
Developing a Learning Plan

A Learning Plan can serve as a useful tool for planning and managing professional development.

Developing a Learning Plan requires that you:

1. Identify a **Learning Goal**, the ability (i.e. knowledge, skill or attitude) to be developed;
2. Identify the **learning experience** needed to develop that ability; and
3. Identify the **support required** to develop and apply that ability.

Then the coach and employee simply need to manage the plan:

- A. Agree to the plan – discuss and sign to show commitment;
- B. Do it – following through;
- C. Set time aside to “check in” with each other to discuss progress; and
- D. Provide ongoing feedback and recognition to help guide and reinforce progress.

Please refer to the Learning Plan when planning and managing individual development.

As well, please see Appendices A, B, C and D as food for thought when identifying the “Learning Experiences” and “Support Required”.

Contents

Seven Steps to Success

Learning Plan

Section 1: Learning Opportunities

Section 2: Play to Your Strengths

Appendices

Appendix A: Learning Experiences

Appendix B: Support Required

Appendix C: Adult Learning

Appendix D: References

Seven Steps to Success

Step 1: Collect

Collect information from various people regarding what they perceive to be your top strengths and areas for improvement.

Step 2: Reflect

Reflect on the information and identify what you personally believe are your top two learning needs and top two strengths.

Step 3: Complete Draft Learning Plan

Translate your top two learning needs into tangible Learning Goals, and then complete the corresponding Learning Experience and Support Required sections of the Learning Plan. Identify how you will use your top two strengths to help you perform your role, by completing the Play to Your Strengths section.

Step 4: Finalize Learning Plan

Meet with your coach to present your draft Learning Plan. Your coach will either support the plan as presented, or will work collaboratively with you to refine the plan. Once finalized, you and the coach sign off on your commitment to the plan.

Step 5: Keep it for Future Reference

If the Learning Plan is being completed as part of the Performance Development Plan (PDP), then it is used to support the brief Development Plan section, and should be attached to the PDP as an appendix and submitted to Human Resources. You and the coach should each keep a copy of the Learning Plan in your files for reference throughout the year.

Step 6: Act

During the course of the year, you are responsible for following through on your commitment to the plan, and so is your coach. You should periodically take the initiative to check in with your coach to confirm your progress by asking for feedback, and to adapt the plan to suit a new situation, as required.

Step 7: Return to Step 1:

If the Learning Plan was completed as part of the PDP process, you will once again receive feedback from your coach for your reflection and response. If this is being completed for any other reason, you should consider seeking feedback from others.

Learning Plan

Employee Name:

Title:

Section 1: Learning Opportunities

<p>A. Learning Goal 1 What do I want to be able to do? <i>(e.g. I want to be able to chair an efficient meeting)</i></p>	<p>C. Learning Experience What action(s) will I take to develop the skill required to achieve this goal? <i>(Please see Appendix A for helpful ideas)</i></p>
<p>B. Importance Why is achieving this goal important to me? <i>(e.g. Our meetings will be more productive and I will feel more comfortable chairing meetings)</i></p>	<p>D. Support Required What do I need from others in order to achieve this goal? <i>(Please see Appendix B for helpful ideas)</i></p>
<p>A. Learning Goal 2 What do I want to be able to do?</p>	<p>C. Learning Experience What action(s) will I take to develop the skill required to achieve this goal?</p>
<p>B. Importance Why is achieving this goal important to me?</p>	<p>D. Support Required What do I need from others in order to achieve this goal?</p>

Section 2: Play to Your Strengths

<p>A. Strength 1 What is one of my main strengths? <i>(e.g. Asking probing questions)</i></p>	<p>C. Strategy How can I use this strength to help me perform my role? <i>(e.g. When managing and developing others, I can ask more questions and listen more to what others would propose, as opposed to always just telling them “the” answer).</i></p>
<p>B. Benefit What does this strength help me to do? <i>(e.g. Helps me to uncover important things that might not otherwise come forward)</i></p>	<p>D. Support Required What do I need from others in order to do this? <i>(Please see Appendix B for helpful ideas)</i></p>

<p>A. Strength 2 What is one of my main strengths?</p>	<p>C. Strategy How can I use this strength to help me perform my role?</p>
<p>B. Benefit What does this strength help me to do?</p>	<p>D. Support Required What do I need from others in order to do this?</p>

Employee: Type name here

Date:

Signature: _____

Coach: Type name here

Signature: _____

Appendix A: Learning Experiences

All too often, people believe that a formal training course is *The Answer*: the only means by which we can develop and refine the skills for success. Although formal training programs can provide considerable value when designed and facilitated properly, the reality is that there are many other methods for fostering adult skill development.

