

1. PEOPLE MANAGEMENT

2. PROJECT PREPARATION

3. PROBLEM UNDERSTANDING AND DEFINITION

4. SOLUTION EXPLORATION AND DESIGN

5. IMPLEMENTATION

6. WRAP-UP

Mid-level Leaders' Community of Users Workshop

Final Report

Dec 6, 2023

EPISTEME for Moore Philanthropy



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Institutional Transformation



Transformation is the realignment of an institution's structures, culture, and business model to create a student experience that results in dramatic and equitable increases in outcomes and educational value.

Institutions transform by integrating evidence-based practices that create coherent learning environments and leveraging a mission, catalytic leadership, strategic data use, and a robust continuous improvement process.

Timeline of Investments in Transformation

The Guide for Postsecondary CHANGEMAKERS



<https://frontierset.org/>
FRONTIERSET



<https://www.completionbydesign.org/>



<https://postsecondaryita.org/>
Postsecondary ITA



OVERVIEW + CONTEXT

Equity + Design

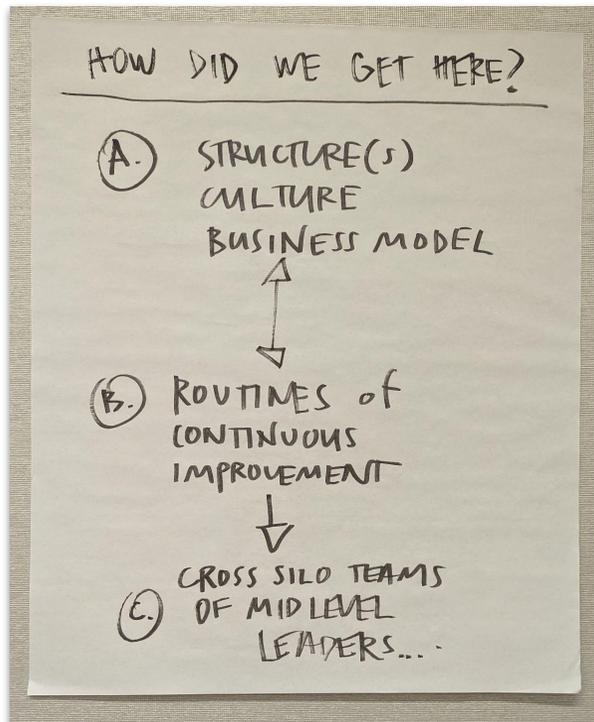
“The problem comes when there's a mismatch between the stated purpose of the design and the reality of who can use it. When a solution is meant to serve any member of society, and then doesn't, the effects of exclusion can be negative. The experience can feel like rejection from society itself, especially in the shared physical and digital spaces where we learn, work, share, heal, advocate, create, and communicate. There is a risk that exclusion will become more prevalent as technology moves into every area of our lives. Because interactions that were once human to human, are now facilitated by machines. Every human interaction that includes technology gains a wildcard, who will it reject, and who it will accept.”

- **Kat Holmes, *Mismatch: How Inclusion Shapes Design***

How We Got Here: Broader Context

Overall Objective

To drive institutional transformation through the **development of public goods** that can facilitate Mid-level Leaders' (MLLs) Equity-Centered Student Success (ECSS) efforts



Overview

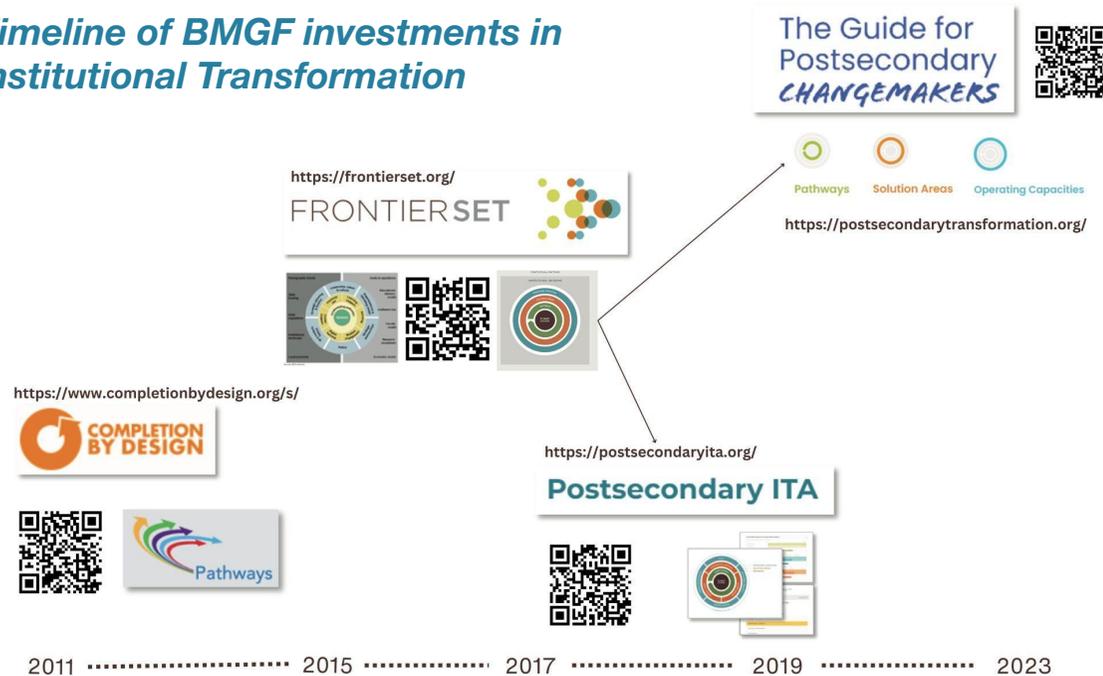
- **Institutional Transformation** is the realignment of an institution's structure, culture and business model to create a student experience that results in dramatic and equitable increases in outcomes and educational value.
- Institutions transform by **integrating evidence-based practices that create inclusive and coherent learning environments** by leveraging student-centered mission, catalytic leadership, strategic data use, and strategic finance in a robust continuous improvement process.
- BMGF's hypothesis is that **the practice of ECSS happens in the middle of the institution and is the major driving factor for continuous improvement** to support student success and remove attainment gaps (I-I-I Framework)
- **Centering MLLs in cross-institutional collaboration:** This BMGF investment is aimed at supporting those who do the work in a way that allows everyone to benefit, despite institutional capacity and resources.
- BMGF aims to develop tools for cross-functional teams to take non-theoretical action, address practical challenges, and eliminate unproductive struggle through shared information and validation.
- Participating institutions differ; the purpose is to co-create tools that are generic enough to address ~90% of common challenges.

How We Got Here: Broader Context

Overall Objective

To drive institutional transformation through the **development of public goods** that can facilitate Mid-level Leaders' (MLLs) Equity-Centered Student Success (ECSS) efforts

Timeline of BMGF investments in Institutional Transformation



BMGF investments that have been validated with the field and offer publicly available resources:

- **Completion by Design**
 - Loss-Momentum Framework
- **Frontier Set**
 - PRPAM (Continuous Improvement)
 - ITA (Reflection + Sensemaking)
- **Changemakers Website**

Our MLL research project + Community of Users Workshop



How We Got Here: MLL Research Project

Research Focus

Organizational and administrative practices for and challenges to advancing ECSS work



From Insights to Innovation Briefs for Challenges of Practice

1. Reviewed prior BMGF work and other research on student success, equity in higher ed, MLLs, and organizational behavior

2. Conducted **33** interviews with MLLs from **16** institutions and collected ECSS-related materials

3. Bottom-up analysis of interviews and materials to identify emerging themes, shared needs, solution strategies, and pain points across institutions

