WORKBOOK FOR ACTION TEAMS

LWTC STRATEGIC PLAN IMPLEMENTATION

2007-2008

Workbook Contents

PART I

OVERVIEW OF IMPLEMENTATION PLANNING PROCESS

Ground Rules & Expectations

A problem-solving ethic

- not "why won't this work?" but "what will it take to make this work?"

A data-driven approach

- action plans should be grounded in data and information
- ask "what information do we need to make a good judgement?"

Everyone is learning

- this is a learning process for all concerned
- ask lots of questions and raise ideas
- expect both mistakes and successes
- assume good intentions

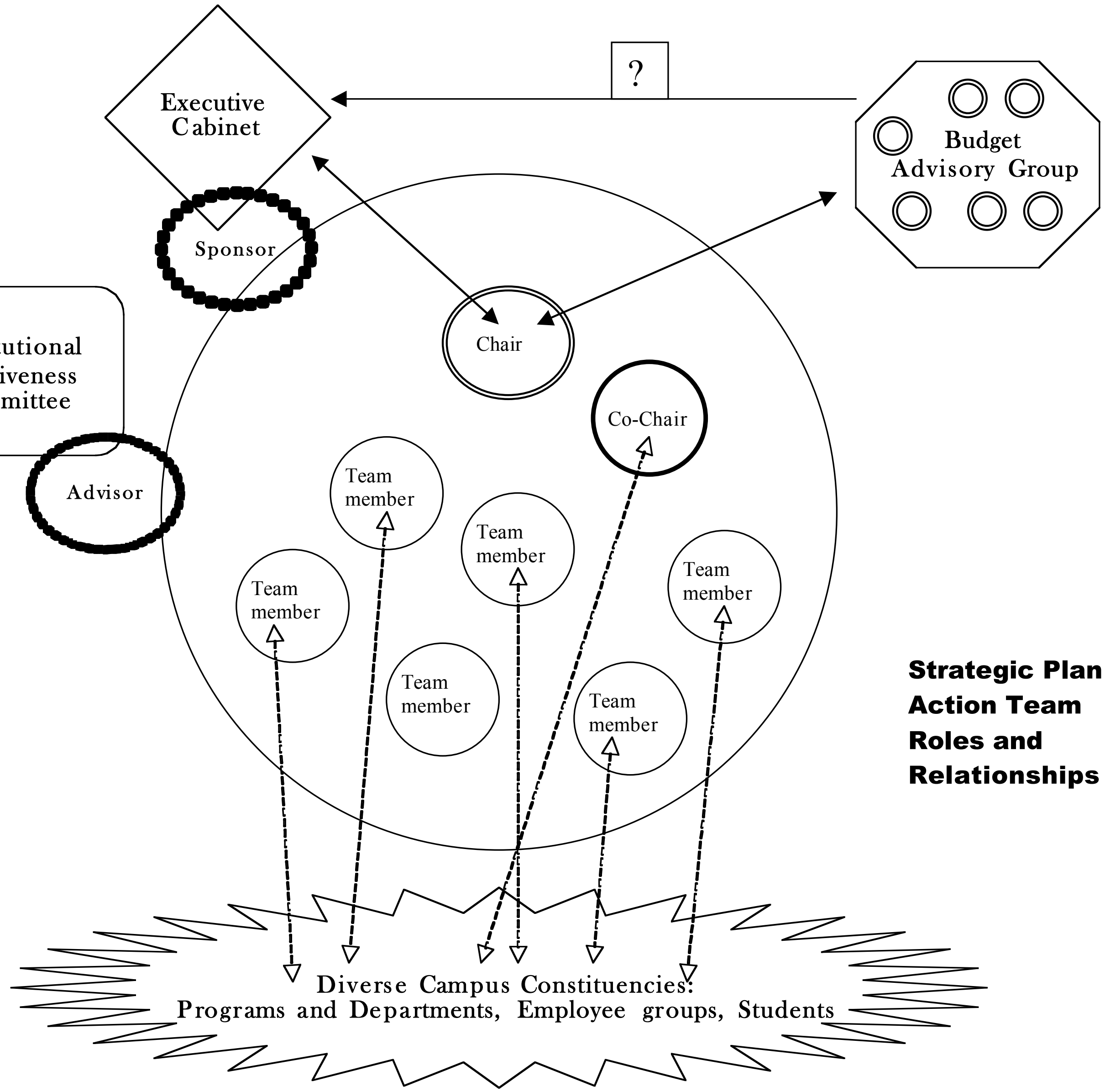
Balancing acts

- student needs balanced with fiscal realities and support of faculty and staff
- balance advocacy for constituents with whole-organization perspective

Action Team
Goals and Schedule

- ***Identify how we will achieve the desired results named in the Strategic Plan***
  - Create detailed implementation plans describing the action steps needed to accomplish each desired result
- ***Identify budget implications of implementation plans***
  - What people, tools, and/or space will be required?