Example Learning Experiences

<ul style="list-style-type: none"> - Present a report to management - Attend internal training workshops - Participate on a committee or project team - Troubleshoot a problem that would typically be escalated to others - Attend another department’s meeting - Participate on a hiring panel - Become active in a community organization - Coach a sports team - Mentor someone - Serve on a community board - Job shadow someone for a day - Pursue a degree or professional certification - Meet with someone who is particularly good at something and interview them on their skills - Participate in a 360-feedback process - Participate in a career planning or job enrichment discussion with your boss or a trusted advisor - Use your boss or someone at a higher level as a mentor for a specific skill or set of skills that he/she is particularly good at - Attend seminars and conferences 	<ul style="list-style-type: none"> - Attend a presentation about a different team or process - Design and deliver a course or presentation - Lead an article discussion - Participate in a benchmarking study - Pursue a career development assignment - Pursue an acting assignment - Launch a change (e.g. process, procedure, policy, etc.) - Run or chair a meeting - Attend external training workshops - Lead or participate in a focus group - Supervise a co-op student - Read a book or article - Become active in a professional organization - Ask someone for feedback - Interview a senior person in the organization about their experiences and lessons learned - Help your boss prepare for a presentation or address a work-related problem - Pursue an “executive coach” (e.g. external consultant/industrial psychologist) - Participate in peer discussion groups - Participate in book clubs or article discussion groups
--	---

Appendix B: Support Required

The main supports that a coach can provide are to:

- a) Have honest and respectful discussions with employees about what you perceive to be their strengths and key learning needs;
- b) Allow employees to be fairly self-directed, by empowering them to develop draft learning goals for your review, and by allowing them to choose from and gain access to a wide range of learning resources and opportunities;
- c) Provide constructive feedback if an employee strays off course;
- d) Provide guidance and advice, but stop short of simply providing the answer unless the situation is desperate; indeed, strive to help the employee to “think it through” and find a workable answer on their own; and
- e) Provide ongoing recognition to acknowledge and encourage their progress.

Everyone is unique; therefore, employees must reflect on their own learning needs and how the coach can support them, and then clearly communicate this to their coach.

Appendix C: Adult Learning

The field of “Adult Learning” was pioneered by Malcolm Knowles. Knowles has identified several key characteristics of adult learners that we can consider when planning adult learning experiences. These characteristics are organized and summarized as follows:

- **Adults have a need to be self-directing.** As such, employees should be provided with an opportunity to actively participate in diagnosing their learning needs, formulating learning goals, identifying helpful resources and learning experiences, and evaluating the success of learning initiatives. As well, employees should be given general guidance, and then an opportunity to “learn by figuring it out on their own” instead of simply being provided with the answer.
- **Adults have considerable life experience.** The practical “lessons learned” from life experience can be shared to help others develop. As well, connecting learning experiences to past experience(s) can make the learning experience more meaningful for the employee, and can help the employee to acquire the new knowledge.
- **Adults are relevancy-oriented.** Employees must see a reason for learning something – it has to be applicable to their work or other responsibilities. As such, it is essential to communicate that developing the skill is important for the employee’s “real life” success (for example, by relating this need to feedback provided, an upcoming assignment and/or their personal or professional goals).
- **Adults are task-oriented.** Adults generally are not interested in knowledge for its own sake, and are generally not interesting in simply listening to a presenter. As such, it is important to demonstrate how any theories or concepts can be practically applied to real life situations.
- **Adults want respect.** It is important to acknowledge the wealth of experiences that adults have, by allowing employees to have adult to adult conversations in which they can safely voice their opinions and share their experiences.

Appendix D: References

Center for Creative Leadership, Ideas Into Action Guidebooks for the Practicing Manager

- Reaching Your Development Goals
- Preparing for Development – Making the Most of Formal Leadership Programs
- Three Keys to Development – Defining and Meeting Your Leadership Challenges
- Setting Your Development Goals – Starting With Your Values
- Setting Priorities
- Tracking Your Development

Management Development Program (MDP)

<http://www2.carleton.ca/hr/for-managers/learndev/>

- There are several workshops in the MDP that will help support you as manager in the area of managing and developing your staff.