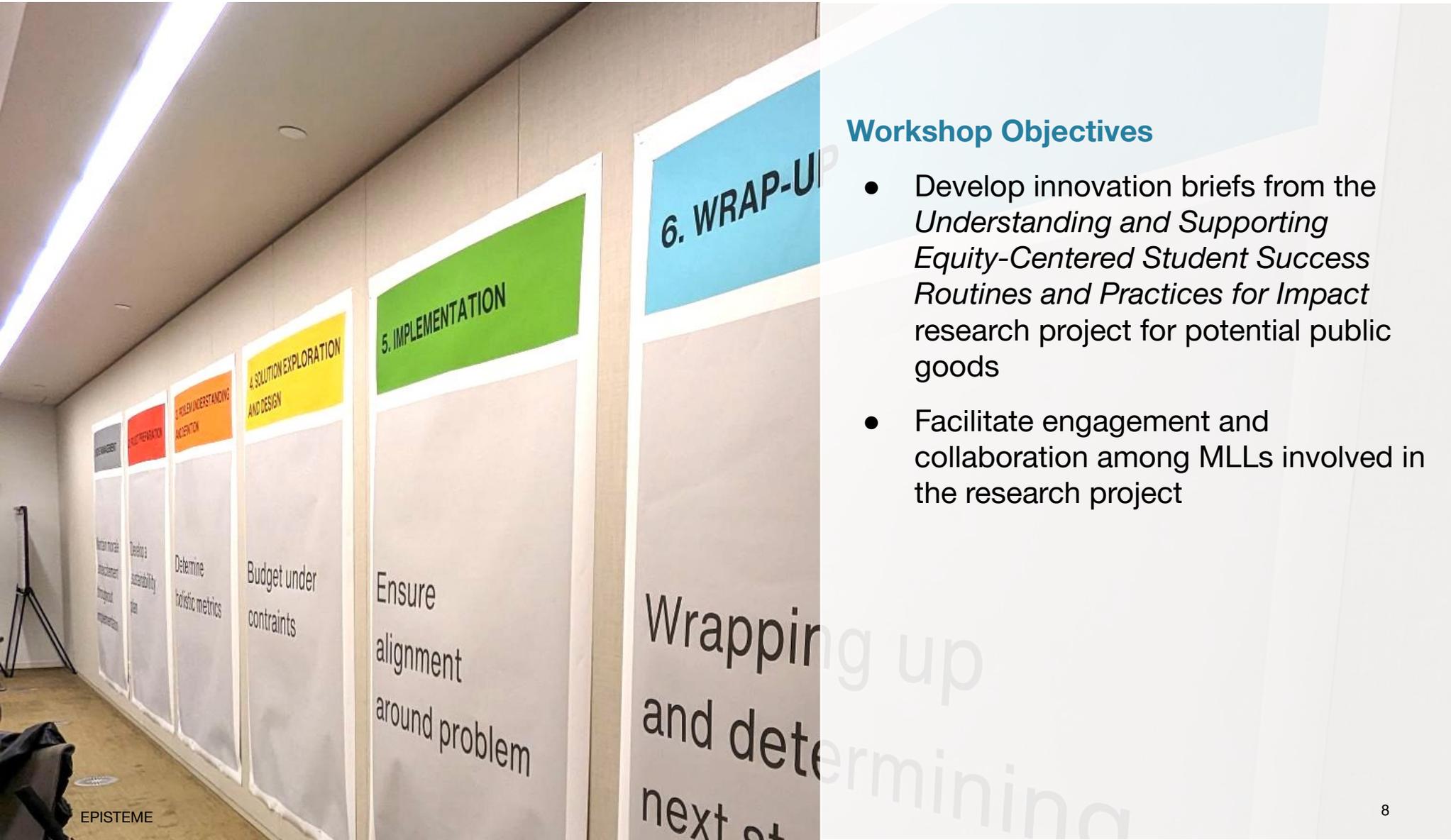
4. Developed 80-question survey for an expanded pool of MLLs to refine insights and identify insights-driven opportunities for investment

5. Prioritized opportunities by potential impact and feasibility based on participants' feedback captured in a follow-up survey and BMGF input

6. Streamlined prioritized opportunities into 3 Opportunity Areas:
1) Initiative Operations, 2) Understanding Students, and 3) Faculty Buy-in

7. We discussed all three opportunity areas over the course of the Community of Users workshop at BMGF (November 1-3), but initiative operations provided our core design challenge. We tackled the 6 thorniest challenges of practice across the initiative life cycle as identified by study participants.

Where We Are: MLL Community of Users Workshop



Workshop Objectives

- Develop innovation briefs from the *Understanding and Supporting Equity-Centered Student Success Routines and Practices for Impact* research project for potential public goods
- Facilitate engagement and collaboration among MLLs involved in the research project



WORKSHOP PARTICIPANTS

Workshop Participants



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GENERAL TAKEAWAYS + REFLECTIONS

General Reflections

Training MLLs

Participants expressed a strong desire for mid-level leader training for the unique challenges of the role(s). The general sentiment was that MLL training is a great philanthropic investment that would have clear and deep impact without having to underwrite campus operations (which brings risk if not institutionalized).

Effective communication and collaboration in higher education

Shared investment is shared reward; facilitating a culture of resource-sharing and strategic cross-functional communication ensures that “we're all making a strategic bet.”

What to do about the constant churn at the top?

Frequent leadership changes means institutional priorities often reset or shift with a new president's priorities. MLLs must design for that reality and build flexibility and resilience into ECSS initiatives to future proof them in an environment where the sands and political winds are almost guaranteed to change.

Clarity around dependencies and considerations

Success across an initiative lifecycle requires attention to local processes, dynamics and conditions for meaningful impact as well as the linkages across phases in the cycle.

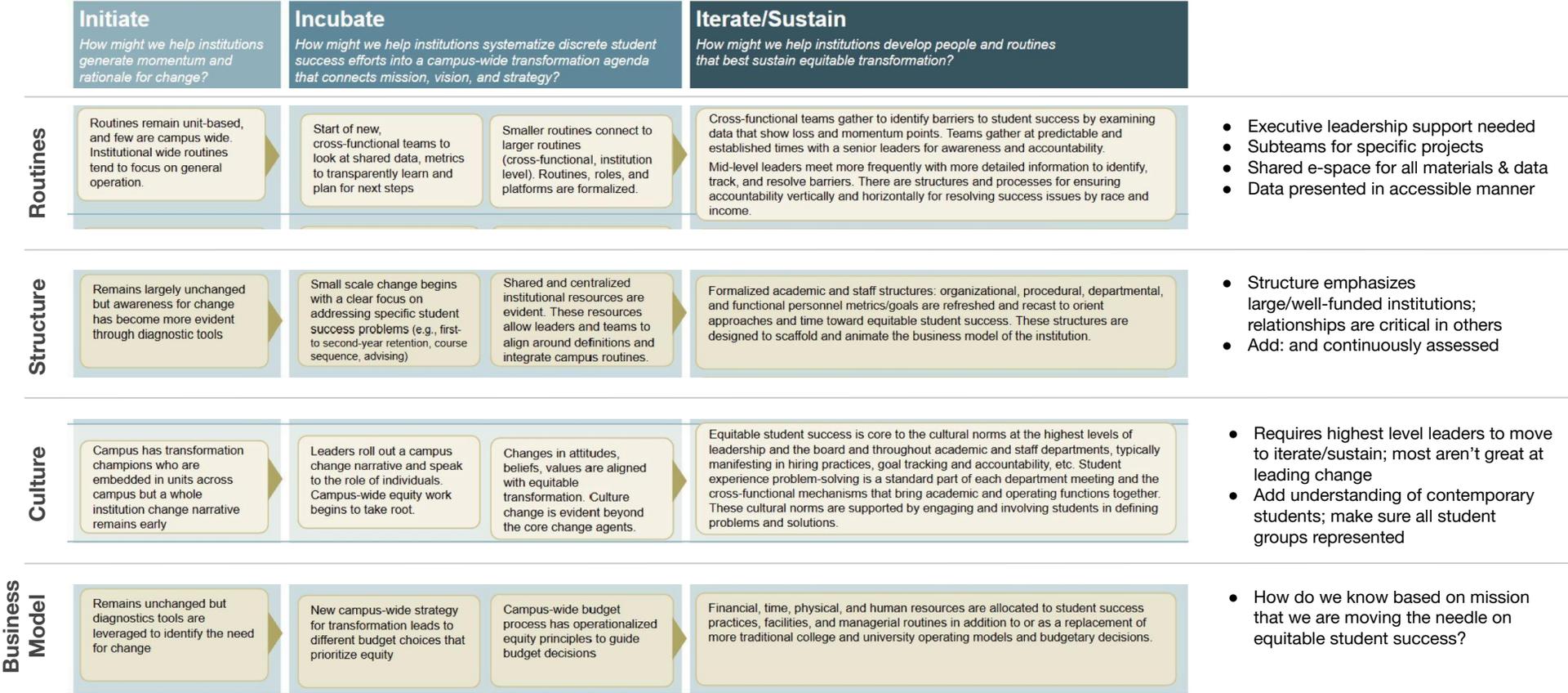
- *“I think for each of these [stages], we need problem dependencies... these are all linked together, [so they should be thought about in the context of the] broader framework.”*

Improving university meetings and decision-making processes

- Student success planning and strategy meetings should include business and finance, IT, and/or other critical partners or stakeholders so these functions can understand the realities of academic affairs, student affairs, enrollment management work, needs, etc.
- Clearly outline who's responsible, accountable, consulted and informed ([RACI chart](#)) and when communications with them need to occur; everyone likely doesn't need to attend every meeting.
- Managing meeting structure allows for having the right people with the right lenses to be in the room at the right time, facilitating more efficient decision-making, more streamlined communication, and more significant impacts.

