

## **SuccessPlanner guidance**

### **Introduction**

**SuccessPlanner** is a generic project planning tool that can be used in any curriculum area. It has been extensively trialled with learners in a range of learning environments.

The purpose of this document is:

- to show how the **SuccessPlanner** can be used to help learners take a leading role in planning, carrying out and reviewing their learning
- to explore how the key skill of ‘improving own learning and performance’ can support the development of a range of expert learning skills
- to complete the portfolio required using **SuccessPlanner** and to have the skills accredited.

### **How planning helps to develop the expert learner**

Expert learners have many different attributes. Three that are particularly relevant to planning are the ability to:

- organise and analyse information
- plan tasks and make good use of time
- act autonomously.

You may already have discussed these and other expert learner characteristics as part of the continuing professional development activity: **Expert learner and the learner journey**.

### **Use of the SuccessPlanner tool**

When you use **SuccessPlanner** you will be asked to:

- determine learning objectives and outcomes
- define roles and responsibilities
- set goals
- set specific tasks
- formulate success criteria in relation to the tasks.

You could also use the tool to:

- keep track of progress through virtual networking
- help review progress at key points and at the end of the project.

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**Developing the expert learner**

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Each person involved in the planning or with responsibility for some part of it can be considered as a 'team member'. This reinforces the sense of planning learning in partnership with the learner. The following stages underpin a successful plan:

- **Ensure that the purpose is clear**

All project team members should understand the project brief and be able to break it down into measurable criteria for success.

- **Set a realistic timeframe**

The project should have an identified start and end date with a contingency to allow for fixes, re-working and unexpected obstacles.

- **Identify meaningful stages**

Clear stages not only make the project seem more manageable; they also provide opportunities for formative assessment against agreed success criteria for each stage, keeping the project on track.

- **Establish clear roles and responsibilities**

In the context of planning learning opportunities through work experience, the roles and responsibilities might be assigned to the work placement supervisor or employers, assessors, work placement officers or tutors as well as the learner. All those involved in the plan together comprise the project team.

- **Define tasks and resource requirements**

Spending time planning the specific activities and resources required to meet each success criteria will increase the likelihood of meeting targets on time.

- **Track progress and communicate at every step**

Keeping all team members informed of progress will increase or maintain motivation and ensure that problems don't go unchecked. If you use the **SuccessPlanner**, you will be able to share actions and track programmes virtually.

- **Build in opportunities for regular review and reflection – both in terms of the project and personal development**

The ability to identify skills gaps and to set targets for filling those gaps is an important skill for life and for employment. It is also an essential step towards

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becoming an expert learner. Reflection is also a key part of your own professional development cycle.

**Notes**

You will find additional guidance and activities to support planning with your learners in the Planning toolkit together with instructions about how to use the **SuccessPlanner** and a worked example relevant to the expert learner at <http://www.excellence.qia.org.uk>.