Oct - Jan	Action teams create implementation plans
Feb	One day retreat with action teams and leadership to review, share, and integrate plans
Feb	Budget advisory group (made up of action team chairs) begins work developing recommendations on priorities and resource allocations.



Strategic Plan Action Team Roles and Relationships

Team Member
Roles and Responsibilities

- ★ Attend and participate in planning meetings to develop implementation plans for one or more strategic directions
- ★ Collaborate with other team members to:
  - generate and test ideas for ways to accomplish desired results
  - identify data needed to support decision-making
  - evaluate action options
  - create step-by-step action plans
  - identify budget implications of those plans.
- ★ Represent college community constituencies in implementation planning process
- ★ Participate in one-day retreat to review, share, and integrate action plans with all teams and College leadership

Team Chair
Roles and Responsibilities

With support from the Vice-Chair as needed, the Chair will...

- ★ Facilitate team meetings
- ★ Participate as team-member
- ★ Keep official team records
- ★ Present update on team progress to the Executive Cabinet
- ★ Present completed implementation plan to Executive Cabinet
- ★ Participate in one-day retreat to review, share, and integrate action plans with all teams and College leadership
- ★ Represent Action Team on Budget Advisory Committee
  - Review budget implications across all strategic directions
  - Develop recommendations regarding priorities, resource use, and funding options
  - Monitor budget process and provide feedback to cabinet as they develop budgets

IEC Advisor
Roles and Responsibilities

- ★ Support action team with data and analysis as needed
- ★ Provide guidance on interrelationships between strategic plan and other quality initiatives and accreditation standards
- ★ Support constructive group process
- ★ Work with Team Chair to plan for upcoming meetings
- ★ Support and guide Chairs in preparing presentations to Executive Cabinet

strategic direction	**advisor**
1. educational pathways	*Doug Emory*
2. learning environment	*Doug Emory*
3. student success	*Jim Howe*
4. faculty and staff	*Aron Leonard*
5. shared decision-making	*Ray Nadolny*
6. marketing and recruiting	*Jim Howe*
7. financial success	*Jim West*
8. institutional effectiveness	*Paul Hutton*

Executive Cabinet Sponsor Roles and Responsibilities

- ★ Advocate for successful planning process and excellent outcomes
- ★ Provide planning parameters and guidance as needed
- ★ Collaborate with Budget Advisory Committee to determine final priorities and resource allocations
- ★ Provide guidance on priority-setting within budget constraints
- ★ Stay informed

strategic direction	**sponsor**
1. educational pathways	*VP Instructional Services*
2. learning environment	*VP Instructional Services*
3. student success	*VP Student Services*
4. faculty and staff	*Interim President*
5. shared decision-making	*Interim President*
6. marketing and recruiting	*VP Institutional Advancement*
7. financial success	*VP Administrative Services*
8. institutional effectiveness	*VP Institutional Advancement*

Consultant
Roles and Responsibilities

Ursula Roosen-Runge of SLR (with support from Sara Saltee and Lori Martinez) will...

★ Provide coaching to action teams

- In person - Attend one meeting of each action team or with Chairs as requested
- Online - Respond to questions and participate in conversations in online conference space, "Runes"
- Telephone - Respond to questions from Chairs and Advisors (360-221-3401)

★ Facilitate full day retreat to finalize and integrate action plans

★ Write 3 newsletters for dissemination to the college community to share information and updates about the implementation planning process

★ Administer Runes conference space

What is ‘Runes’?