Reflections on the Initiate-Incubate-Iterate Framework

This framework was developed by BMGF as a tool for assessing institutional maturity in key transformation areas that drive continuous improvement in support of equitable student success. Workshop participants indirectly tested the framework during the research phase of the project; during the workshop, they had the opportunity to provide feedback on it directly.



Post-ideation Sensory Reflection



What participants saw

- A lot of optimism - despite some common problems, there is a solution on the horizon
- No matter the size of the institution or the populations served, there are common challenges
- Bonding, teamwork, motivation, and encouragement a sense that *"We're all in this together and we can do it"*



What participants heard

- The freedom and the opportunity provided by the workshop *"It was a positive sound, we don't really have the time and the opportunity to really think through [these types] of things... It is a relief to be able to do this."*
- A sense of camaraderie and agreement on a lot of things, especially when folks thought they weren't seeing eye to eye. Participants were able to talk through those moments productively.



How participants felt

- That people were thinking - it was very intentional and purposeful
- That we made progress on addressing these issues
- Disheartened from learning about the constraints colleagues experience at their institutions, especially because participating institutions are those responsible for educating students that comprise the majority of what America is going to look like in the future
- If we don't keep fighting, then who will be here doing the work? It can be a hard thing to process.



What left a bad taste

- Cultural and political realities limit the ways in which participants can help students who need it the most
- *"Even when we're innovating, we're so far behind."*

Post-ideation Sensory Reflection



What smelled bad

- The realization that funding is not equitable, people are doing as much as they can in systems that are extremely underfunded, and how difficult it can be to build morale and encourage folks given these circumstances
- It's hard to get the right people at the table. For example, when thinking about resources, discussions often include student affairs and faculty, but not the business office, IT, or HR colleagues. This becomes a heavy lift because they have to be brought up to speed, then requests have to be justified and formatted to align with their processes, often pushing the work outside of anticipated timelines and slowing progress. *"It's exhausting."*



What made participants want to move, take action

- The need for competency development to outline what's necessary to move the needle; there is no real intention in developing competencies amongst MLLs, skills are gained "through osmosis" and experience
 - It's motivating because if competencies are enhanced, perhaps the work becomes easier
- More willing to step into difficult spaces and say the difficult thing; to place oneself into those spaces intentionally, rather than responding or waiting for issues to arrive
- The enthusiasm and the reality check; walking away feeling very empowered
- Positioning for the future and challenges to move towards reframing; how to build more trust, build coalitions, move forward with intentionality to pull desired futures closer to reality
- The dynamics of an adversarial future don't have to stop the work. Maintaining optimism requires constant reframing as an exercise that you practice regularly with others
- The need for diverse leadership; it makes a difference

Faculty Buy-IN

Faculty will be actively participating in Strategy as well as evaluation & improvement.

Adapt to student needs

- Training how we prepare ourselves students for future faculty careers.

Faculty evaluated on ECSS goals feel safe to learn (instead of shaming & initiatives)

Faculty buy-in if we utilize opportunity that projects via retrospectives and performance programs

INITIATIVE OPS

FUTURING AROUND OPPORTUNITY AREAS

IF EVERYONE WORKS TOGETHER THE PLAN IS TO FIND A CLEAR TIME BY THE WILL OF

do not fight their various common goals

focused incentivised

questioning our approaches - Centrally - quality for

Understanding Students

Not only do we know them we center the institution around them

Students will more intentional stakeholders in the decision-making process.

fac work engage ourselves w/ students and

advancements in AI and other technology - not enough cycles if don't roll out a couple of days

Our practices to what our students need...

Opportunity Areas Overview



INITIATIVE OPERATIONS

MLLs are empowered to run ECSS initiatives and face shared operational challenges. However, there is no go-to toolkit to address key challenges across the initiative lifecycle. We focused on this opportunity in the Community of Users Workshop because the solution space is primarily tactical, there is a clear and immediate fit for BMGF/Moore/Humanitae public goods, and because prototypes can be developed relatively quickly.



UNDERSTANDING STUDENTS

There are a range of tools and methods that MLLs use to identify and address student needs. However, MLLs are eager for more nuanced, robust knowledge of their students to design more effective ECSS infrastructure and interventions. They also see institutional stakeholders' misunderstanding of students as a barrier to their work. Closing these gaps in knowledge and understanding is the focus of this opportunity, which centers on student data and stakeholder education and persuasion.



FACULTY BUY-IN

Faculty are *the* essential interface with the institution for students— and consequently are critical for achieving equitable outcomes. Without deep faculty engagement, ECSS efforts may only touch the margins of the student experience and have limited impact. However, institutions & MLLs struggle with faculty resistance to ECSS efforts and need help building faculty-buy in and mitigating faculty intransigence to facilitate their work.

Futuring Activities

Where Do You Stand?
Instructions

When you think about the future, where do you stand?

Add a sticky note where you stand:
(Y-axis) Do you see things as getting better or worse?
(X-axis) How capable do you feel of personally affecting the future?

Better (Sun icon) / **Worse** (Sun with rain icon)
Less Agency (Person with gear icon) / **More Agency** (Person with gear and sun icon)

Things are good and getting better. We can't do anything about it but why worry? Things are OK!

Things are good and getting better. BUT we can act to make things even better.

Things are getting much worse, opportunities might be rising and there is nothing we can do about it!

Things are getting worse and an apocalypse may be coming. BUT we can act to change things for the better and avert disaster.

Activity 1: Where Do You Stand?

This activity allowed teams to assess their individual and collective worldviews about the future using the dimensions of optimism and perceived agency in the future. Participants were asked to reflect upon the two opportunity areas that were not covered in the workshop (Understanding Students and Faculty Buy-in).

Scenario-Strategy Matrix
Instructions

1. Reflect upon the opportunity areas that have been outlined. How might each show up in each future scenario?
2. Assign a purple, yellow, or blue sticky note in each cell.

This strategy or concept will hold true in this world.
This strategy or concept will not hold true in this world.
This strategy or concept may or may not hold true in this world, as you determine.

	Transformative Future	Contemporary Future	Adversarial Future
Initiative Operations	Evaluation	Evaluation	Evaluation
Faculty Buy-in	Evaluation	Evaluation	Evaluation
Understanding Students	Evaluation	Evaluation	Evaluation
Other?	Evaluation	Evaluation	Evaluation

Activity 2: Scenario-Strategy Matrix

Participants outlined positive (transformative), neutral (contemporary), or negative (adversarial) futures for all three opportunity areas.

Futuring around Faculty Buy-in



+

Transformative

- Active and compassionate engagement from faculty in all ECSS processes and inclusion of an evaluation metric that assesses involvement in SS initiatives
- Transformation in approaches to graduate preparation for faculty careers

=

Contemporary

- Faculty will comply with standard requirements as tenured faculty cycle out; “good” faculty will burnout and the faculty vs. admin divide will continue
- Stagnation in approaches to ECSS will reify status quo: *"Everything is good."*

-

Adversarial

- Unexamined faculty buy-in systems will be available but silos exist due to fear of repercussions and resistance to change
- Influence of external entities (political); understanding the interplay of buy-in with broader policies and board/state dynamics
- Coalition building against a common adversary may help build buy-in



Where Do You Stand? Participants generally felt that things are getting worse regarding faculty buy-in.

Futuring around Understanding Students



Transformative

- Institution design that centers students and adapts practices to student needs
- Students as intentional stakeholders in the decision-making process
- Tech advancements that support complex systems of data collection + corresponding competency development



Contemporary

- Progress in national discourse; i.e., basic needs, FAFSA, student loans
- We will continue to help some students and ignore others
- Institutions will be sites for contained conflict amongst stakeholders; students will not allow institutions to continue ignoring feedback and begin actively resisting



Adversarial

- Systemic assumptions will gain momentum and active resistance will proliferate
- Political landscapes may not allow us to understand & act to better support students
- No adaptation to student needs, particularly those of adult learners



Where Do You Stand? *Participants felt that things are good and getting better when considering the future of understanding students and felt that they had moderately high agency to continue making things better.*

Futuring around Initiative Operations



+

Transformative

- Standardized clarity around initiative purpose, approach, and solution
- Culture of open collaboration, sharing, and incentivization
- Processes for reflection, review, and continuous improvement
- Tech advancements that support complex systems of data collection + corresponding competency development

=

Contemporary

- Stagnation in approaches to ECSS will reify status quo: *"Everything is good."*
- Siloing will continue; good work will occur at the margins but won't be integrated and there will be minimal change and high burnout

-

Adversarial

- People will be exhausted because there are TOO MANY INITIATIVES; no focus on transformation
- Fragmented work, budget limitations, lack of cohesion
- Continued evaluation but no utilization of results to inform approaches

Targeting Initiative Operations to Support MLLs' ECSS Work

This was the core design challenge for the MLL workshop. We focused on addressing the **6 thorniest challenges of practice** as identified by our research study participants across the initiative life cycle.

