

Tip sheet: Creating an action plan

An action plan enables you to create plans designed to help you achieve a particular outcome or goal. You may wish to create a plan to help you develop areas that you currently perceive as being in need of improvement or you may wish to create an action plan after completing your annual review process.

A completed action plan will look like this

The screenshot shows a web interface for the REFLECT system. At the top, there is a 'Display Options' tab and the REFLECT Institute for Learning logo. Below the header, there is a title 'Class trip to the Black Mountain' with a document icon. The main content area is structured as follows:

- Current Situation**
This is where you are right now
- Ideal Situation**
This is where you want to be
- Steps to success**
 - This is how you will get there
- SWOT analysis**
 - Strengths**
This is why you will get there
 - Weaknesses**
This is why you need to get there
 - Opportunities**
This is what you'll gain by getting there
 - Threats**
This is anything which could stop you getting there
- Supporting Resources**
 - Books / journals**
These are tools to help you get there
 - Reflection**
This is how you got there

At the bottom of the page, there is a footer with the IFL logo, a copyright notice for Colin Dalziel (2009), and the REFLECT logo. A small disclaimer and terms and conditions link are also present.

more...

01

02

03

04

05

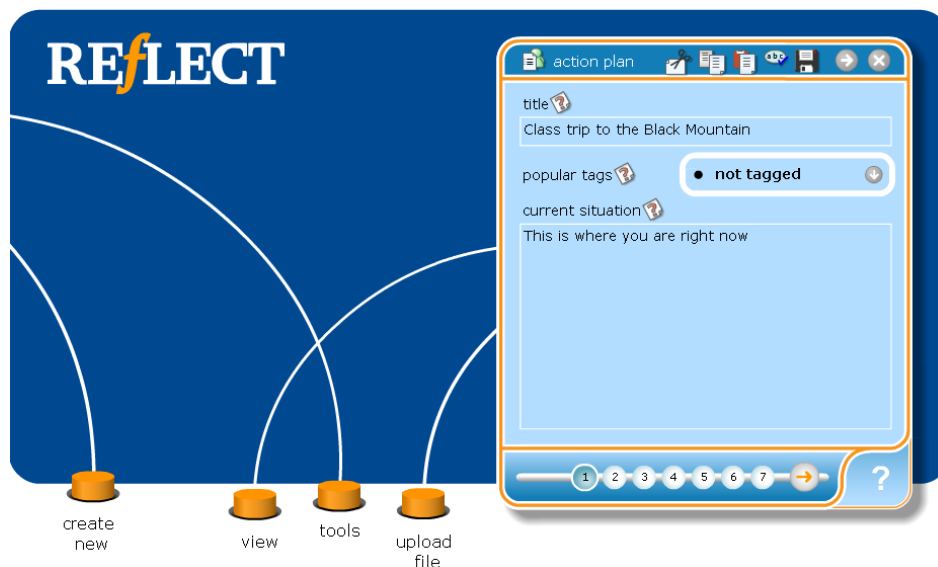
06

As with all assets the fields on an action plan are there to provide the fields on an action plan are there to provide scaffolding rather than being a prescriptive requirement.

Therefore all fields except the title are optional.

This is how to create an action plan:

Click the **create new** button and choose **action plan** from the menu.



In the pad that opens there are areas to add a **title**, select **tags**, and add a **current situation** to your action plan. This should include details of why you need to create this action plan but not details of what your action plan will achieve; this comes in the next stage.

You can find more information on adding tags on the tip sheet 'tagging an asset'.

Move to the next step by clicking the **number 2** button or the **next arrow** at the bottom of the pad.

You can describe your ideal situation in step 2. This is where you want to be when you have fulfilled your action plan.

p2

more...