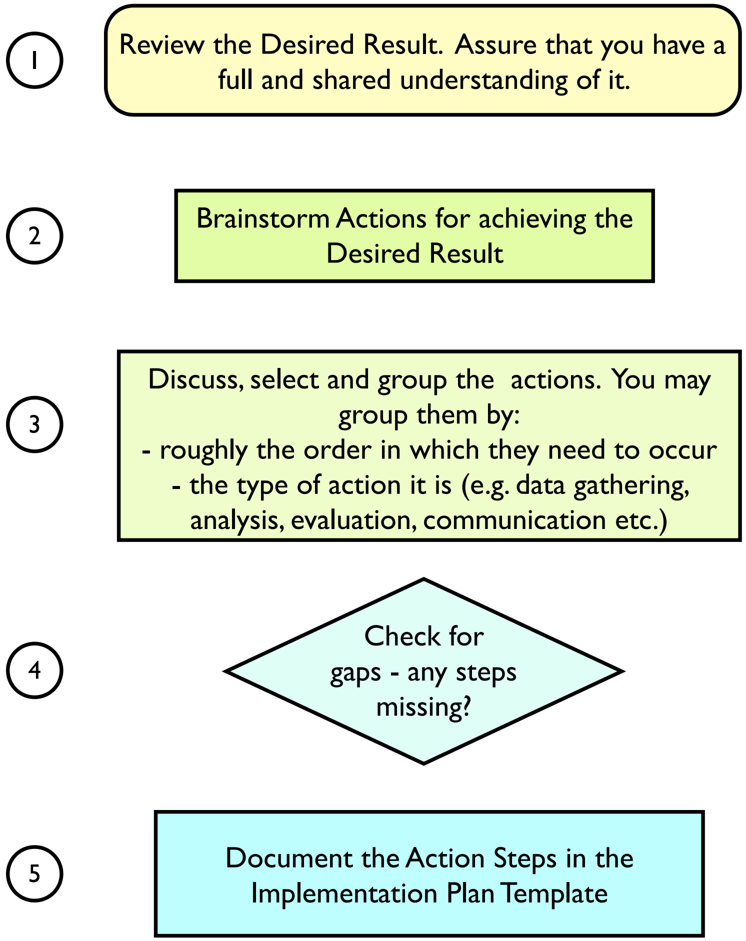
- online workspace (also called “basecamp”)
- use instead of group emails
- post messages
- share documents
- view shared calendar with meeting dates and milestones
- receive email notices of new messages
- keep a communication archive & library

PART II

INSTRUCTIONS AND TOOLS FOR ACTION TEAMS

How to Fill in the Template

Action Steps



Tips

- If you have questions about the Desired Result, consult with your IEC Advisor or post a question for SLR.
- Brainstorm as complete a list of Actions as possible.
- Make a list of ideas on a flipchart so that all can see it at one time.
- OR if the desired result is complex, put one action per 8.5x11 card or paper and post them on a wall. This will let you group them easily.
- Some Desired Results are plans. The actions should describe how the plan will be created - not the plan itself.
- Some Desired Results may read more like a measure - if so, you can reference the Action Plan for the related Results.
- Some Desired Results are very related - you may wish to discuss them at the same time or integrate their Action Plans.
- Take the time to check for missing actions - they will trip you up later.

Time Frame

1. For each of the Actions, make a reasonable estimate of the duration (how long it will take).

2. Put the Actions in the order that they need to occur, within whatever grouping you have made.

3. Put a start date and a finish date in the form of a month and a year for each action in the Implementation Plan Template.

Tips

✳ There are three components to thinking about time frames:

- how long will the action take?
- what other action needs to be completed before it can start?
- what other action needs to be completed before it can finish?

✳ Lists can be limiting in how you see what needs to happen. If you have a long list of actions, you may want to create a visual map of the events to see how they are related. Some ways to do this are:

- create a Gantt Chart
- draw a flow diagram
- write directly on a calendar

✳ You may wish to think about durations in the context of who needs to be involved (see next page) , as participatory processes often take longer than those with limited stakeholder involvement.

Responsible Persons & Stakeholders

1. Identify for each Action the person (or position) in the College who you think has the skills, expertise and position to make this Action happen. Put a name or title in the template under "Responsible Person(s)." If you think it is a shared responsibility, you may put more than one person or position.

2. Identify stakeholders. These are people who:
   - are affected by the Action
   - have skills or expertise that could help make it happen
   - have decision making authority related to the Desired Result or the specific action

3. Decide which of the stakeholders you have identified need to be kept informed and which need to be involved in making it happen. Put the position or name of group in the appropriate column of the template.