PEOPLE MANAGEMENT

Maintain morale and excitement throughout implementation

How do you maintain team morale and excitement throughout the length of an initiative? How do you deal with political friction, multiple commitments, rapid change, burnout, and other challenges?

PROJECT PREPARATION

Develop a sustainability plan

Planning ahead: What will happen after the initiative ends? How do we make sure its impact persists?

PROBLEM UNDERSTANDING & DEFINITION

Determine holistic metrics

How do you determine appropriate and holistic metrics for assessing outcomes?

SOLUTION EXPLORATION & DESIGN

Budget under constraints

How do you budget for an initiative in a resource-constrained setting?

IMPLEMENTATION

Ensure alignment around problem

How do you ensure alignment around the problem and intended outcomes throughout the initiative's life?

WRAP-UP

Wrap up and determine next steps

What do you do to close out an initiative? What needs to happen to ensure its impact is institutionalized?

Key Challenges of Practice

We developed an **innovation brief*** for each challenge of practice to structure participants' solutioning and ideation.

1. PEOPLE MANAGEMENT: MAINTAIN MORALE & EXCITEMENT
How do you maintain team morale and excitement throughout the length of an initiative? How do you deal with political friction, multiple commitments, rapid change, burnout, and other challenges?

How to achieve clarity around team purpose, goals, and roles? <i>How can team leaders maintain high energy and excitement throughout an initiative?</i>	How to establish clear and agreed upon norms and standards for the team?	What should an intra-team communications plan include or consider?	Equity considerations
What could intentional recognition, appreciation, and celebration of team members look like?	How to address and mitigate burnout?	How to navigate institutional politics?	Faculty considerations
How to facilitate a sense of empowerment amongst the team?	How to foster collaboration?	And...	Student considerations

INNOVATION BRIEF

2. PROJECT PREPARATION: DEVELOP A SUSTAINABILITY PLAN
Planning ahead: What will happen after the initiative ends? How do we make sure its impact persists?

Succession planning <i>Workflow integration; demonstrating fit into existing institutional processes, policies, and technologies; identifying personnel who will own the follow up or next steps after an initiative ends</i>	How to project an initiative's potential return on investment?	How to ensure initiative alignment with larger strategic goals of the institution?	Equity considerations
How to assess environmental (internal and external) support in the short- and long-term?	Funding <i>How to determine what continued financial support will be needed for the initiative to become institutionalized practice, and how to identify funding sources?</i>	Stakeholder engagement planning <i>Who to engage with and how at the close of an initiative to ensure sustainability?</i>	Faculty considerations
Expertise and training needed <i>What expertise and training will be needed to sustain the afterlife of the initiative?</i>	Organizational readiness/capacity <i>How to determine needed external supports and resources to institutionalize effective practice?</i>	And...	Student considerations

INNOVATION BRIEF

3. PROBLEM DEF & UNDERSTANDING: DETERMINE HOLISTIC METRICS
How do you determine appropriate and holistic metrics for assessing outcomes?

How to describe the problem in terms of measurable outcomes?	How to identify relevant metrics for a holistic view of the problem?	Equity considerations	
Requesting and collecting data <i>What data request and collection processes are needed to support and advance an initiative?</i>	How to identify data analysis capacity/support needed?	How to determine how data will be used and when it is needed?	Faculty considerations
How to link metrics to institutional return on investment?	And...	Student considerations	

INNOVATION BRIEF

4. SOLUTION EXPLORATION & DESIGN: BUDGET UNDER CONSTRAINTS
How do you budget for an initiative in a resource-constrained setting?

Opportunity set <i>How to determine options for service/intervention that can be afforded for an initiative given budgetary limitations?</i>	Opportunity cost <i>What must be given up in exchange for what's needed/desired for an initiative?</i>	Equity considerations
Marginal analysis <i>How to compare the benefits and costs of choosing a little more or a little less of a resource, method, or approach that an initiative uses?</i>	Sunk costs <i>How to leverage or consider costs that have occurred in past initiatives or incurred towards the problem that cannot be recouped/recovered?</i>	Faculty considerations
Utility <i>How to value the satisfaction, usefulness, or impact of an initiative in financial terms?</i>	And...	Student considerations

INNOVATION BRIEF

5. IMPLEMENTATION: ENSURE ALIGNMENT AROUND PROBLEM
How do you ensure alignment around the problem and intended outcomes throughout the initiative's life?

How to maintain clarity of purpose and outcomes?	How to ensure common understanding among the key project stakeholders?	How to ensure clarity in roles and responsibilities?	Equity considerations
How to conduct regular evaluation of team needs and composition to ensure that the appropriate skill sets are in the room, etc.?	How to equip team and ensure team access to critical knowledge and data?	How to clarify the relation of an initiative to larger strategic objectives and other institutional efforts?	Faculty considerations
How to manage conflicting priorities with transparency?	Methods for tracking progress and cost?	And...	Student considerations

INNOVATION BRIEF

6. WRAP-UP: WRAPPING UP AND DETERMINING NEXT STEPS
What do you do to close out an initiative? What needs to happen to ensure its impact is institutionalized?

Narrative <i>How to develop compelling and impactful narratives around an initiative's process, outcomes and/or insights?</i>	Insights and learnings <i>How to capture and formalize insights from the initiative?</i>	Equity considerations	
Dissemination and communications <i>How best to share important insights, lessons and findings from the initiative with relevant stakeholder groups?</i>	Reporting <i>How best to share important insights, lessons and findings from the initiative with relevant stakeholder groups?</i>	Memorializing <i>How to document and memorialize the initiative process for future reference?</i>	Faculty considerations
Determining next steps <i>How to make decisions around closing, extending or expanding an initiative?</i>	And...	Student considerations	

INNOVATION BRIEF

*An **innovation brief** is a blueprint or concrete set of guidelines and requirements for what to build to solve a key user challenge.

Process: 'Round Robin' Ideation Sprint to Develop Brief

Objective: Allow for collective input, group authorship, and ownership in the generation of solutions for the field. Teams inherited and built on each other's work to capture input across a broad range of experiences.

ROUND 1

Baseline strengths, challenges, opportunities, current strategies & optimal approaches for each innovation brief

Challenge of Practice #2: DEVELOP A SUSTAINABILITY PLAN

	Strengths	Challenges	Opportunities	Current Strategies	Optimal Approach
Succession planning					
Projecting ROI					
Initiative alignment with larger strategic goals of the institution					
Assessing environmental support					
Funding					
Stakeholder engagement					
Expertise and training needed					
Organizational readiness & capacity					

ROUND 2

Build on prior team's work to flesh out innovation brief + identify risks and constraints

Challenge of Practice #2: DEVELOP A SUSTAINABILITY PLAN

	Strengths	Challenges	Opportunities	Current Strategies	Optimal Approach
Succession planning					
Projecting ROI					
Initiative alignment with larger strategic goals of the institution					
Assessing environmental support					
Funding					
Stakeholder engagement					
Expertise and training needed					
Organizational readiness & capacity					

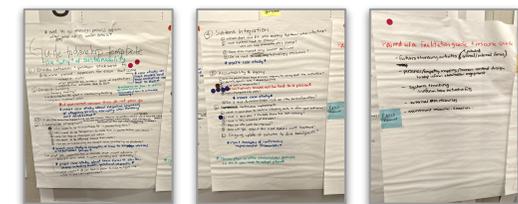
ROUND 3

1. Refine innovation brief

2. PROJECT PREPARATION: DEVELOP A SUSTAINABILITY PLAN
Planning ahead: What will happen after the initiative ends? How do we make sure its impact persists?

