Financial Stewardship Institute

Action Plan Journal
ACTION PLAN REQUIREMENTS FOR THE INSTITUTE

To encourage transfer of new skills and knowledge to the work place, you are asked to complete an action plan worksheet after each workshop of the institute.

The action plans are designed for the following purposes:

Personal development
- Identify new knowledge and/or approaches and apply it in your workplace

Sharing your strengths
- Identify areas of knowledge, skills, abilities (KSA) that are your strengths and identify ways to share those strengths with your colleagues and work group to enhance their KSA’s. You become the teacher.

Improving the Institute
- Providing feedback to presenters about the usefulness of the different topics in each workshop
- Providing program evaluation data about the practical value or benefits of each session (Action Plans will be treated as confidential information and summarized as group data without revealing the names of individuals associated with specific action plans)
- Providing information about necessary resources and/or supervisory support to bring the action plans to life

To complete your Action Plan Journal:

Refer to the objectives for each workshop when identifying actions you will take. The usefulness of this workshop depends on your effectiveness in actively applying the concepts, principles, and skills that you learn. This is a crucial step to assure that what you have learned becomes behaviors that consistently demonstrate your mastery as a financial steward.

- Complete and submit an action plan promptly after each workshop
- Review your action plan with your supervisor

ELECTRONIC SUBMISSION OF ACTION PLANS

Electronic Action Plan: http://odt.uoregon.edu/professional-development-opportunities

- Log in using your “uoregon” ID and password
- On the green bar, Click on “Course Catalog”
- Click on “Certificate Programs”
- Click on “Financial Stewardship Institute”
- Click on “Action Plan Journal”
- Fill out the appropriate form for each workshop

On the last page of each journal you will be given the options to, 1) “close” or 2) “submit” your work.

1. “CLOSE”: allows you to go in and out of the Action Plan Form. Whatever you have entered will be saved, but NOT submitted, so you can access it at a later date.
   IMPORTANT: You will only be able to access partially completed work from the same computer. If you begin an action plan journal on your office computer and attempt to complete it on your home computer you will be prompted to start over from your home computer.

2. Note: Print a copy before hitting “Submit” and file it in your FSI Notebook

3. “SUBMIT”: Click this when you are ready to submit your form. After hitting “submit”, you will NO LONGER HAVE ACCESS to your Action Plan.
SAMPLE ACTION PLAN

Financial Stewardship at the University of Oregon
Workshop 1

*Workshop goal:* Through this workshop, participants will experience the UO Budget Model for the system-wide approach to financial stewardship at the University of Oregon.

**Question 1:** How will you apply the knowledge and skills you learned in this workshop? *(Be specific, identifying a specific action you will take to operationalize a concept that you learned (ie, the specific concept, when you will apply it, who will be involved))

- I will present the UO Budget Model at the next staff meeting and answer any questions.

**Question 2:** What potential barriers might prevent you from applying what you have learned? *(Be specific so that you can make plans to move beyond those barriers)*

- Time, interest (from others), and cooperation are most likely barriers.
- Not enough exposure to big picture issues.

**Question 3:** What additional resources/support will you need to apply what you’ve learned? *(Be specific, what additional knowledge do you need; where can you get that additional knowledge; if release time is needed, identify the amount; if temporary help is needed, describe that help, etc…)*

- Opportunities to dialogue with others involved in budget and finance at the UO to share specific examples of application of this information and to test out ideas.
- Information about department priorities to assure my decisions are fully informed.
- From my supervisor ongoing feedback about what is helpful/working well as I apply it, and if not, how it might be applied in a more helpful manner.