4. Now that you have a sense of who needs to be involved, take another look at the time frames. Make any needed adjustments.

Tips

- It's OK to 'volunteer' someone as the 'responsible person'. This is a draft and your recommendations will be integrated with those of other Action Teams.
- Think of the 'responsible person' as a Lead with accountability - not necessarily doing all the work.
- In some cases, one person will be responsible for the whole desired result, in others there may be separate persons identified for each Action.
- Stakeholders can be either positions or groups.

Important Considerations

1 Use this column while you are working on the actions, time frames, and participants to capture ideas about what needs to be taken into account during implementation.

Tips

✳ Important considerations can cover a lot of territory. Examples are:

- the relationship of an action to accreditation,
- the need to coordinate with the academic schedule, and
- notes about external resources that might be tapped.

Budget Implications

1. Review any notes you may have made in this section, while you were planning. Brainstorm any additional ideas about the resource needs and possible funding sources.

2. Assess the resource needs and group them. Look for ways to minimize the need for additional resources and use existing resources.

3. Be specific in your descriptions of what is needed. e.g. full time staff person for a year; scholarship money for at least 10 students; office space and computer; etc.

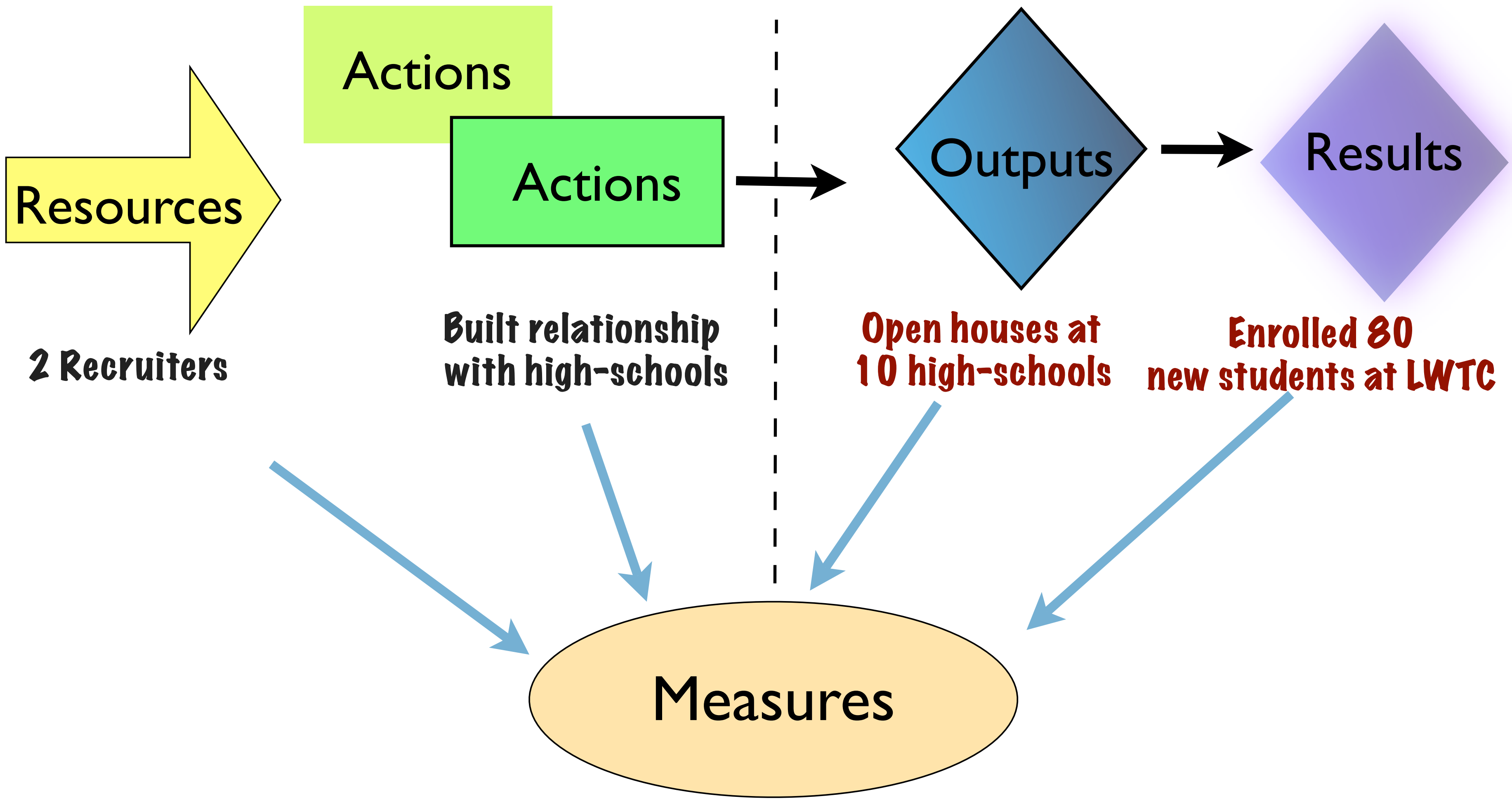
Tips

- This part of the Action Plan will provide GUIDANCE for budget development.
- While you are considering actions, you are likely to be discussing what it will take to implement them. You can use this section to keep running notes on these ideas.
- Relax, you are not being asked to estimate specific costs or identify specific revenue streams.
- In considering staffing needs, think about:
  - the skills and the amount of time needed,
  - whether volunteers or students could be enlisted, and
  - how this need compares to other demands on staff in terms of priorities.
- In thinking about possible funding sources, consider both sustainable sources and possible one-time investments or donations.

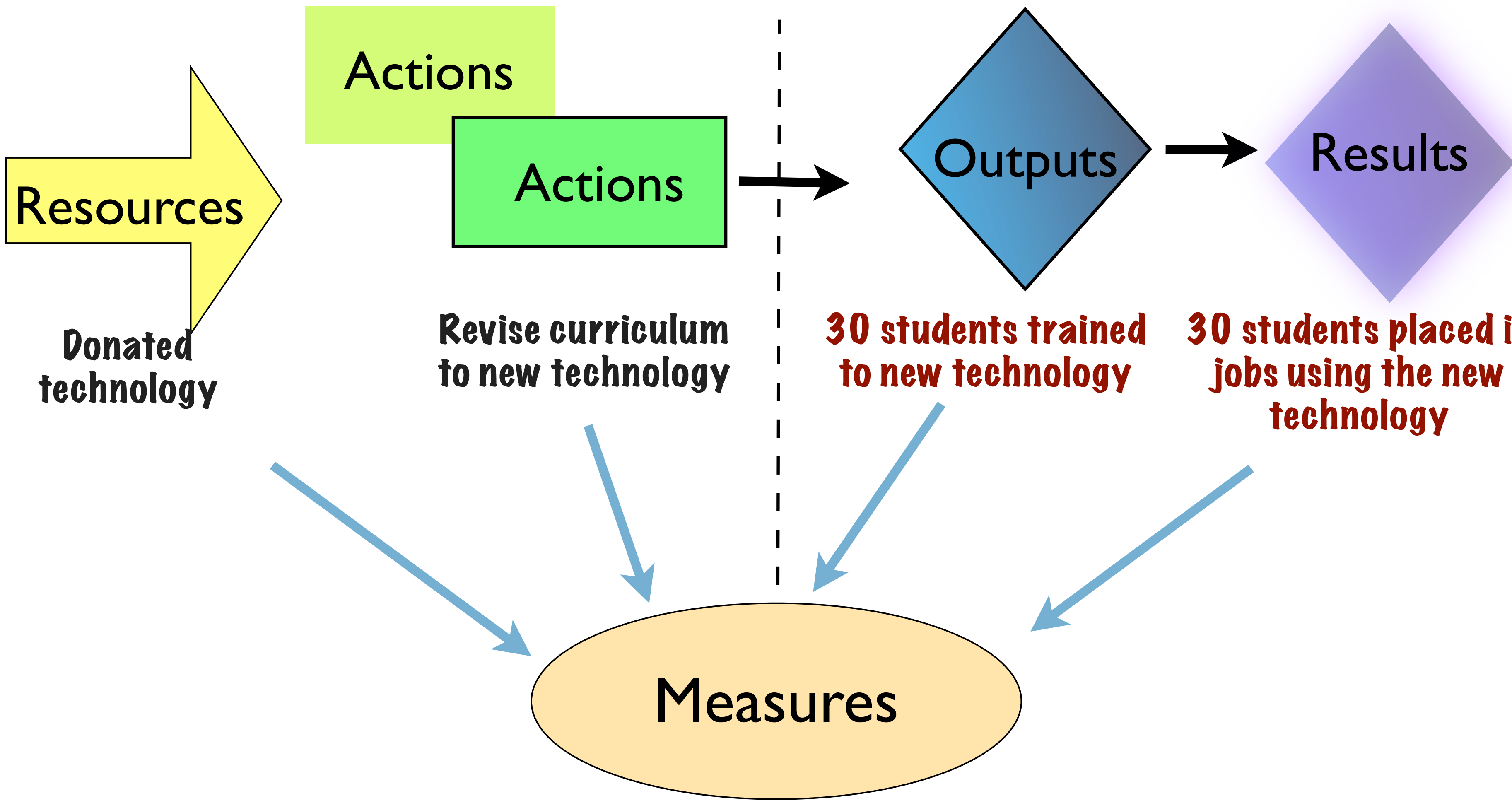
A Side Trip: Effective Institutional Measures