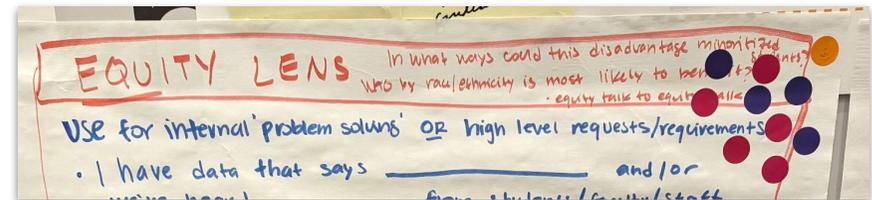
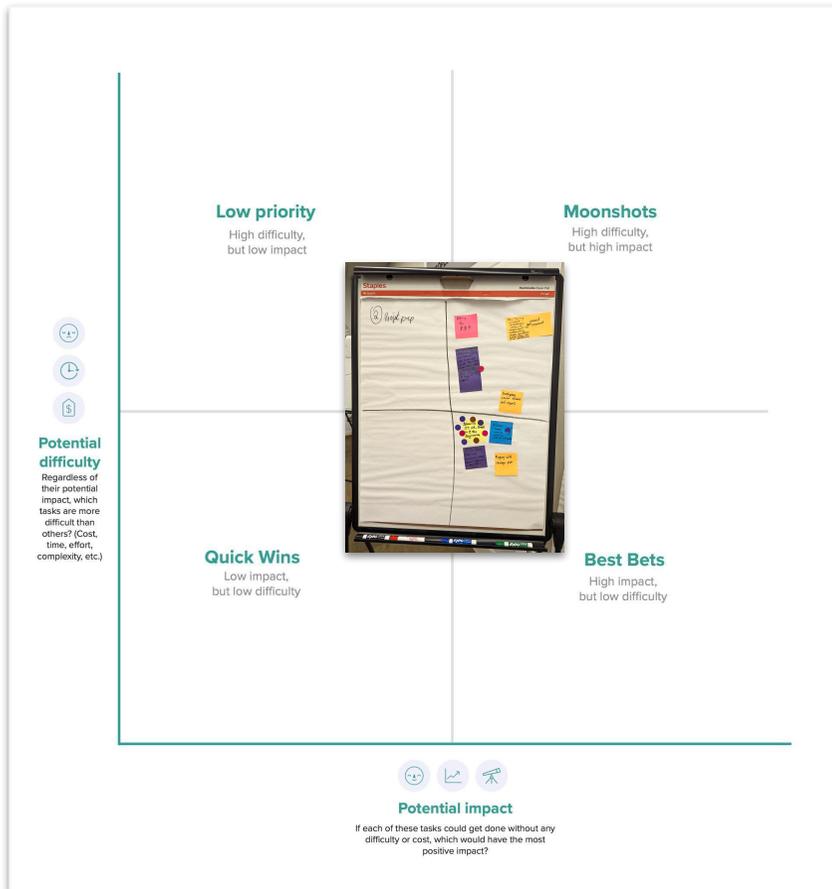
Succession planning	Projecting return on investment	Initiative alignment with larger strategic goals of the institution	Equity considerations
Assessing environmental support	Funding	Stakeholder engagement	Faculty considerations
Expertise and training needed	Organizational readiness/capacity	And...	Student considerations

2. Develop concept to address challenge



Process: Prioritization

- 1) Participants mapped ideas/concepts/points in a **potential difficulty/potential impact matrix**.
- 2) Participants were given **stickers to “spend”** to identify their most important ideas/concepts/points across all Challenges of Practice.



Challenge of Practice #1

MAINTAIN MORALE & EXCITEMENT

“Give your people something for doing the work that they're doing, and give it to them while they're in the midst of the work.”

1. PEOPLE MANAGEMENT

PEOPLE MANAGEMENT: MAINTAIN MORALE & EXCITEMENT

throughout
implementation

Key Takeaways

- It is difficult to maintain morale and excitement without **competent, passionate, courageous leadership that believes in the work**; leadership style must be in alignment with the problem being addressed.
- **Don't waste people's time.**
- **Developing a project charter and the use of other project management tools** eases the challenges associated with people management and helps to ensure clarity around purpose and approach.
- **Radical honesty and transparency** are key for trust building and buy-in; **cut the B.S.!**
- **Leverage the range of tech available on campus** to facilitate team engagement outside of formal meetings.
- **Status reports and data** help people see progress and that their work is having an impact.
- **Student success work shouldn't be presented or viewed as extra** but as an essential duty for all, **including faculty**.
- **Acknowledge the challenges caused by staff/leadership turnover and burnout** in the face of increasing asks/work.
- Appreciation and acknowledgment isn't the same for everyone; **know your people**.
- Reward doesn't always have to be monetary; **the gift of time can be one of the greatest gifts** one can receive (e.g., flex schedules, approval of time for research/personal development/interests).
- **Partnerships** are a great mitigation strategy for navigating institutional politics.

Group Ideation Summary

Equity Considerations

Minimize cultural taxation and tokenism; offer equitable reward systems and know your people to recognize them individually; have tough conversations at the start, don't tread lightly; don't assume everyone understands and/or agrees.

Student Considerations

Must be involved in project teams and compensated; flex schedules for student staff; provide services in alternative locations, meet students where they are to get them involved.

Faculty Considerations

Length of faculty contracts when asking for their involvement; do not frame this work as "extra" but as an essential/core duty; there is a perceived threat that anything "extra" asked of faculty is a stipend.

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Clarity around team purpose, goals, & roles	<ul style="list-style-type: none"> - Clear project charter at the start outlining purpose, problem, outcome, and milestones - Application process for strategic teams inclusive of naming problem and desired outcome 	<ul style="list-style-type: none"> - Same people, same roles - Uneven contribution to the team - Speak to the why 	<ul style="list-style-type: none"> - Establish rules/guidelines for selecting a team - Reduce acronyms, use clear language to ensure group clarity 	

Optimal Approach

- Identify stakeholders and replacements in case of turnover
- Use data
- Develop a clear vision that all can be part of
- Adapt to change
- Make it simple - purpose, goals, roles

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Leadership style and approach	<ul style="list-style-type: none"> - Radical honesty - Buy-in - Transparency 	<ul style="list-style-type: none"> - Cross-functional and cross-stratified (employee level) - Generational differences - Patriarchy 	<ul style="list-style-type: none"> - Be authentic; use strengths-based approaches - Cut. The. BS. 	<ul style="list-style-type: none"> - Someone must be in charge

Optimal Approach

<ul style="list-style-type: none"> - Validate - Know strengths and areas of growth for your team to match them to appropriate projects - Be adaptive, transformative - Bring people with you 	<ul style="list-style-type: none"> - <u>MUST</u> believe in goals - Transparency and communication - Introduce and empower team leads - Leadership styles aligned with type of problem
--	--

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Establishing clear, agreed upon norms & standards for the team	<ul style="list-style-type: none"> - Creating and revisiting team charter to highlight norms and standards 		<ul style="list-style-type: none"> - Team charters with integrated KPIs, objectives, and deliverables - Someone will retire soon 	

Optimal Approach

<ul style="list-style-type: none"> - Clear policy - Take procedures out of policy - Identify stakeholders and replacements in case of turnover

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Intra-team comms plan			<ul style="list-style-type: none"> - Summary communications throughout highlighting the good, bad, and, the ugly - Communicating through multiple modalities (e.g., F2F, chat platforms, webinars, video updates, etc.) 	

Optimal Approach

<ul style="list-style-type: none"> - Transparency and clear steps - Find the champions - Create a comms calendar and stick to it, use multi-channel approaches to reach multiple audiences - Include student voice - Partner with central comms
--

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Intentional recognition, appreciation, & celebration	<ul style="list-style-type: none"> - Year-end celebration 		<ul style="list-style-type: none"> - Including team members on published findings/work/presentations 	

Optimal Approach

<ul style="list-style-type: none"> - Nominate your people - Recognize scholarship on teaching and learning in faculty review - Recognize people have different ways they want to be appreciated - Development, training, awards, and money - Flex schedules and gift time without expectation of productivity and/or outcomes
--

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Addressing & mitigating burnout		<ul style="list-style-type: none"> - We continue to tap the same people; the doers do more - Eliminating initiatives that are not transformational or are no longer impactful - Finding and recognizing the work that has already been done - Budget issues 	<ul style="list-style-type: none"> - Stop doing things with little to no value - Accountability - Training and support around boundaries and prioritization - Staff sabbaticals (open time for research/interests) - Address compression in salaries - Get new people involved 	<ul style="list-style-type: none"> - Use multi-channel approaches to reach multiple audiences

Optimal Approach

<ul style="list-style-type: none"> - Post-tenure review - Acknowledge and recognize that it's occurring - Don't bring team together if there's a chance the initiative won't happen - Don't overload the same people and don't waste people's time - Cap % of time team can spend on other projects beyond their actual job - Engage broad stakeholder groups

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Navigating institutional politics	<ul style="list-style-type: none"> - Senior sponsorship from an administrator who battles "unproductive struggle" on behalf of the team 	<ul style="list-style-type: none"> - How do we know it's working? 	<ul style="list-style-type: none"> - Radical honesty - Find the line that crosses functional areas to reduce "turf wars" 	<ul style="list-style-type: none"> - Leverage faculty with power to say what needs to be heard

Optimal Approach

<ul style="list-style-type: none"> - Radical honesty - If senior admin is not in support, don't start the effort; find out early - Clear communication

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Facilitating a sense of empowerment amongst the team			<ul style="list-style-type: none"> - Finding ways to provide autonomy in calendars/schedules where possible 	

