



Instruction: HEInnovate Action Planning Board and Work Package Planning Board



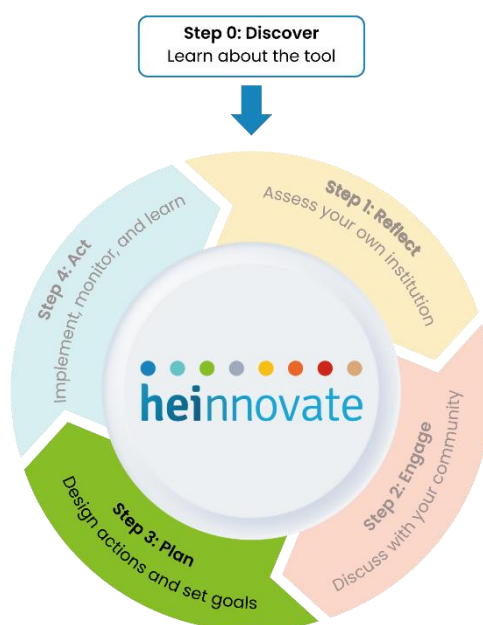
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Introduction

Self-assessment and dialogue provide a crucial foundation for understanding an institution's strengths, challenges and opportunities for development. However, for these insights to lead to meaningful progress, they need to be followed by a structured and intentional planning process. Action planning helps institutions translate reflection into concrete steps, align priorities with achievable objectives and create a clear pathway toward implementation and improvement

FIGURE 1 THE HEINNOVATE USER JOURNEY



Within HEInnovate, institutional transformation is organised into five steps: **Discover** (learn about the tool and its resources), **Reflect** (conduct a collaborative self-assessment), **Engage** (discuss results and identify priorities), **Plan** (translate insights into concrete actions), and **Act** (implement, monitor, and learn).

Understanding the templates

To support you during **Step 3: Plan – Design Actions and Set Goals**, HEInnovate makes available two specific templates. They are designed to be used after your institution has completed the HEInnovate self-assessment (*Step 1: Reflect*) and discussed the results with internal and/or external stakeholders (*Step 2: Engage*). At this stage, you have identified your institution's strengths and development areas, and you are ready to translate those insights into concrete, actionable plans. For this, you may find it valuable to have a:

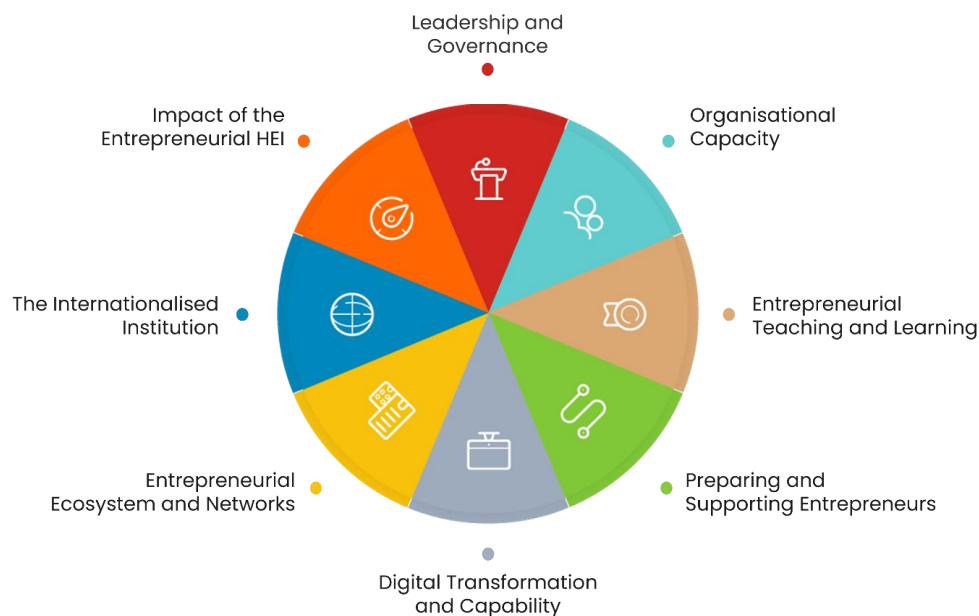
- **Action Planning Board:** A structured template organised around each of the eight HEInnovate dimensions, helping you define objectives and categorise activities by timeframe.
- **Work Package Planning Board:** A template to consolidate related activities into manageable work packages with clear ownership and timelines. The work packages can be elaborated around an HEInnovate dimension or each institution's priorities.