1. Are systematic: address all aspects of the organization
2. Are linked to strategic and operational plans
3. Don't disrupt or add to work significantly
4. Balance quantitative and qualitative data and multiple perspectives
5. Measured at intervals that permit learning and improvements

Example #1 of Performance Measures



Example #2 of Performance Measures



Guidelines and Parameters

SD 1 - Educational Pathways	• SLR estimates 15-18 hours of meeting time is needed to compete the Action Plans. Team should work on highest priorities first. • Action Plans should be completed no later than January 18th.
SD 2 - Learning Environment	• The highest priority is desired result #1 related to standards and global outcomes. • Some of the Desired Results are related (e.g. #2 and #4). It may save meeting time to consider them at the same time. • Desired Result #8 resembles a measure - referencing the Action Plans for other Desired Results may be appropriate here. • SLR estimates 24-28 hours of meeting time may be needed to complete all Action Plans. Team should work on highest priorities first. • Action Plans should be completed no later than January 18th.
SD 3 - Student Success	• Action Plans should address the need to identify pre-requisites and placement methodology for all classes. • SLR estimates 10-12 hours of meeting time is needed to complete the Action Plans. • Action Plans should be completed no later than December 7th.

Guidelines and Parameters

SD 4 - Faculty & Staff	• Both Desired Results are Plans. The Action Plans should address both how the Plans will be developed and what it might take to position the College to implement them. • SLR estimates that 6-10 hours of meeting time is needed to complete the Action Plans. • The Action Plans should be completed by December 7.
SD 5 - Shared Decision Making	• Note the **Shared Decision Guidelines** from the Cabinet that follow this table. • SLR estimates that 12-16 hours of meeting time is needed to complete the Action Plans. • The Action Plans should be completed by December 7.
SD 6 - Recruiting & Marketing	• The processes should include the setting of program and division targets for number and type of students. • Assume that Instructional Services, Student Services, and Institutional Advancement will work closely together on this Strategic Direction. • Emphasis should be on programs that are in demand, and potential student populations with the greatest opportunity for 'yield.' • Action plan should include potential development of programs in Duvall. • Action plan should include potential development of BAS. • Desired Results 1 and 2 may be approached from the perspective that they are plans that need to be developed. The Team may also want, however, to suggest specific actions that would lead to implementation of some processes in 2008. • SLR estimates that between 10 - 16 hours of meeting time may be needed, depending on the approach. • The Action Plans should be completed by January 18.

Guidelines and Parameters

SD 7 - Financial Success	• Action plan should address how a 3 year budget will be developed. • Plan should address the link between international programs and the financial success of the college. • Focus on revenue generation - not just dividing the pie. • Plan should identify areas where significant efficiencies could be achieved • Desired Result #1 was added by the Board of Trustees. It is similar to the Strategic Direction and can be addressed through Action Plans for Desired Results 2 - 5. • SLR estimates that 18 - 20 hours of meeting time may be needed to complete the Action Plans. • The Action Plans must be completed no later than January 18.
SD 8 - Institutional Effectiveness	• The Action Plans should address how benchmarks will be set that can be agreed to by the college community. • All divisions will need input into this action plan. • The documentation of the workgroup's efforts will be important for the accreditation visit in Spring '08. • SLR estimates that 20 - 28 hours of meeting time may be needed to complete the Action Plans. • The Action Plans should be completed by January 18.