Optimal Approach

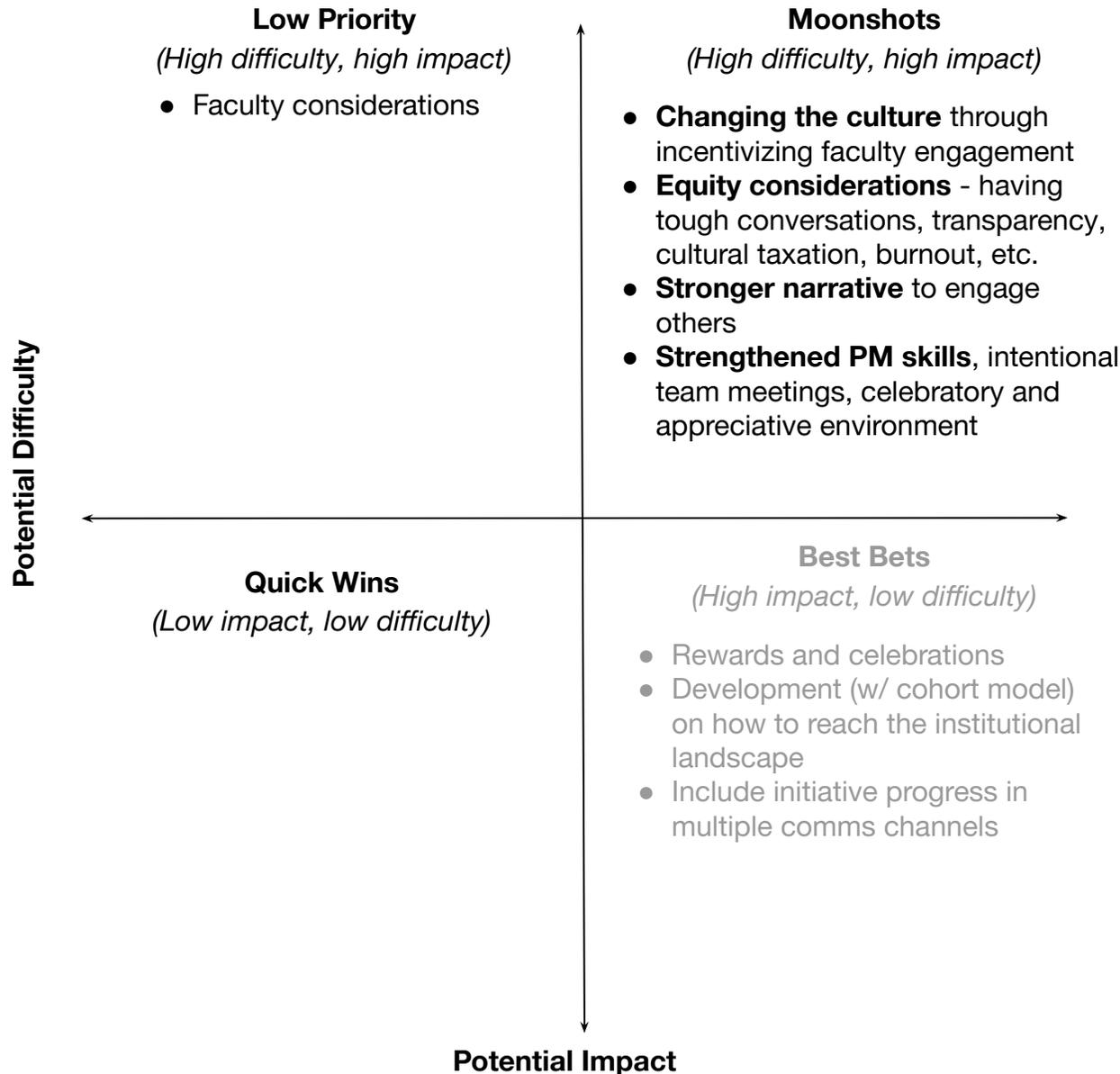
<ul style="list-style-type: none"> - Equity - Staff career ladders - Clearer expectations: Clarifying what success means - Intentional meetings and collaboration that demonstrate progress/progress check-ins
--

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Fostering collaboration		<ul style="list-style-type: none"> - Competing budgets - Duplicative work - Overextended workloads 	<ul style="list-style-type: none"> - Stopping the politics - Technology project management - Ending the blame game - Shared goals 	

Optimal Approach

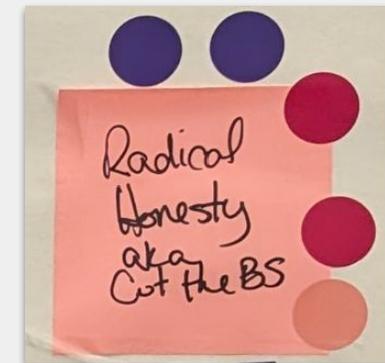
<ul style="list-style-type: none"> - Empower people - SMART goals - Transparency - Ensure all collaborators have same access to shared tech and train them - Make budget and IT part of team; add an "enemy" to find flaws early - Off-sites for sharing insights

Prioritization



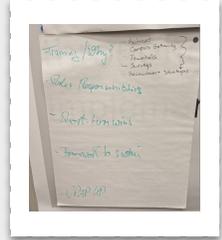
Most Critical Point

The need for radical honesty (aka, cut the BS).



What to Build

A People Management Guide



STEP 1. Who's in the Room?

Recruitment

- Ensure that the right people are in the right roles, enhancing overall team performance and productivity
- Intentionally shape team culture and dynamics, as well as the team's ability to adapt to changing demands and challenges.

Where to find team members

- Retreats
- Town halls
- Informal gatherings (food and booze)
- Brainstorming sessions
- Data bartering
- Institution events
- Meetings
- Just ask approach

Capturing information

- Surveys
- Information Cards
- QRs requesting contact
- Raffle

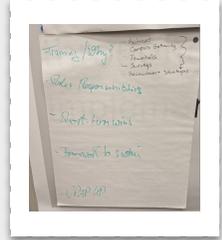
STEP 2. Framing - Project Purpose & Goals

Reflection questions are included to assist with developing a statement of purpose and goals for the project

- What is the event, initiative, workshop, etc.? (program description)
- When will it occur? (date, time)
- Where will the event be located? (physical location, virtual location)
- How will the event be delivered? (lecture style, roundtable, small group facilitation)
- Who is the target audience for the event? (populations invited to the event)
- What is the schedule/agenda for the event?
- Who is the project lead for the event? (person who will organize and execute event)
- What outcomes do I hope will be accomplished as a result of the event?
- How will I know whether the outcomes were achieved? (assessment of the event)

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STEP 2. Framing – Roles & Responsibilities

Guiding principles to follow when working in a team

- All team members should believe in the project goals and use these goals to guide their work.
- All team members should be authentic and radically honest while respecting other members of the team.
- Team lead must maintain transparent communication w/ team members & vice versa.
- Team should have clear outcomes.
- Team can create a charter or use an existing one. Team charters should integrate KPIs, objectives, and deliverables.
- Team should establish timelines and develop metrics to measure success.
- The team should use a strengths-based approach to the work.
- Team should be transformational yet adaptive.
- Team should consider ways to be cross-functional and cross-stratified.

A general template for outlining all roles and responsibilities

Executive Sponsor(s)

Executive sponsors are members of the upper Administration who have oversight of the project. They generally determine the budget and other resource allocation for the project.

Roles:

Responsibilities:

Team Leads

Leaders know the strengths and expertise of their team members. Leaders facilitate the project from conception to completion & empower their team members to do the work.

Roles:

Responsibilities:

Team Members

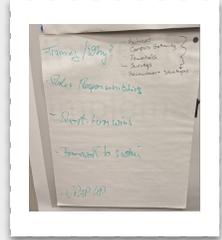
Team members should be matched to appropriate roles in the project based on their strengths and expertise. They use their expertise to carry out the objectives of the project.

Roles:

Responsibilities:

What to Build

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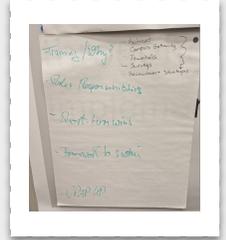


STEP 3. Early Stages & Picking up Momentum

- **Identify Champions** and empower these champions to speak on behalf of the team and their project responsibilities.
 - Develop activities and routines to foster relationship building among team members
 - Balance workload
- **Work the system/institutional politics:**
 - Identify a Cabinet sponsor
 - Build institutional buy-in for the project, champions, and team members
- Identify low-hanging fruits and a plan to disseminate the **short-term wins:**
 - Easy/moderate changes that lead to highly visible outcomes
 - Emphasize the contributions of key team members with a strong narrative around the student experience and institutional benefit
- **Communication plans** for sponsor, college community, intra-team:
 - Clear assessment metrics, always up-to-date, honest
 - Emphasize student outcomes/experiences (Maintain the “why”?)
 - Highlight and celebrate team members’ contributions
- **As a team leader:**
 - Invest heavily in capacity building, and individualized PD as appropriate to improve chances of success
 - Be ready to adapt style/project structure/responsibilities as the project might still be evolving
 - Invest in building trust and a sense of team belonging – team members need to feel safe when trying something new, making difficult decisions, and seeking advice.

