

Writing Action Plans:

Every captive requires action plans to be developed and periodically updated for their members. The action plan is a roadmap to help the members move from where they are now to where they want to be; think of it as a loss-prevention GPS. There is a value to a well-written action plan, but that value is not always self-evident. Understanding what that true value is can make it easier when writing an effective action plan.

CHURCHILL CASUALTY LIMITED An ACTION PLAN for LOSS PREVENTION Policy Year 2023-2024					
					Goal #
MEMBER	Family Express Corporation	NAICS CODE	44711	PLAN APPROVED?	YES <input type="checkbox"/> NO <input type="checkbox"/>
LOCATION	Valparaiso, IN	NAICS TITLE	Gasoline stations with convenience stores	BOARD MEMBER	Mr. Kent Meyer
CONTACT	Ms. Jayme Bailey	2022 TRCR	4.63	DATE APPROVED	
CONSULTANT	Curtis Heulton	2022 LWCR	1.82	LP ALLOCATION	\$11,304

GOAL & MEASUREMENT	ACTION STEPS	TEAM	PROJECTED DATE	DATE COMPLETED
1. GOAL (Desired result, % , date) 	1. 	 	 	
	2. 	 	 	
2. METRIC (Leading Indicator) > > > > 	3. 	 	 	
	4. 	 	 	
	5. 	 	 	

Before you met with the client/member, you should have reviewed their ELA and be familiar with their losses, or claims.

FAMILY EXPRESS CORPORATION
CHURCHILL CASUALTY, LTD

ENHANCED LOSS ANALYSIS

LOSS PERIOD: JANUARY 1, 2017 – APRIL 30, 2022

LINES OF COVERAGE: Workers Compensation, Auto Liability, General Liability, Premises Medical

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This should have guided your conversations as you worked with your safety contact to come up with they would like to do and how you can help them accomplish these things. The things you talked about should form the basis of the action steps.

GOAL & MEASUREMENT	ACTION STEPS	TEAM	PROJECTED DATE	DATE COMPLETED
1. GOAL (Desired result, % , date) Reduce claim experience in 2024 by 10% over 2022 experience of \$219,064.	1. Implement a motor vehicle policy for company owned and <u>employee owned</u> cars.	Stephanie Buijick Curtis Healton	Q1 2024	■
	2. Increase communication between MS Companies and Client locations by developing a form for reporting injury information and OSHA recordkeeping information.	Stephanie Buijick Curtis Healton	Q4 2023	Q3 2023
2. METRIC (Leading Indicator) > Maintain lag time at current rate of <3.0 days. > 90% completion of client site visits each year by managers.				

Writing the Action Steps

- **Write the action steps before you set the goals.** The goal is going to be a way to measure the effectiveness of the steps that they are taking.
- Use “Active” words like **Develop, Establish, Implement, Create, Train, Assess, Review, Update, Monitor, Evaluate, Analyze, Improve, Reinforce, Conduct, Identify, Mitigate, Streamline, Enforce, Investigate, Document, Communicate.**
- So, one action step might be ***Create a stretching poster using internal resources.***

Setting Goals

Now that you have figured out what steps you and the member are going to take, it is time to write the goal and measurements. Your goal should be a SMART goal, that clearly defines a measurable outcome based on the steps you just developed.

SMART Goals

Writing SMART Goals

Specific - identify a clear, precise outcome to be achieved.

Measurable - use quantifiable metrics that can be used to track progress.

Achievable - make it challenging but within realistic reach .

Relevant - aligned with the overall safety objectives for the organization.

Time Bound - provide specific deadlines or timeframes for completion.

The Team and the Projected Date

Include yourself as a part of the team whenever possible. Set dates that give them plenty of time to implement the steps. Realize that they are probably very busy, and we don’t want to establish a tight timeline – the timeline is the least important item on this plan.