Guidelines & Parameters

SD 5 - Shared Decision-making

At the September 5th, 2007 Executive Cabinet Retreat, cabinet members engaged in a detailed discussion about principles of shared decision-making. Their observations are shared here and should be considered as guidelines or parameters for implementation planning of this and other strategic directions.

How decisions are made

- Move from opinion-based to analysis and information-based decision-making
- Need diagnosis before prescription
- More time must be taken for decisions
- Need different conversations earlier
- Emphasis should be on collaboration, critical questioning, and sharing of ideas - not consensus.
- Delineate the boundaries of shared decision-making
- Set up rules and then stick to them

Who is involved in decision-making

- There needs to be a framework and a recognition that not everyone has to be in on every decision
- People impacted by a decision should be at the table
- The College Council could be used more effectively

Communication

- The Public Information Officer will help with communication issues
- Wide variety of communication modes
- Leadership must listen and give feedback
- Look at how structures and processes need to change to improve communication
- Transparency needs to begin with the Executive Cabinet group before it can be achieved across the organization
- Don't protect each other – talk openly

Principles

- Players need to support decisions even if they disagree, once a decision has been made (by division, classification, important constituencies)
- Accepting "no"
- Shared decision making should be about shared opportunities and shared responsibilities
- There must be loyalty to the group and to the absent

Barriers

- Need to first honestly own the history of the school, then we can embrace change
- Need to change blaming behavior into problem solving
- Needs to have a common/consistent message coming from the Executive Cabinet
- Emphasis has been on the role of the individual. Need processes that take people beyond their own self-interest
- Trust is essential to honest participation. Cannot collaborate without trust
- Must be respect for different learning styles
- Sometimes there isn't time for shared decision-making, and some issues do not lend themselves to shared decision-making
- Need respect for individual preferences for gathering, processing, and disseminating information

Schedule

(as we know it now)

	Implementation Planning	Budget Development
October, 2007	– action team training – action teams begin work	
November - December	– action teams continue their work – progress updates to Executive Cabinet	
January, 2008	– action teams make revisions to Plans based on guidance from Cabinet – all action teams have completed their implementation plans – implementation plans compiled into single document	– budget implications are summarized in one document for early review by Executive Cabinet – executive leadership provides guidance on further priority-setting, given budget constraints
February	– one day retreat to review, share, and integrate action plans. All teams, advisors, and leadership participate – integrated strategic plan/action plan document goes to Budget Advisory Group (membership = Team Chairs)	– Budget office establishes a chart of accounts for the strategic plan to help divisions link budgets to plan – Budget Advisory Committee (made up of Action Teams Chairs) is convened
March - May		– budget is developed
June		– Trustees 2008-2009 Budget Review

Getting Into Runes

- On Monday, October 15th, you'll receive an email with a username, password, and a link to Runes.
- Once you are at the site, bookmark it, so you won't have to type in the address every time you visit.
- Across the top of the dashboard, you'll see 7 tabs: (Overview, Messages, To-Do, Milestones, Writeboards, Chat, and Files)
- You can experiment with all the functions, but the the four you'll definitely use for this project are:
    - overview,
    - messages,
    - milestones, and
    - files

Using Runes: Overview Tab

- The project overview page gives you an at-a-glance view of all activity within the project.
- At the top of the page, you'll see the project name. Below that is a row of white tabs, one for each function.
- Below the tabs are a series of red, underlined links ("new message" "new to do list" "new milestone" and "new file.") One way to add a new item to the project is to click one of these links.
- Below the red links, you'll see a calendar with all the milestones for the project.
- Below that calendar, you'll see a chronological list of all the messages, milestones, and files that have been posted. Next to each item in the list, you can see the name of the person who posted the message or uploaded the file.
- In the project activity list, you'll also see items called "comment" - these are responses people have made to a message. (If the original message had the title "Plans for Friday," you'll notice the topic line of all related comments reads "re: plans for Friday.")
- To read any of the messages, comments, or files, click on the blue, underlined title.
- In the grey, right hand column, you'll see a list of the people who have access to the project, and below each name it shows when they last logged in.

Using Runes: Messages Tab

- When you click on the message tab, you'll see a chronological list of all the messages which have been posted on all topics.

- In the grey column on the far right, you'll see a list of the categories which have been set up to cluster the messages around topics. If you want to see only the messages related to a particular topic (like "Student Success"), click the name of the category.

