laura has three fillings, and Mateo has not had his first dental visit.

ACTION PLAN GOAL(S):			
STEP	WHAT TO DO	TIMEFRAME	TIPS OR RESOURCES TO HELP
Step 1			
Step 2			
Step 3			
Step 4			
Step 5			