

Action Plan Template and Next Steps for RBTs

Why You Need a Personal Action Plan

- A written action plan turns career goals into concrete steps with deadlines
- It helps you track progress, stay motivated, and communicate your goals to supervisors and employers
- Without a plan, advancement happens by chance, with one, you drive your own growth
- This template brings together every section of this guide into a single working document you can revisit and revise

How to Use This Template

1. Copy this template into a document or spreadsheet you can edit
2. Complete each section honestly, base your answers on where you are right now
3. Share your completed plan with your supervising BCBA or clinical director
4. Review and update the plan every three months
5. Adjust your timeline and goals as your interests and circumstances evolve

Section 1

Where I Am Now

- Current credential: _____
- Months or years of RBT experience: _____
- Populations I have worked with (age ranges, diagnoses):

- Settings I have worked in (home, clinic, school, community, telehealth):

- Clinical skills I am confident in: _____
- Clinical skills I am still developing: _____
- Current supervision arrangement: _____
- Additional certifications or training completed: _____

Section 2

Where I Want to Be

- My 12-month goal: _____
- My 3-year goal: _____
- My 5-year goal: _____

Roles I am interested in (check all that apply)

- Lead RBT / Senior RBT
- RBT Trainer
- Clinical Coordinator
- Early Intervention Specialist
- School-Based RBT
- Feeding / Sleep / Toileting Specialist
- Social Skills Group Facilitator
- Telehealth Service Provider
- BCaBA
- BCBA
- Adjacent career (special education, speech-language, occupational therapy, case management)
- Populations or settings I want to gain experience with:

- Specializations I want to pursue: _____

Section 3

Gap Analysis

- Skills I need to build for my next role: _____
- Credentials or certifications I need: _____
- Education I need to complete: _____
- Fieldwork hours I need to accumulate: _____
- Experience gaps I need to fill (populations, settings, program types):

- Training or workshops I need to attend: _____
- Portfolio materials I need to create or update: _____

Section 4

Quarterly Goal Setting

****Quarter 1 Goals****

****Quarter 2 Goals****

****Quarter 3 Goals****

****Quarter 4 Goals****

- Choose one or two goals per quarter, do not overload yourself
- Make each goal specific and measurable
- Share your quarterly goals with your supervisor
- Goal 1: _____, Target date: _____
- Goal 2: _____, Target date: _____
- Action steps: _____
- Resources needed: _____
- How I will measure success: _____
- Goal 1: _____, Target date: _____
- Goal 2: _____, Target date: _____
- Action steps: _____
- Resources needed: _____
- How I will measure success: _____
- Goal 1: _____, Target date: _____
- Goal 2: _____, Target date: _____
- Action steps: _____
- Resources needed: _____
- How I will measure success: _____
- Goal 1: _____, Target date: _____
- Goal 2: _____, Target date: _____
- Action steps: _____
- Resources needed: _____

- How I will measure success: _____

Section 5

Milestone Tracker

| Milestone | Target Date | Date Completed | Notes |

|-----|-----|-----|-----|

| Complete 40-hour RBT training | | | |

| Pass RBT competency assessment | | | |

| Pass RBT certification exam | | | |

| Complete first 6 months as RBT | | | |

| Master DTT and NET implementation | | | |

| Begin mentoring new RBTs | | | |

| Complete first specialized workshop | | | |

| Update professional portfolio | | | |

| Discuss advancement plan with BCBA | | | |

| Begin BCaBA or BCBA coursework | | | |

| Begin tracking fieldwork hours | | | |

| Complete fieldwork hours | | | |

| Pass BCaBA or BCBA exam | | | |

- Use this section to record completed milestones and target dates for upcoming ones

Section 6

Supervision Plan

- My supervising BCBA: _____
- Supervision frequency: _____
- Topics I want to focus on in supervision: _____
- Skills I want observed in the next quarter: _____
- Feedback I have received and my follow-up actions: _____
- Questions I want to bring to my next supervision meeting:

Section 7

Continuing Education Plan

- Training or workshops I want to complete in the next 12 months: _____
- Conferences I want to attend: _____
- Books or journals I want to read: _____
- Online courses or webinars I want to take: _____
- Budget for continuing education: _____
- Employer support available (tuition reimbursement, stipends, paid training): _____

