

## Adding and Editing Action Plans in WEAVE

There are at least two different ways to add action plans in WEAVEonline.

The first is to click on the Add New Action Plan button (1) in the Targets and Findings section of the Assessment Summary page.

The screenshot shows a web browser window with the URL `app.weaveonline.com/assessment/assessmentProcess.aspx`. The page displays the 'Targets and Findings' section for the measure '1: 1.1 User focus group (O:1) (Final)'. The measure description states: 'Focus group will be conducted every four years of Division staff and/or student organization representatives to get feedback about the assessment process and use of assessment results. The last focus groups were conducted in July 2013. Data collected will be used by Student Life Studies staff to improve group and individual education. [Preview Formatting]'. A table of metadata follows: Source of Evidence: Focus Groups - Focus groups; Established in Cycle: 2007-2008; Active Through: Keep Active; Entry Status: Final; Last Updated By: Kelly Cox on 11/1/2013; Established By: Darby Roberts on 5/8/2008. An 'Edit Measure' button is present. The 'Targets and Findings' section is expanded to show '1: 1.1 Clients will understand assessment process'. Under this target, there is a 'Target (Final) [Preview Formatting]' entry: 'Focus groups were conducted in July 2013. Qualitative data sorts will be completed by Student Life Studies staff in the fall and a report will be written by January 2014. Established in Cycle: 2008-2009; Active Through: Keep Active; Last Updated by Kelly Cox on 11/1/2013; Established by Darby Roberts on 5/8/2008'. An 'Edit Target' button is available. The 'Findings' section shows '2013-2014 Assessment Summary / Findings (Final)' with a 'Target: Met' status. The finding text reads: 'Qualitative sorts were conducted by the five full-time staff members in the department in October 2013. The report was written and finalized by December 2013. A copy of the report was uploaded in WEAVEonline as a reference. [Preview Formatting]'. A 'Connected Documents' section lists '2013 Focus Group Report' with a red '1' next to it. The last updated information is: 'Last Updated by Kelly Cox on 7/29/2013' and 'Finalized by Kelly Cox on 12/13/2013'. At the bottom of the findings section, there are three buttons: 'Edit Finding', 'Add New Action Plan' (highlighted with a red '1'), and 'Manage Action Plan Relationships'. The page footer shows '2012-2013 Assessment Summary / Findings'.

When you click on that button, the following page will appear.

The screenshot shows a web form titled "Assessment Summary - Add Action Plan". The form contains several sections and fields, each with a red number indicating a specific step or instruction:

- 2:** A link labeled "CLICK HERE for Tips and Examples" at the top left.
- 3:** A green button labeled "Add Relationships" in the "Relationships" section.
- 4:** A dropdown menu for "Implementation Status" set to "Planned".
- 5:** A text input field for "Condensed Description" with a character count of 128.
- 6:** A large text area for "Description" with a character count of 0 of 20,000.
- 7:** A date picker for "Projected Completion Date" set to "- Enter a Date -".
- 8:** A text input field for "Implementation Description" with a character count of 500.
- 9:** A dropdown menu for "Priority" set to "High".
- 10:** A text input field for "Responsible Person/Group" with a character count of 500.
- 11:** A text input field for "Additional Resources Needed" with a character count of 4000.
- 12:** A dropdown menu for "Requested Budget Status" set to "No Request".
- 13:** A text input field for "Budget Amount Requested: (whole number)".

At the bottom of the form, there are checkboxes for "Include on Action Plan Tracking page" and "Include in Reports", dropdowns for "Established in Cycle" (2013-2014) and "Active through Cycle" (Keep Active), and radio buttons for "Entry Status" (Draft, In Progress, Final). There are also "Save" and "Cancel" buttons.

2. Read the [CLICK HERE for Tips and Examples](#) before you create your action plan.
3. Click on the Add Relationships button to associate you action plan with your outcomes.
4. In the drop down menu, indicate what stage the action plan is in: planned, in-progress, finished, on-hold, or terminated.
5. Include a title/description that is meaningful, self-explanatory, and unique.
6. Provide a more in depth description of the action plan. What specifically are you going to do?
7. Insert an expected completion date (ideally within the next cycle). If your completion date is far in the future, you might consider breaking down the action plan into smaller units with intermediate deadlines.
8. Include the implementation description (optional) that gives more information and can keep track of accomplishments along the way.
9. Choose a priority: high, medium, or low.
10. For the responsible party or group, include the title of the person (not name).
11. Indicate if you need any additional resources (money, training, etc.).
12. These fields can be used with department planning. While these entries are not required, they can be helpful in the department budget planning process.

13. The Established in Cycle will be the current year when you are adding an action plan. Decide whether you want this action plan to move forward to the next cycle. Remember to mark the entry as Final and click the Save button!

The other way to add/edit an action plan is to click on the Action Plan Tracking option under the Assessment tab. You can then click on the Add New button and to the screen on the previous page.

When you need to update your action plans, click on the Action Plan Tracking option under the Assessment tab. This page will show the action plans by status. You can change your view of the page by click on the boxes and buttons under the Add New button.

**Action Plan Tracking**

[CLICK HERE for Action Plan Instructions](#)

[Add New](#)

View Action Plans:  Planned  In-Progress  Finished  On-Hold  Terminated

Select the set of Action Plans:  Visible  Hidden  All

**Planned**

	Priority	Projected Date	Established in Cycle	Active Through
1.3 Comprehensive Program Review (Final) <a href="#">Q</a> <span style="border: 1px solid black; padding: 2px;">14</span> <a href="#">Details</a> <a href="#">Notes</a>	High	5/31/2015	2013-2014	Keep Active

**In Progress**

	Priority	Projected Date	Established in Cycle	Active Through
3.2 Finish overall report for the longitudinal study of involvement (Final) <a href="#">Q</a> <a href="#">Details</a> <a href="#">Notes</a>	Medium	5/31/2015	2011-2012	Keep Active
3.2 Present Findings from FLO Longitudinal Assessment (Final) <a href="#">Q</a> <a href="#">Details</a> <a href="#">Notes</a>	Medium	5/31/2015	2012-2013	Keep Active

**Finished**

	Priority	Projected Date	Established in Cycle	Active Through
1.1 Update the use of results survey (Final) <a href="#">Q</a> <a href="#">Details</a> <a href="#">Notes</a>	Medium	8/31/2009	2007-2008	2011-2012

14. Click on the Details button. That will show the Action Plan Detail page, where you can then click the Edit button to make any changes.

### Important Information about Action Plans!

- A. Action plans are *required* for each target that is *Not Met* or *Partially Met*. You may add an action plan for Met targets. There is no penalty for not meeting all of your targets: if you met them all you might be setting your targets too low.
- B. You **must** have at least *one* new action plan for each cycle, even if all of your targets have been met.
- C. Action plans may be completed in the same year they were created.
- D. With few exceptions, action plans should be about the changes you are making to your program or service, not about adjusting the assessment tool.
- E. Each year, in the Analysis Questions, you will be asked to report on the progress the changes you have implemented to your program or service.
- F. If you have completed an action plan, mark it as Finished and also mark it to not move forward to the next cycle.
- G. If you have an action plan that needs to be stopped for a period of time, but you plan to go back to it at some point in the near future, mark it On-Hold, and decide whether you want it to move forward to the next cycle.
- H. If you are no longer going to work on an action plan, mark it as Terminated and also mark it to not move forward to the next cycle.
- I. Update your action plans on a regular basis in the implementation description.
- J. Be sure all entries are marked as Final!