

Learning Plan

A learning plan can serve as a useful tool for planning and managing the professional development of an employee.

Developing a learning plan requires an employee to:

- Identify a **learning goal or goals**, e.g., develop a new skill or increase your knowledge in an area.
- Identify a **learning experience** needed to develop the goal (Appendix I)
- Identify the **support required** to develop and achieve the goal (Appendix II)
- Consider the characteristics of adult learners to help explore non-traditional learning options, like mentoring or job training. (Appendix III)

Executing a learning plan requires the manager and the employee to:

- Complete the plan.
- Agree and sign off on the plan.
- Set time aside to “check in” to discuss and guide the progress of the plan through regular one on one meetings.

Seven Steps to Success

The following is a seven-step approach that may help employees complete their learning plans.

1. **Collect Information:** Collect information from various people regarding what they perceive to be your top strengths and areas for improvement.
2. **Reflect on the Information:** Reflect on the information collected and identify what you personally believe are your top two learning opportunities and top two strengths.
3. **Complete the Draft Learning Plan:** Translate your top two learning opportunities 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 achieve your learning goal, by completing the Play to Your Strengths section.
4. **Finalize the Learning Plan:** Meet with your manager to present your draft learning plan. Your manager will either support the plan as presented or will collaborate with you to refine the plan. Once finalized, you and the manager will sign off on your commitment to the plan.
5. **Keep the Learning Plan for Future Reference:** If the learning plan is completed as part of the Performance Dialogue Plan (PDP), then it should be attached to the PDP as an appendix. A copy of the plan should be kept.
6. **Act:** During the year, the employee is responsible for following through on the learning plan. The employee should take the initiative to check in with the manager to confirm progress by asking for feedback, and by adapting the plan as needed.
7. **Return to Step 1:** When the learning plan is part of regular check-ins, the manager should provide feedback specific to the plan to allow the employee to further reflect and respond to it.

Template Learning Plan

The following template can be used as a starting point when creating a learning plan.

Learning Opportunities
Learning Goals: <i>What two goals do you want to be able to accomplish? (e.g., chair an efficient meeting)</i>
Goal (1)
Goal (2)
Importance: <i>Why is achieving each goal important to you? (e.g., I will feel more confident managing meetings)</i>
Learning Experience: <i>What actions will you take to move these goals forward? (Refer to Appendix I)</i>
Support Required: <i>What do you need from others to achieve these goals? (Refer to Appendix II)</i>
Play to your Strengths
Strengths: <i>What are two of your main strengths? (e.g., active listener)</i>
Benefit: <i>What do these strengths help you accomplish? (e.g., better understanding of different perspectives)</i>
Strategy: <i>How can you use these strengths to help you perform your role? (Refer to Appendix I)</i>
Support Required: <i>What do you need from others, or your manager, to achieve these goals? (Refer to Appendix II)</i>
Signatures
Employee:
Manager:

Appendix I: Learning Experiences

This list below provides some potential learning experiences. You may think of others.

- 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 manager 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 they are particularly good at.
- Attend a presentation about a different team or process.
- Attend seminars and conferences.
- 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 manager 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 II: Providing Support as a Manager

Managers have a key role in supporting an employee's learning journey. Below are some critical supports that a manager can provide to help ensure a positive experience overall.

1. Have honest and respectful discussions with employees about what they perceive as their strengths and key learning needs.
2. Allow employees to be self-directed, empower 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.
3. Provide constructive feedback if an employee strays off course.
4. Provide guidance, not advice. Be there to listen when your employee is trying to find their answers. Offer to help the employee to "think it through" and find a workable answer on their own.
5. Provide ongoing recognition to acknowledge and encourage the employee's progress.

Remember that everyone is unique in their learning needs. As a manager, you need to support and clearly communicate with your employees.

Appendix III: Adult Learning Considerations

The field of Adult Learning was pioneered by Malcolm Knowles, who identified several key characteristics of adult learners that should be considered when planning adult learning experiences. Review the below before creating a learning plan to ensure these considerations are top of mind.

- **Adults have a need to be self-directed.** 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 experience, 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. Also, connecting learning experience to experience can make the learning experience more meaningful for the employee, and can help the employee to acquire new knowledge.
- **Adults are relevancy oriented.** Employees must see a reason for learning something – it must 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 interested 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 experience that adults have, by allowing employees to have adult to adult conversations in which they can safely voice their opinions and share their experience.