

Action Plan Development Guideline

Introduction

An Action Plan is a maintenance audit option available to eligible employers to introduce measurable and meaningful improvements to their Health and Safety Management System (HSMS). This guide will help you, step-by-step, develop your Action Plan.

Step One – Building Your Objectives

Objectives are like a mini project aimed at different areas of your health and safety management system. The objective statement is the foundation of your “project” and explains what you would like to have accomplished. When building your objectives, it is recommended to identify:

- What is the deficiency, gap or change that is needed?
- What needs to be accomplished/goals?
- What are the benefits to your organization and HSMS?

Objective Requirements

There must be at least five written objectives and no more than ten. Objectives must:

- Be based on Suggestions for Improvement (SFI) from the previous year's audit (mandatory) or corporate health and safety projects (optional)
- Be completed by November 30 of the current year
- Not be repeated from a previous action plan

Example Objective

Develop and implement a consistent system to evaluate facility managers' health and safety performance using defined indicators, an evaluation process, and quarterly reporting to drive accountability and improvement.

See [Action Plan Example in Appendix A](#)

Step Two – Developing Milestones

Milestones are short terms goals that lead to your overall objective. They are often referred to as the “building blocks” or “stepping stones” of a project. If you achieve the milestones along the way, then you are moving in the right direction to achieve your overall goal.

- List the title of the Action Plan project (a short description may be included). Projects should be organization wide and not department specific.
- List milestones or significant activities to complete the project.
- Name the individual responsible for completion of the deliverable for each milestone or significant activity.

Milestone Requirements

- There must a minimum of 2 milestones per objective with a maximum of 5
- Milestones should be specific, measurable, attainable, realistic and timely

Sensitivity Level: Public

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- Milestones should provide enough detail to give the reader a clear picture of what will be accomplished. This can include specific departments, positions within the company, type of training, computer programs used etc.

Step Three – Assigning Responsibility

Assigning an individual or group to each milestone will ensure the accountability system is being followed and that everyone has a clear understanding of their specific roles within the objective.

- For items listed on the action plan where a specific individual will be responsible for its completion it is recommended to have that person listed as responsible.

Step Four – Set Target Dates

Setting a target date for each milestone will ensure whoever is assigned the responsibility will have an expectation for when it should be completed.

As each milestone will have an impact on completing your overall objectives and could affect other milestones, it is critical to ensure timelines are being followed and a schedule is set.

Target Date Requirements

- Milestones must begin in the current year and be completed by no later than November 30 of the current year.

Step Five – Determine your Deliverables

Each milestone requires a deliverable that confirms completion. The deliverable is to be submitted to AMHSA. Deliverables by themselves aren't the objective, rather, they are the tangible products of the milestones. The more deliverables you complete on time, the better your chances of meeting the objective on schedule.

Deliverable Requirements

- The number of samples that will be provided
- When submitting revised policies and forms, you must provide both the previous document and the updated version. Please indicate under deliverables that both will be submitted.
- Specific details on what type of document will be submitted (e.g. email, memo, meeting minutes, sign off, schedules, PowerPoints, spreadsheets, pictures etc.)

Example Deliverable

Submit 10 certificates that verify supervisors have completed training for incident investigations.

Step Six – Assigning Points to Each Milestone

Points are based on the approximate time it will take to complete the milestone and the resources needed.

- Overall points must total 100 points for all objectives combined. This allows AMHSA to determine the percentage completeness of the Action Plan

Scoring Guide

The scoring guide table below is based on the approximate time it will take to complete the milestone, and the resources needed. If there are milestones that you think should be awarded more points, it must be justified in the notes area at the bottom of each objective.