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STEP 3. Early Stages and Picking up Momentum

Be on the lookout for:

- Bullshit and conflicts of interest/silos/personal agendas that could derail the project in the fragile stages
- Cross-functional projects are trickier than you think
- Generational, cultural, and other differences that will challenge the cohesiveness
- Your high achievers on the team are the most likely candidates for burnout and now they are engaging in a new project they believe in
- Your team members might speak different languages (silos)
- Your CFO will often have to deal with changing priorities
- Elements of the project that are obviously not working (Fail early!)

STEP 4. Framework to Sustain



Develop policies around (and build) the following items into recruitment and in the framework to sustain and maintain morale and excitement

- Staff sabbatical
- Flex scheduling
- Pay/compensation improvements



Rotating **team composition and team involvement**

- Spread the wealth/workload across people
- Encourage radical honesty
- Talent matching (place people in jobs that match their strengths and interests)

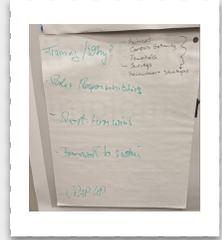


Centralized and ongoing **communications** that detail progress through newsletters, mass campus wide communications, etc.

- Incorporate validation mechanisms
- Implement rewards and recognition notifications

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STEP 5. Ending Strong & Moving Forward

Celebrating Outcomes and Contributions

Stakeholders should feel their value from beginning to end. Here are some ways to keep the celebrations going:

- Presentations at university or conference events
- Policy changes as a result of the work
- Publications
- Highlights on institution's web page and/or communications
- Recognition/awards event (institution or independent)
- Supplemental pay/stipend at project's completion
- Post-tenure review documentation
- CV updates
- Provide opportunity for growth within the institution
- Personalized cards and gifts

Sustaining Future Efforts

The work never truly ends. Utilize these strategies to continue being GREAT and to move the agenda forward:

- Debrief survey with results sent to stakeholders
- Provide mini grants for future research
- Highlights of student impact
- Self-care initiatives
- Faculty development (upskilling)
- Improved communication structure
- Data sharing and dashboards
- Food and booze
- Capacity building

2. PROJECT PREPARATION

3. PROBLEM AND DE

2. PROJECT PREPARATION: DEVELOP A SUSTAINABILITY PLAN

Planning ahead: What will happen after the initiative ends? How do we make sure its impact persists?

The flipchart content includes:

- Engagement:** "engagement ✓", "engagement with larger ✓", "of the institution"
- Equity considerations:** "Equity considerations", "also, gender", "diversity", "and 'success'"
- Faculty considerations:** "Faculty considerations", "Faculty", "considerations", "and equity", "Faculty", "considerations", "and equity", "Faculty", "considerations", "and equity"
- Student considerations:** "Student considerations", "Student", "considerations", "and equity", "Faculty", "considerations", "and equity", "Faculty", "considerations", "and equity"

Handwritten notes on the flipchart include:

- "through process again to confirm details?"
- "develop template sustainability"
- "problem statement to approach for each outcome"
- "case study on logic models and how initiatives can lead to lead-off"
- "if case study on logic models and how initiatives can lead to lead-off"
- "near-threshold do not pass go about negative aspects about handling"

3. PROBLEM D

How do you determine a

Describing the problem in terms

Staples

EQUITY LEA

USE for internal 'problem'

• I have data that we've heard

• I want to do

• Lets do this

How

Who

When

• What's doing it? Let's

• Did it work? I k

→ Student said

How can we improve

Let's stress the

a cross the

What do we need

Challenge of Practice #2

DEVELOP A SUSTAINABILITY PLAN

“The sustainability plan is probably one of the most important things to talk about at the beginning of the project, but then also to come back to at the end because if you're not constantly changing and you're not iterating and pivoting, we're really not doing what we're supposed to be doing.”

Key Takeaways

- **Sustainability planning should go after #3 Problem Definition** (or maybe even during/after Solution Design?). You can't plan for post-initiative until there is a clear sense of its shape and goal.
- The most critical takeaway was about **individual ownership of initiatives as an impediment to institutionalization and sustainability**. If an initiative is wedded to one person, its survival and impact are subject to that person's movements and imperatives (shifting roles, retirement, promotions, bandwidth, loss of interest, motivation, etc.).
- **If you can't foresee or make a funding plan for the initiative's future/afterlife, don't start it.**
- **Comfort with facilitation** is critical for MLLs, especially regarding cross-functional collaboration, but this skill set is never really taught or developed. MLLs need resources, training and tools to develop this muscle.
- **Tying the initiative to the institution's strategic plan** is critical for sustaining its impact after it runs its course/exhausts initial funding or allocated time.
- **Incorporate IT, HR, Budget and other relevant departments from the beginning** to plan for an initiative's longevity/afterlife.
- **Play chess, not checkers.** Understanding how to navigate different stakeholders and leverage political resources is critical for resource acquisition and to overcome stubborn barriers.
- **Assess duplication of effort** across the institution and **build on existing/related initiatives/programs/efforts.**
- **Determine criteria to trigger a stop** at the beginning. Be detached enough to sunset if needed.
- **Leverage technology** as a tool for planning.
- Keep front of mind: **How is the initiative responsive/responsible to the community?** What are we giving back?

Group Ideation Summary

Equity Considerations

It's critical to ask and map out the following explicitly: Does the initiative expand or support access and success for minoritized and/or marginalized students? How will this be maintained in the long-term/in the initiative's afterlife?

Student Considerations

Always include student voice and/or involve students directly (e.g. student government) in sustainability planning. Find ways to capture the voices of students who are not as involved on campus.

Faculty Considerations

Narratives for an initiative should always be informed by the audience's values. Determine what key faculty value when framing and crafting the story of the initiative.

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Succession planning	<ul style="list-style-type: none"> - Eliminates time needed to train new hires - Facilitates talent cultivation and retention 	<ul style="list-style-type: none"> - Salary equity - In-house opportunity - Determining who is responsible for creating, maintaining, and updating the plan 	<ul style="list-style-type: none"> - Developing a consortia of talent resources - Developing a succession plan for all employees - Succession planning allows active evaluation of the work, real-time enhancements and opportunities for improvement 	<ul style="list-style-type: none"> - Advisory board with key stakeholders

Optimal Approach

- Identify how to demonstrate success throughout the initiative to community and key stakeholders; build narratives for multiple stakeholders and identify large community to share initiative updates with
- Create shareable doc for plan via Google Docs or Microsoft One Drive for easy and wide access for initiative team, stakeholders and community

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Projecting ROI	<ul style="list-style-type: none"> - Constant review of the outcomes 	<ul style="list-style-type: none"> - Time & manpower needed to focus on projecting ROI - Determining who we are measuring ROI for 		<ul style="list-style-type: none"> - Tying ROI to increase in retention and persistence --> x additional students stayed enrolled = x additional tuition dollars

Optimal Approach

- Set data-informed goals that can be tracked and adjusted as needed
- Frequent sharing of narrative regarding effort and progress
- Identify similar initiatives and using their reports to guide planning

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Initiative alignment with larger strategic goals of the institution	<ul style="list-style-type: none"> - Ability to tie to mission & strategic plan 	<ul style="list-style-type: none"> - Lack of clear strategic plan - Being selective of initiatives - Ensuring that you are meeting campus needs and not just following the status quo or the current thing 	<ul style="list-style-type: none"> - Developing an initiative "discontinuance" board - Explaining operational goals at every level for all to understand 	<ul style="list-style-type: none"> - Assessing alignment before moving forward with a pilot

Optimal Approach

- Develop a clearly articulated plan that is driven by the institution's strategic priorities, shared widely with stakeholders and community, informed by data, informed by industry needs and whose budget is aligned with the institution's strategic plan & budget

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Assessing environmental support	<ul style="list-style-type: none"> - Taking a team approach, informed by data 	<ul style="list-style-type: none"> - Lifespan of initiative - Determining who needs to be involved at various points of an initiative's lifespan and afterwards 		<ul style="list-style-type: none"> - Vetting through Student Success team

Optimal Approach

- Leverage IAR/IE and/or a data-informed student success team to determine what we know
- Listen and learn continually

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Funding		<ul style="list-style-type: none"> - All \$ is not good \$ - Difficult to know what makes something fundable ongoing - \$ is spent on new leaders, not worker bees 	<ul style="list-style-type: none"> - Offering incentives for retention - Seeking grants that align - Leveraging grants & funding opportunities that may include other campus partners 	<ul style="list-style-type: none"> - Enhancing what we're doing well - Leveraging existing resources

