



A **delivery plan** is a high-impact, evidence-based plan that clearly connects the work being done to the expected outcomes and is used to drive the day-to-day work. An effective delivery plan – or set of plans – is crucial to the success of any delivery effort.

EDI’s delivery plan rubric allows users to assess how well existing plans perform on the **eight characteristics of an effective plan**:

- Articulate its aspiration
- Identify its relevant strategies
- Assign leadership, management, and accountability
- Identify the relevant delivery chain(s)
- Create feedback loops for managing performance
- Anticipate and prepare for risks
- Describe the resources and support required
- Set a trajectory for implementation

For each characteristic, the rubric asks questions about the plan. Then, the rubric gives descriptions of what a weak plan (Red) and a strong plan (green) look like for each characteristic. Users should give one of four ratings for each of the eight characteristics: red, amber red, amber green, or green.

Delivery plan rubric

Rating scale:

Red
Amber / Red
Amber / Green
Green

	Criteria	Key Questions	Weak Plan (Red)	Strong Plan (Green)
Strategies	Articulate its aspiration	Have we defined a vision for what we want this plan to achieve in terms of outcomes? What will success look like? How will things be different?	<ul style="list-style-type: none"> Aspiration is not well defined or is ambiguous Desired outcomes are not specified 	<ul style="list-style-type: none"> Plan specifies an ambitious, easy-to-understand aspiration with a clear moral imperative Plan defines the aspiration in terms of specific and measurable outcomes Aspiration is linked to overall system commitments and goals
	Identify the relevant strategies	Have we defined a coordinated and coherent set of strategies that will collectively help us to achieve the aspiration? How and why do we believe that these strategies will work?	<ul style="list-style-type: none"> No strategies are defined or strategies are vaguely defined 	<ul style="list-style-type: none"> Plan has defined a clear set of strategies that are based on best practices inside and outside the system Strategies are defined and sequenced to work together to achieve the aspiration Each strategy has a theory of action for how it will have an impact on the aspiration
	Assign leadership, management, and accountability	Have we defined a single person who is responsible for the plan as a whole and for each of the strategies? How will these people interact with other leaders and with the delivery team?	<ul style="list-style-type: none"> Overall plan has no owner or multiple owners Each strategy has no owner or multiple owners Other roles not defined 	<ul style="list-style-type: none"> Overall plan has a single owner from the senior leadership team who is responsible for ensuring that the plan achieves the aspiration Each strategy has a single accountable owner Role of delivery team in supporting leaders is well defined
Delivery Chains	Identify the relevant delivery chain(s)	Do we know how each strategy will reach the field at scale? Have we specified who needs to do what, what capacity or motivation they will need, and who will engage them and how?	<ul style="list-style-type: none"> Roles not well defined, or roles give an inaccurate/incomplete picture of realities on the ground 	<ul style="list-style-type: none"> Each strategy specifies clear roles at every level, from state to classroom, with clear analysis of how the necessary capacity and motivation will be developed at scale
	Create feedback loops for managing performance	Have we specified how we will know that each strategy is working? Do we know how we will collect and monitor this information?	<ul style="list-style-type: none"> No indicators given other than the main measure of success Implementation timeline is vague or non-existent 	<ul style="list-style-type: none"> Each strategy has a defined set of indicators of success that is based on the delivery chain, including: <ul style="list-style-type: none"> Specific and time-bound implementation milestones Leading indicators of implementation quality Plan includes mechanisms to monitor this information
	Anticipate and prepare for risks	Have we identified the major risks and weaknesses in the delivery chain that might throw the work off course? Do we know how we will manage them?	<ul style="list-style-type: none"> No risks identified, or risk assessment is unrealistic, with no attempt at real solutions for management 	<ul style="list-style-type: none"> The plan details risks and constraints along the delivery chain, including weak relationships, chokepoints, funding shortfalls, and other major issues There is a potential solution for managing each risk
Targets and Trajectories	Describe the resources and support required	Have we identified the personnel, financial, technological, and other resources that are required for the plan's success?	<ul style="list-style-type: none"> Resources are not mentioned or are vague/unrealistic 	<ul style="list-style-type: none"> Plan gives a clear picture of how the plan can be achieved with resources available – or it specifies how the needed resources can be obtained
	Set a trajectory for implementation	Have we defined a clear measure of success – what it means to achieve the aspiration? What is our end target for this measure? Our intermediate targets? Why do we believe that our strategies will allow us to hit these targets?	<ul style="list-style-type: none"> Measure of success not well defined No linkage drawn between strategies and impact on the measure of success No intermediate targets 	<ul style="list-style-type: none"> Plan defines a clear measure of success for the aspiration and a time-bound end target Trajectory of intermediate targets comes from a series of evidence-based estimates of the impact that each strategy will have on the measure of success Target and trajectory are validated by relevant benchmarks to ensure that they are ambitious and realistic