Milestone	Points
Large Scale New Training Development (e.g., PowerPoints)	10 points
Small Scale New Training Development (e.g., Memos/Toolbox Talks)	4 points
Updating Existing Training Content	5 points
External Training 1-15 Employees	8 points
External Training 16-29 Employees	10 points
External Training 30+ Employees	12 points
Internal Training 1-15 Employees (Safety Meetings, Internal Courses)	5 points
Internal Training 16-29 Employees (Safety Meetings, Internal Courses)	8 points
Internal Training 30+ Employees (Safety Meetings, Internal Courses)	10 points
Email Communications	1 point
Management Sign-off	2 points
New Policy/Procedure Development	5 points
Update Existing Policy/Procedure	3 points
Posting Policies	1 point
Development of Formal Hazard Assessments	3 points each (max 12 points)
Review of Formal Hazard Assessments	2 points per sample (max 8 points)
Develop Forms	4 points
Update Forms	2 points
Develop Tracking Tools (e.g., spreadsheets, metrics)	5 points
Update Tracking Tools	3 points
Implementing Tracking Tools	5 points
ERP Drills (Actual)	5 points per drill (max 10 points)
ERP Drills Tabletop	4 points per drill (max 8 points)
Completed Forms (Inspections, Tours, Orientations etc.)	2 points per form
Preventative Maintenance Records	2 points
Researching Information	1 point

Guidance Quick Reference Table

An Action Plan checklist is included for your reference below:

Guidance Requirement
5-10 written objectives (audit Suggestions for Improvement)
2-5 milestones per objective <ul style="list-style-type: none">• Milestones should be specific, measurable, attainable, realistic and timely (SMART)• Milestones should provide enough detail to give the reader a clear picture of what will be accomplished. This can include specific departments, positions within the company, type of training, computer programs used etc.
Objectives tied to prior audit Suggestions for Improvement or corporate health and safety initiatives
Deliverables with specifics & quantification
No reused actions from previous Action Plan
Specific Responsibility assigned per milestone
Target dates within current year & ≤ Nov 30
Deliverables submitted by Nov 30

Related Documents

- AMHSA Action Plan Template
- Action Plan Procedure

Appendix A – Action Plan Example

Audit Element/ Audit Recommendations and Objective	Action Plan Project with Milestones or Significant Activities to Complete Project	Activity Assigned To	Relative Weighing of Activity	Deliverables submitted to AMHSA as evidence of completion	Target Date for Completion	Actual Completion Date	Action Plan Score – (Completed by AMHSA)
1.08) Develop a system to evaluate the health and safety performance of facility managers. Objective: Develop and implement a consistent system to evaluate facility managers' health and safety performance using defined indicators, an evaluation process, and quarterly reporting to drive accountability and improvement	1. Identify and develop indicators to measure the H&S performance of facility managers. 2. Develop an evaluation form and procedure for measuring the H&S performance of facility managers. 3. Create a quarterly performance report template for manager performance.	B. Thomas	10	Provide the performance indicators.	31/Mar/26		
2) Update the internal Hazard Assessment Training program Objective: Update the internal formal hazard assessment training program to include psychosocial hazards so hazard assessments better reflect all relevant workplace risks and strengthen the effectiveness of the HSMS.	Add the 13 psychosocial factors to internal formal hazard assessment training program.	B. Thomas	15	PPT of the formal hazard assessment training containing the 13 psychosocial hazards	30/Oct/26		
3)Utilize the OIS Clinic Objective: Implement and operationalize the OIS Clinic program by finalizing service arrangements and delivering training so managers, supervisors, and workers understand how to access, communicate, and apply the program consistently.	1. Finalize the OIS Clinic contract with WCB. 2. Develop training for the OIS Clinic for all staff, including the benefits, where the information can be found and how to communicate to employees. 3. Train Supervisors and up on the OIS Clinic responsibilities. 4. Train current workers on OIS Clinics.	B. Thomas	5		15/May/26		
9.12) Develop and deliver incident investigation training for managers and supervisors. Objective: Develop and deliver incident investigation training for managers and supervisors to improve investigation quality, timeliness, and corrective action effectiveness across the organization.	1. Identify the training needs of managers and supervisors. 2. Develop course outline for investigation training. 3. Develop course contents/materials for training.	M. Smith	10	Provide results of the needs assessment.	15/Apr/26		
		J. Doe	5	Provide the course outline	15/Jun/26		
		J. Doe	15	Provide the completed course	15/Nov/26		