Section 8

Portfolio Checklist

- Professional summary written and current
- Credentials and certifications documented
- Clinical experience log up to date
- Anonymized data and outcomes samples included
- Training and continuing education records organized
- Professional references confirmed
- Resume current and tailored to my target role
- Cover letter template ready to customize
- Portfolio reviewed within the last six months

Week 1

Self-Assessment

1. Complete Section 1 of the action plan template, be honest about where you are
2. Review the core competency self-assessment checklist from Section 2 of this guide
3. Identify two or three clinical skills you want to strengthen first
4. Gather your current credentials, training certificates, and supervision records in one place

Week 2

Goal Setting

1. Complete Section 2, write down your 12-month, 3-year, and 5-year goals
2. Complete Section 3, identify the gaps between where you are and where you want to be
3. Choose your first quarterly goals using Section 4
4. Make each goal specific enough that you will know when you have achieved it

Week 3

Conversation With Your Supervisor

1. Schedule a conversation with your supervising BCBA or clinical director
2. Share your completed action plan and goals
3. Ask for their input on your timeline and target areas
4. Request their support, observation time, training opportunities, or fieldwork supervision if applicable
5. Agree on a plan for checking in on your progress

Week 4

Begin Execution

1. Start working on your first quarterly goal
2. Update or begin your professional portfolio using the checklist in Section 8
3. Begin a professional development log to track training, feedback, and milestones
4. Set a recurring calendar reminder to review your action plan every three months

Sustaining Momentum Over the Long Term

Review Your Plan Quarterly

Revisit Your Goals Annually

Watch for Signs You Need to Adjust

Build a Support Network

- Schedule a 30-minute review every three months
- Assess what you accomplished, what stalled, and what changed
- Adjust your goals and timeline based on what you learned

- Celebrate milestones, acknowledging progress keeps you motivated
- Once a year, review your 12-month, 3-year, and 5-year goals
- Ask whether your goals still match your interests and circumstances
- Update your plan to reflect new opportunities, challenges, or priorities
- Share your updated plan with your supervisor
- If you feel chronically exhausted, you may be taking on too much, scale back and reassess
- If you are bored or stagnant, you may need a new challenge, add a specialization or leadership goal
- If your interests have shifted, update your target role, it is normal for goals to evolve
- If your supervision is not supporting your growth, address it directly or seek a new arrangement
- Connect with other RBTs who are also working toward advancement
- Join state or local ABA chapter groups for networking and encouragement
- Find a mentor, a senior RBT, BCaBA, or BCBA who has walked the path you are on
- Share your goals with family and friends so they understand and support your commitment

Common Pitfalls and How to Avoid Them

- Setting too many goals at once, focus on one or two per quarter
- Waiting for someone else to notice your ambition, tell your supervisor what you want
- Letting your action plan sit in a drawer, review it regularly and update it
- Comparing your timeline to others, your path is your own
- Neglecting your current RBT work while planning for the next step, strong current performance opens doors
- Forgetting to document your progress, a development log is your evidence of growth
- Underestimating the time and cost of advancement, plan realistically and seek support early

A Closing Note on Career Growth as an RBT

- Your RBT credential is a starting point, not a ceiling
- Every section of this guide exists because RBTs before you have walked these paths successfully
- Advancement in ABA rewards consistency, curiosity, and a willingness to ask for what you need
- The clients you serve today benefit from the skills you build for tomorrow
- Start with one goal, take one step, and keep going

This guide to leveling up as an RBT includes the following sections

Use this guide as a working reference, return to individual sections as your goals evolve, and use the action plan template to keep yourself on track from where you are now to where you want to be.

- 1.** Introduction to RBT Role and Career Pathways
- 2.** Core Competency Development Areas
- 3.** Supervision and Mentorship Strategies
- 4.** Continuing Education and Certification Options
- 5.** Building a Professional Portfolio
- 6.** Transitioning to BCaBA or BCBA
- 7.** Leadership and Specialization Opportunities
- 8.** Action Plan Template and Next Steps