- Below each message, it indicates who posted the message, what category they put it in, and how many comments have been made related to that message.

- You can think of each message as the first link in a whole chain of discussion on the topic of the message. If you want to contribute to that discussion, you'll want to add a comment to the message rather than posting a new message.

- To post a new message, click on the "post a new message" button with the green + sign. The button is at the top of the grey bar on the right.

- When you click "post a new message," you'll go to a screen where you can enter a title for your message, assign it to a topic category, and enter the text of your message. You can also attach a file to the message, and choose who you want to receive an email notice of your message.

Using Runes: Milestones Tab

- When you click on the milestones tab, you'll see a calendar with all upcoming milestones on it.
- Above the calendar will appear a list of milestones which have passed.
- Below the calendar, you'll see a list of upcoming milestones.
- To enter a new milestone, click on the "add a new milestone" button with the green + sign at the top of the grey right hand column.
- Click on the calendar date when you want to add a meeting date, deadline, or other scheduled event. Then, type the description of the milestone in the space under the calendar. Choose a responsible person from the drop down menu and then click 'create milestone.'
- ***We encourage you to put meeting dates and team deadlines on the milestone calendar so they are visible to everyone.***

Using Runes: Files Tab

- When you click on the files tab, you'll see a chronological list of all the documents which have been posted on all topics. (In the right hand grey column, there's a button you can check to see the list in alpha order instead.)
- This list of documents will include: All documents that have been attached to messages AND all files that have been posted directly to files without an associated message.
- In the grey column on the far right, you'll see a list of the categories which have been set up to cluster the files around topics. If you want to see only the documents related to a particular topic (like "Meeting Notes"), click the name of the category.
- One category that is already set up for you is called "workplan templates." Here, you'll find a blank template for each strategic direction. You'll want to download these templates and use them to capture your meeting notes as well as your final implementation plans.
- ***After each meeting of your team***, the team chair should go to the files tab, and click on the "upload a file" button with the green + sign at the top of the right hand column of the page.
- In the Upload file screen, click on the "choose file" button, then attach your meeting notes document from your drive. Assign your document to the "meeting notes" category (in the drop down category menu). Then, click "upload the file" and it will appear in the list of documents.

Important Runes Etiquette

In order to keep our Runes workspace tidy and easy to use, please pay careful attention to the following rules of the road:

- **When should I post a new message and when should I post a comment?**
  - *Post a new message* when you are initiating a brand new topic.
  - *Post a comment* if you are contributing to an ongoing conversation within an existing topic area.
- **When should I post a document to "files" and when should I attach a document to a message?**
  - *Attach a document to a message* if you have a working document you want to share with your team. (It will automatically be saved to "files", but will not be assigned to a "file" category.)
  - *Attach your document directly to "Files"* if it is a resource you think will be helpful to many action teams, or if it is a "Final" product, like meeting notes, or final workplans.

PART III

TODAY'S ACTIVITIES

Activity 1: Planning for Hawaii

Desired Result	**Measures/Criteria and Targets:** *What will you measure to know you've succeeded? Are there targets you'd like to hit along the way to indicate movement in the right direction?*
By 2012, my team members and I will co-own a home in Hawaii.	

Action Steps: *What activities will need to occur to achieve this desired result? In what order?*	**Time Frame:** *When will this step start? When will it finish?*	**Responsible Person(s):** *Who should take the lead to make this step happen?*	**Stakeholders to Inform** *Who will need to be in the loop?*	**Stakeholders to Involve** *Who will need to participate?*	**Important Considerations:** *What kinds of things will impact your ability to complete each step?*

Activity 1: Planning for Hawaii

Budget Implications		
	Specific Resource Needs	Suggestions for Funding Sources
People, energy, and time: *Who in and outside your team will be needed to help? How much of their time will you need?*		
Technology, materials, equipment, tools: *What tangible resources will you need? Information? Equipment? Software?*		
Space: *Will you need any dedicated space for this goal?*		
Other: *What else will help achieve your desired result? Cash?*		

Agenda
First Team Meeting - Oct 12

- Review the Strategic Direction & assure that you have a shared understanding of it.
- Review Guidelines for your Strategic Direction & identify any questions you may have.
- Set a team meeting schedule and preliminary work plan.

Team Schedule Worksheet

Meeting Date, Time, Place	Topic(s)