The templates are designed to be used together with the **HEInnovate Action Cards**, which provide practical intervention ideas organised by dimension. The Action Cards serve as thought starters and discussion prompts to help generate activities during your planning process. Together, these resources help institutions transform priorities into structured action plans that support collaboration and effective implementation.

The Action Planning Board


The Action Planning Board allows you to map all activities you would like to implement around each of the eight HEInnovate dimensions. As detailed in the explanation of the [8 Dimensions](#), each dimension represents a key area of institutional innovation and entrepreneurship.


FIGURE 2 THE EIGHT HEInNOVATE DIMENSIONS



For each dimension you choose to work on, you will define a general objective and identify activities across three timeframes: short-term, medium-term and long-term. You do not need to address all eight dimensions. We recommend focusing on your priority areas based on your self-assessment results.

FIGURE 3 THE ACTION PLANNING BOARD TEMPLATE

 Leadership and Governance



General objective of the Higher Education Institution in this dimension:

Short-term activities


Medium-term activities

Long-term activities

The Work Package Planning Board

The Work Package Planning Board helps you organise activities into coordinated packages for implementation. Related activities are often easier to implement and monitor when grouped rather than managed as individual disconnected actions. Activities in a work package may come from one or multiple HEInnovate dimensions.

FIGURE 4 THE WORK PACKAGE PLANNING BOARD TEMPLATE

Organisation into Work Packages			
Work Package	Activities Included	Work Package Leader	Estimated Time Frame

How to use the templates

We recommend using these templates collaboratively during a planning workshop with your working group. The step-by-step instructions below can be used whether you are working individually or in a group setting.

Step 1: Using the Action Planning Board

Complete one [Action Planning Board](#) for each HEInnovate dimension you want to address.

1. **Define your objective:** Write a clear, specific goal for your institution in this dimension. The objective should align with your institutional priorities and reflect the key findings from your self-assessment discussions.
2. **Review the Action Cards:** Go through the HEInnovate Action Cards for your chosen dimension. Identify cards that are relevant to your context and use them to spark ideas and discussion.
3. **Generate activities:** Based on the Action Cards and your discussions, brainstorm possible activities. If working in person, write each activity on a post-it note.
4. **Categorise by timeframe:** Place each activity in the template under short-term, medium-term or long-term based on urgency and feasibility.
5. **Review and prioritise:** Review the activities in each column. Confirm feasibility, identify dependencies and prioritise which activities are most important.

Step 2: Using the Work Package Planning Board

Once you have completed Action Planning Boards for your priority dimensions, use the [Work Package Planning Board](#) to organise activities into coordinated packages.

1. **Group related activities:** Review the activities from your Action Planning Boards and cluster them into work packages by theme, timeline, strategic area or other logical connections.
2. **Name each work package:** Give each cluster a clear, descriptive title that reflects its scope and purpose.
3. **List activities included:** Record the specific activities that belong to this work package.
4. **Assign a work package leader:** Designate a responsible person, unit or institution (if you are working in an alliance) for each work package to ensure clear accountability.

5. **Set the estimated timeframe:** Define when the work package should be completed, considering the timeframes of individual activities and any dependencies.

Keeping your Action Plan current

These templates should be treated as living documents, not one-time outputs. To ensure your action plan remains useful:

- **Update regularly:** Review and revise the templates to reflect progress, completed activities and changing priorities.
- **Use as a coordination tool:** Reference the action plan during meetings to maintain alignment and track progress across work packages.
- **Adjust as needed:** Redistribute tasks, modify timelines and reprioritise activities when circumstances change.
- **Validate commitments:** Ensure all participants confirm their responsibilities and that proposed activities remain feasible.
- **Monitor completion:** Track the completion of activities according to their timelines and celebrate achievements.

By following this approach, your institution can transform priorities into concrete actions, strengthen collaboration across dimensions and advance strategic goals in a structured and effective way.