

# The Brief Action Planning Guide

## A Self-Management Support Tool for Chronic Conditions, Health, and Well-being

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Brief Action Planning is structured around 3 core questions, below. Depending on the response, other follow-up questions may be asked. If at any point in the interview, it looks like it may not be possible to create an action plan, offer to return to it in a future interaction. Checking on the plan is addressed on page 2. Question #1 of Brief Action Planning is introduced in interactions after rapport has been established.

1. Ask Question #1 to elicit ideas for change. "Situation" may be substituted when appropriate.  
***"Is there anything you would like to do for your health in the next week or two?"***
  - a. If an idea is shared and permission received, help the person make the plan SMART - Specific, Measurable, Achievable, Relevant and Timed. You may need to explain what a plan is.  
***"Many people find it useful to get very specific about their plan. Would that work for you?"***  
With permission, complete as many details as are welcomed or helpful.  
***"What?"*** (type of activity, specific behavior or action; consider giving an example or examples if useful.)  
***"When?"*** (time of day, day of week)  
***"Where?"***  
***"How often/long/much?"*** (often: once, three times, five times; long: minutes, days; much: servings, meals)  
***"When would you like to start?"***
  - b. For individuals who want or need suggestions, offer a behavioral menu.
    - i. First ask permission to share ideas.  
***"Would you like me to share some ideas that others have used or that might fit for your situation?"***
    - ii. Then share two to three ideas ALL AT ONCE. The ideas are relevant to their goal, not too specific, and varied. Use the last idea to prompt one of their own.  
***"Some things you might try are \_\_\_\_\_, \_\_\_\_\_ or maybe you have an idea of your own that occurs to you now."***
    - iii. Then ask what they want to do.  
***"Do any of these ideas work for you?"***
    - iv. If an idea is chosen, with permission, specify the details in order to make the plan SMART (1a above).
  - c. After the individual has made a specific plan, elicit a commitment statement.  
***"Just to make sure we both understand the details of your plan, would you mind putting it together and saying it out loud?"***
2. Ask Question #2 to evaluate confidence. The word "sure" can be substituted for the word "confident." Words, gestures, images or analogies (such as climbing a mountain) can be substituted for numbers. Scaling confidence without numbers often requires judgment. Use non-verbal cues and clarifying questions as needed to make an assessment about whether or not the person may or may not benefit from further problem-solving.  
***"I wonder how confident you feel about carrying out your plan. Considering a scale of 0 to 10, where '0' means you are not at all confident or sure and '10' means you are very confident or very sure, how confident are you about completing your plan?"***
  - a. If confidence level is greater than or equal to 7, go to Question #3 below.  
***"That's great. It sounds like a good plan for you."***
  - b. If confidence level is less than 7, problem solve to overcome barriers or adjust the plan. Explain the reason to boost confidence.  
***"5 is great. That's a lot higher than 0, and shows a lot of interest and commitment. We know that when confidence is a 7 or more, people are more likely to complete their plan. Do you have any ideas about what might raise your confidence to a 7 or more?"***
  - c. If they do not have any ideas to modify the plan, ask if they would like suggestions.  
***"Would you like to hear some ideas that might raise your confidence?"***
  - d. If the response is "yes," provide two or three ideas (behavioral menu). Often the following menu applies:  
***"Sometimes people cut back on their plan, change their plan, make a new plan or decide not to make a plan. Do you think any of these work for you or is there an idea of your own?"***
  - e. If the plan is altered, repeat step 1c and Question #2 as needed to evaluate confidence with the new plan.

3. Ask Question #3 to arrange follow-up or accountability.  
***“Would it be useful to set up a check on how it is going with your plan?”***

If they want to check, make the follow-up plan specific as to day, time and method (with themselves, with another via phone, email, in person, etc.)

#### Checking on Brief Action Planning

1. First ask, ***“How did it go with your plan?”***
  - a. If they completed their plan, recognize (affirm) their success.
  - b. If the plan was partially completed, recognize (affirm) partial completion.
  - c. If they did not try to do their plan, say, ***“This is something that is quite common when people try something new.”***
2. Then ask, ***“What would you like to do next?”***
  - a. If the person wants to make a new plan, follow the steps on page 1. Use problem solving and a behavioral menu when needed.
  - b. They may want to talk about what they learned from their action plan. Reinforce learning and adapting the plan.
  - c. If the person does not want to make another action plan at this time, offer to return to action planning in the future.

#### The Spirit of Motivational Interviewing

The Spirit of Motivational Interviewing underlies Brief Action Planning.

- **Compassion:** Caring about what is important to another person and feeling moved to help.
- **Acceptance:** Respecting another person and their right to change or not change.
- **Partnership:** Working together with another person and recognizing them as equal.
- **Evocation:** Bringing out another’s ideas, strengths, and knowledge about the situation and themselves. This can include encouraging to explore.

Adapted from Miller W, Rollnick S. Motivational Interviewing: Preparing People for Change, 3ed. 2012.