01

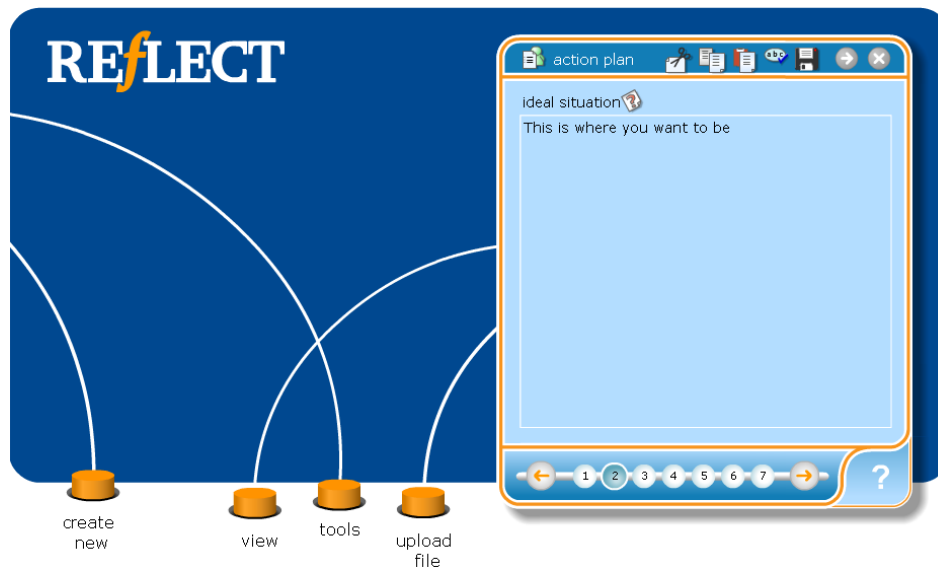
02

03

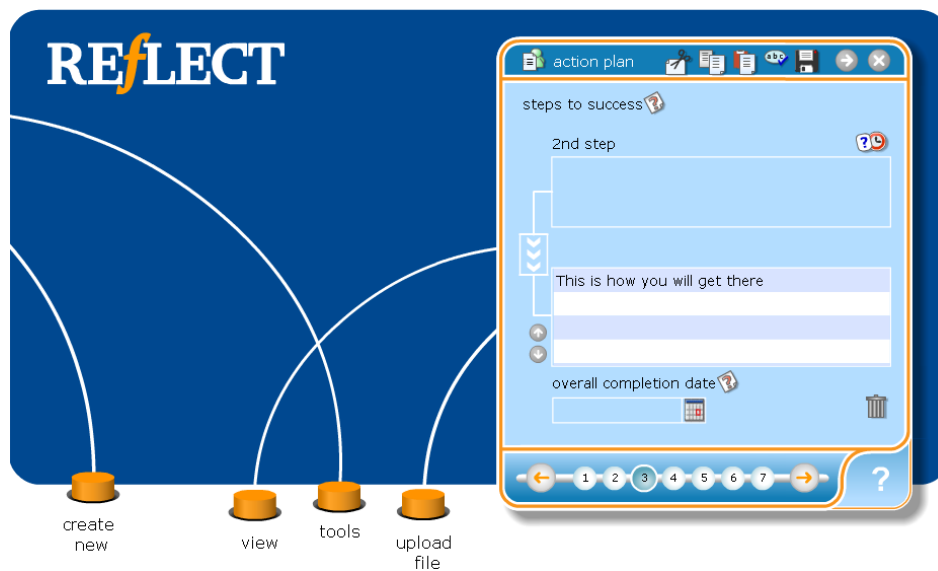
04

05

06



Move to the next step by clicking the **number 3** button or the **next arrow** at the bottom of the pad.



Here you can create **steps to success**. Type the step you wish to take into the box at the top.

You can add a date and description to any step using the **how and when** button at the top right of the box. Click the **chevrons** on the left to add it to the list.

p3

more...

01

02

03

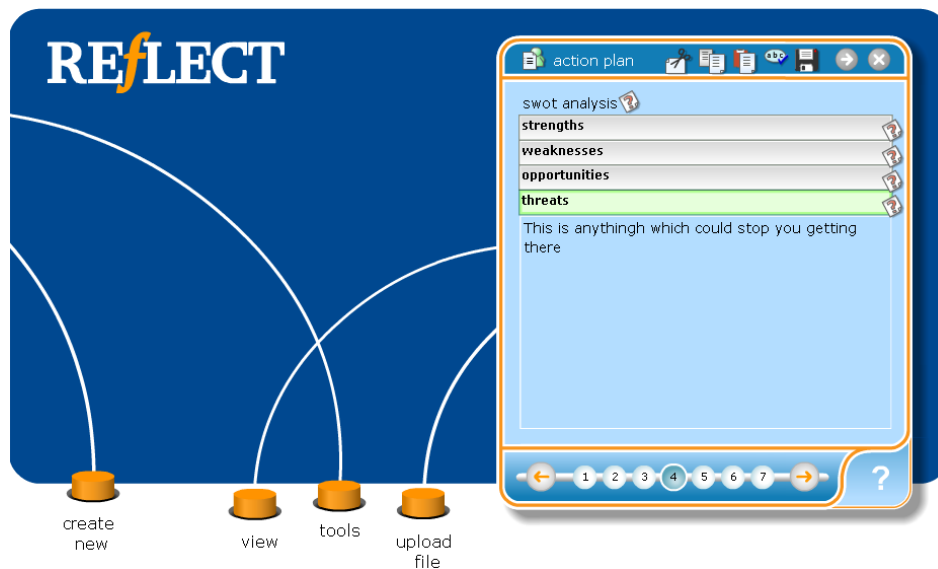
04

05

06

TIP! These steps can be re-ordered by selecting them and using the arrows to the left. Move to the next step by clicking the **number 4** button or the **next arrow** at the bottom of the pad.

