The Action Log

This is a tool for recording and tracking action items; it provides clarity of what is to be done, regular review of actions, and a traceable record of actual completion.

Action Log						
Meeting/Team:				Meeting Date:		Page ______ of ______
Item #	Task	Person Responsible	Plan Date	Actual Date	Deliverable What action/s will complete this item?	Customer/Comments

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FIELDS	
MEETING/TEAM	Name of meeting or team that has ongoing responsibility for all actions on this action register. Member names are optional.
MEETING/DATE	Date at which actions were last added or updated.
PAGE ___ OF ___	The number of pages may vary from meeting to meeting depending on how many open actions exist.
item #s	**Assign a unique number to** each **action. Start with number 1 at the beginning of the year and continue in sequence throughout the year.** (As items are completed, they are moved to a closed action register, so **do not reuse previously assigned numbers**.) Assign separate numbers to items that can be completed separately (even though they are related). You may list related items as “18a, 18b, 18c,” etc.
TASK	What is the task or situation that requires action? **Describe the task or action to be performed using a verb-noun format.** (i.e., **secure room** for next meeting).
PERSON RESPONSIBLE	Name the person **responsible /accountable** for the task. **ONLY ONE PERSON IS RESPONSIBLE,** even if the task is shared. If you wish to indicate a shared task, underline the name of the primary person responsible.
PLAN DATE	Write the projected date for completion of the task and deliverable in the “What?” column. If the date changes, put brackets [ ] around the original date and list the new plan date below.
ACTUAL DATE	**Record the date** the item was completed. If an item is intentionally deleted, dropped or transferred, record the date that the decision was made, and write “deleted” or appropriate action. When an item is completed, it stays on the action register (usually shaded) for one more reporting cycle to document its completion or intentional deletion or transfer. Once the cycle is completed, the completed action item is deleted from the current list. Completed action items should be transferred to a separate document in numerical order.
DELIVERABLE/S	How will you know the action is done (e.g., report presented)? **Describe the deliverable to be achieved; use a noun-verb format.** For completed items, describe the tangible evidence of completion (e.g., document) and where a copy or record is located. (This is NOT just a past tense version of the task. What EXACTLY is the expectation of what you will deliver? There may be multiple expectations; *see example sheet.*)
CUSTOMER/COMMENTS — UPDATE	Who is the customer? To determine who is the customer, answer the question, “Who needs this to be done?” You are never your own customer. However, the team may be the customer. For items that are in process, comment on their status. For items that are canceled or dropped, describe why the item no longer is needed. For items transferred to another team, list the name and department of the person who accepted responsibility for completion. If possible, also list action register number.
HOW TO MAINTAIN AN ACCURATE ACTION REGISTER:	▶ ***PUBLISH REGISTER WITHIN 24 HOURS*** after the meeting to ensure attendees know what actions they are responsible for and when the task is due. ▶ Review and update the status of all open items on a regular interval as defined by the work team, i.e., at each meeting, weekly, monthly, etc. Team leader or designee retains a record of completed actions for two years. Use “closed” registers for assessing and auditing team effectiveness in managing actions. Look for trends to improve effectiveness in accomplishing tasks completely and on time; this is also effective when used in project post-mortems.

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