Initiative Inventory Completion Protocol
June 2024, Version 2

How to fill out the Initiative Inventory

Introduction

The Initiative Inventory[1] is a tool used by an implementation team to assess current efforts related to areas of focus prior to adding new initiatives.

Purpose

The Initiative Inventory helps implementation teams analyze the status of current initiatives and clarify the relationships between ongoing commitments. It can be used to facilitate the prioritization of initiatives and provide opportunities to create common language, identify common goals, share resources, and build collective capacity.

Outcomes

- Identification of initiatives that share similar outcomes and/or customers

- Identification of where integration of initiative efforts would improve outcomes

- Identification of gaps in implementation processes

- Collaboration amongst initiatives to decrease duplication of efforts

- Facilitate conversations about prioritization of initiatives, opportunities for collaboration, and integration of work

Materials

All team members should have access to the initiative inventory.

Procedure to Completion

1. Use the protocol to complete the tool in groups. Start by naming the major initiatives taking place that are related to the focus area and involve training and/or technical assistance. Be as explicit as possible when describing the work that is being done (e.g., provide the name of tools, outcomes, and trainings).

2. After each individual or group has completed the tool, combine the responses into one larger document that can be discussed.

3. You may also want to go through the combined tool and highlight areas of overlap (e.g., highlight initiatives that share customers or training content).

4. Then, as a team, answer the questions on the final page of the Initiative Inventory to consider potential collaboration.

Information to Complete

Need to Know	Information
Date of Completion	
Region/District Name	
Names of Participants	
Focus area(s) this initiative inventory is addressing	

Initiative Inventory Table to Complete

Name of Initiative (practice or innovation)	What personnel are involved in coordinating the implementation of this initiative?	What training and learning opportunities are delivered for this initiative? Who and when?	What technical assistance (coaching and/or consulting) is provided for this initiative?	Who are the customers of the training and technical assistance?	How are you ensuring the initiative is implemented as intended? What are you measuring?	How are you measuring those outcomes?
Initiative 1						
Initiative 2						
Initiative 3						
Initiative 4						
Initiative 5						
Initiative 6						

Questions to consider areas for potential collaboration

Use the Initiative Inventory to consider areas for potential collaboration by comparing your responses with the responses of other people, offices, or units. Then, identify actionable items that can facilitate prioritization, collaboration, and integration.

Questions	Considerations
What initiatives share similar customers?	
What initiatives share similar training, education, and technical assistance?	
What initiatives share similar outcomes?	

Where might alignment and integration improve the implementation and outcomes of initiatives?	
Identify actionable items that can facilitate prioritization, collaboration, and integration of work.	

References

[1]Adapted from the initiative inventory from the National Implementation Research Network (NIRN): Tool: Initiative Inventory – AI Hub (unc.edu)