This step is your **SWOT analysis**, which looks like this:



SWOT stands for **strengths, weaknesses, opportunities and threats**, and is a useful tool to help you think through how to achieve your action plan.

Clicking on any of the headings will enable you to enter details for the chosen category, in the text box which appears below, however not every action plan requires **SWOT analysis**.

Move to the next step by clicking the **number 5** button or the **next arrow** at the bottom of the pad.

more...

01

02

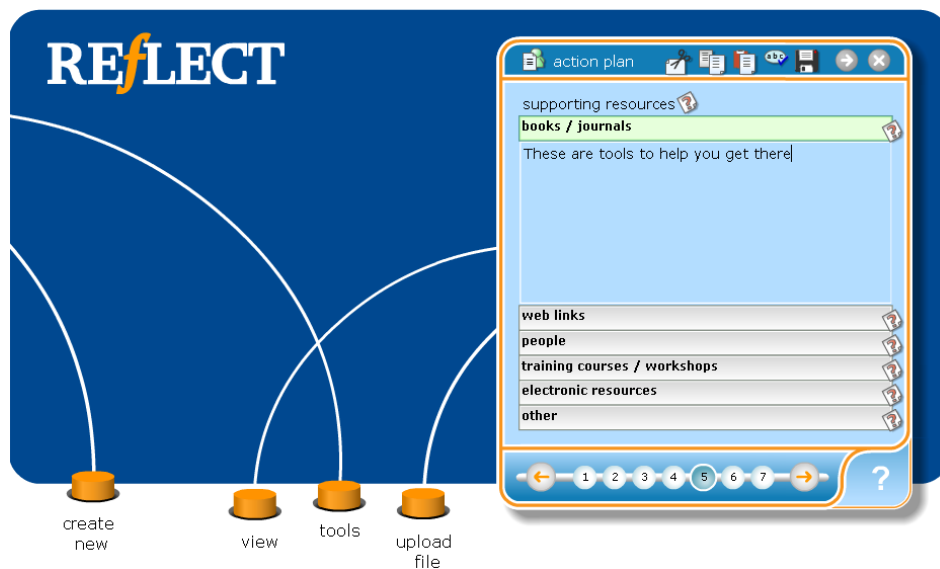
03

04

05

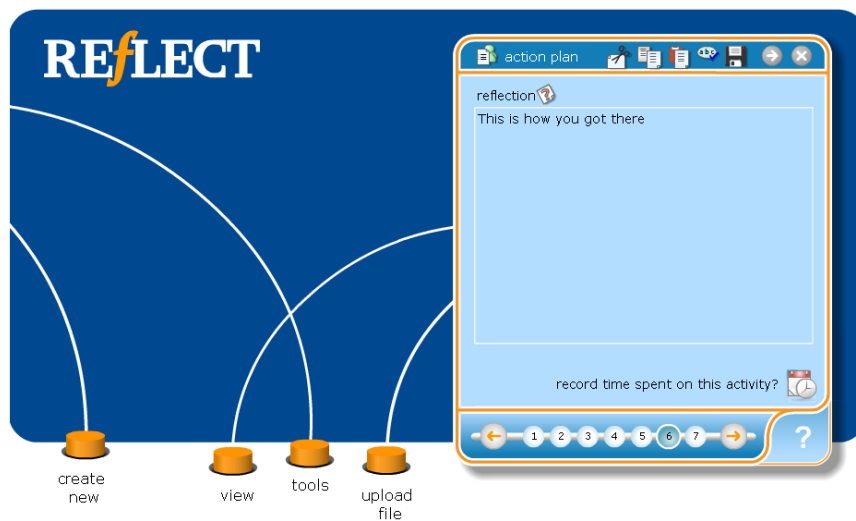
06

This section allows you to add details of any **supporting resources** you need to help you with your plan. This section has a number of discrete headings you can choose to use.



Move to the next step by clicking the **number 6** button or the **next arrow** at the bottom of the pad.

In this section you can reflect on the action plan. You may want to include how achievable the action plan is, or why having a plan is useful, or how the results of this action plan may be applied in practice.



more...



Move to the last step by clicking the **number 7** button or the **next arrow** at the bottom of the pad.

The last page of the asset creation pad has a list of options;

- view
- send to a person, the web, a gateway, a blog, a CPD record, word or a printer
- add a review, add or edit a link or evidence
- tag the asset

More information on tagging and sharing/sending are available from their respective tip sheets.

Click on the **green tick button** to save and close your asset.

Tip! Remember to **record time spent on this activity** during the process. Click this

button  whenever you see it.