Optimal Approach

- Build into baseline budget
- No unfunded mandates
- Keep track of the money spent on the initiatives and outcomes to provide evidence for the need

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Stakeholder engagement	<ul style="list-style-type: none"> - Ability to craft the narrative and develop/build engagement 	<ul style="list-style-type: none"> - Engaging faculty to be student-centered 	<ul style="list-style-type: none"> - Weaving students into initiative - Define student-centered on institutional level, divisional level, department level, etc. - Opportunities for open discussion 	<ul style="list-style-type: none"> - Tying institutional funding to initiative's alignment with strategic plan/goals - Extensive cross-divisional engagement

Optimal Approach

<ul style="list-style-type: none"> - Keep students at center - Create language acceptable for politicians so they can advocate for initiative - Identify stakeholders at start of the initiative and update as needed - Develop multiple narratives (compelling + varied) pitched to specific stakeholders
--

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Expertise & training needed	<ul style="list-style-type: none"> - Ability to identify folks on campus who excel in sustainability development and use them to train 	<ul style="list-style-type: none"> - Aligning roles and responsibilities with training - Who's going to pay for the training? 	<ul style="list-style-type: none"> - Consortia of talent resources - Expanding access to training, tools, and assessment training - Review and evaluation of staffing plan for future 	<ul style="list-style-type: none"> - Identifying what skills are needed for project - Building training & assessment for needed skills - Identifying local experts on campus

Optimal Approach

<ul style="list-style-type: none"> - Build training and assessment into original funding in low/no cost fashion - Continuous improvement should shape training
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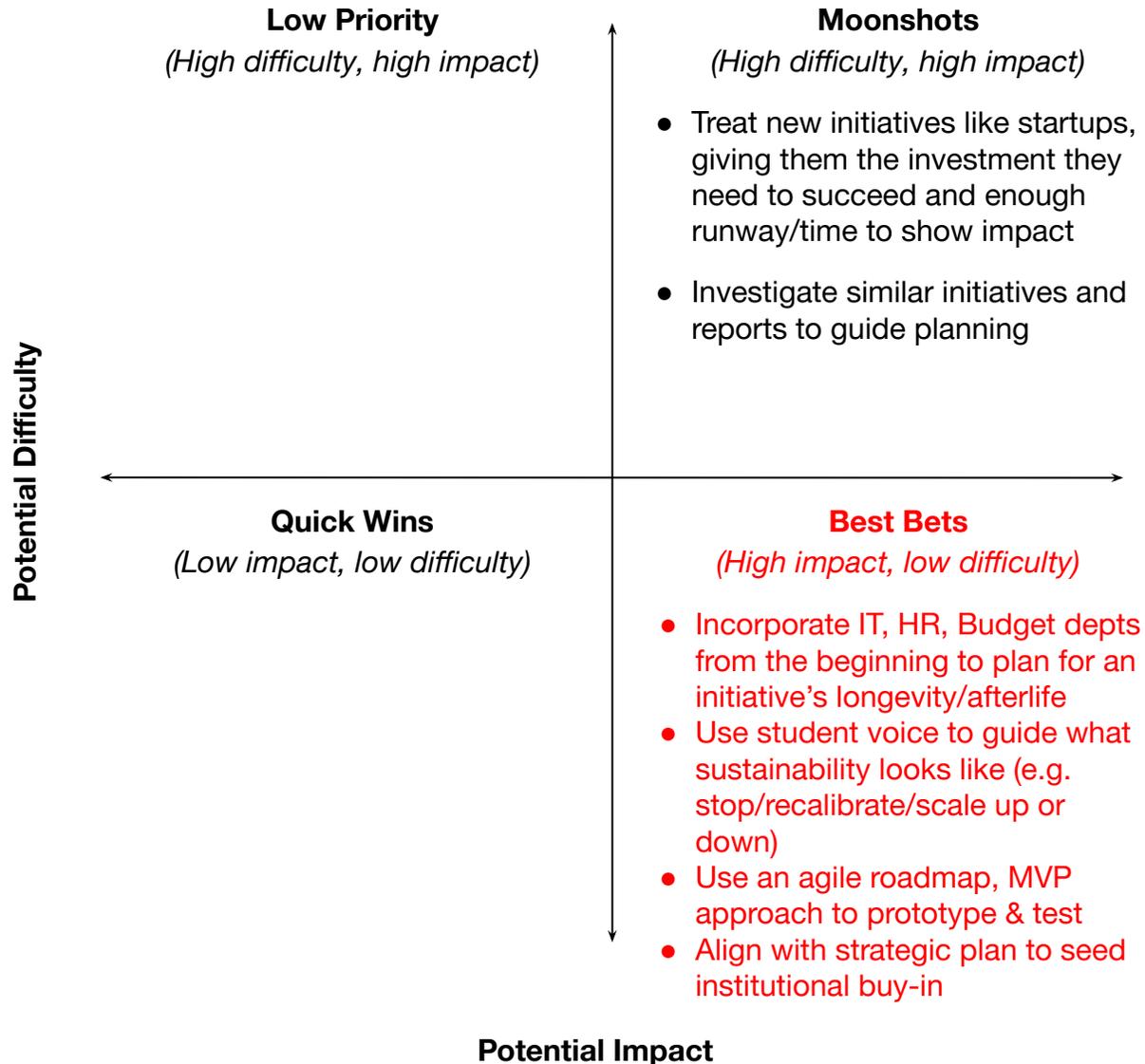
Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Organizational readiness & capacity	<ul style="list-style-type: none"> - Room to increase human personnel 	<ul style="list-style-type: none"> - Evaluating employees' readiness to do their jobs - Changing the mindset of leaders in how they restrain their support staff from growth - Politics 	<ul style="list-style-type: none"> - Leveraging data technology - Developing mentoring plan to help others elevate/take more ownership 	<ul style="list-style-type: none"> - Discussion with student success team - Using available data or making data available - Including students (e.g. SGA) on success team

Optimal Approach

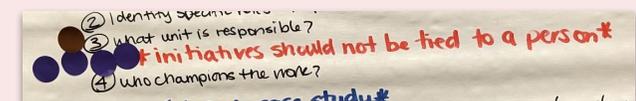
- Identify the desired outcomes, for whom, and how/whether they will expand access
- Assess manpower needs and make an effort to accommodate the need
- Codify solution/intervention in policies to create lasting change

Prioritization



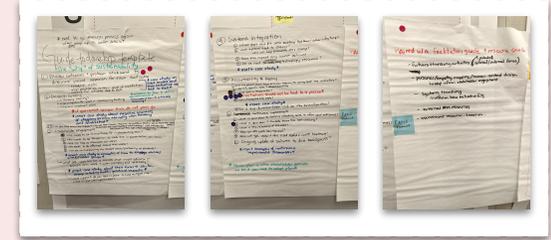
Most Critical Point(s)

Determining what unit is responsible for an initiative, especially its afterlife, is critical. **Initiatives should not be tied to a person** because of the potential fatal loss of institutional knowledge and momentum if that person leaves. Sustainability requires looking towards integration in institutional systems, not just an individual's passion.



What to Build

A Sustainability Planning Guide



1. Review outcomes & problem statement to determine phased approach for each outcome

- Establish vision
- Align project to strategic goals of institution
- Establish how outcomes lead to ROI



Case study on logic models and initiative ROI



Resources on how to define a mission/vision

2. Establish funding

- Is funding recurring?
- Risk mitigation for grant or nonrecurring funding?
- Long-term investment plan?

! if you cannot answer these, do not pass go!



Case study about negative impacts of stopping services abruptly when funding isn't established

3. Sustainability Assessment

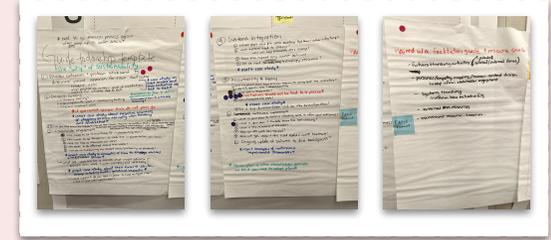
- Do you have executive support?
- Do you have human resources to sustain this with the right skillset?
- Do we have the right data?
- Do we have the right systems & technology?
- What training/PD is needed?
- How much will this cost (then add to funding needs)?
- What are opportunities or threats that might advance or disrupt this work, both internally and externally?
- What supports do you have in place to help mitigate risk? What is your contingency plan?



Case study about the following potential challenges and their repercussions: strikes, changes in funding models, political impacts, etc.

What to Build

A Sustainability Planning Guide



4. Stakeholder Engagement



Case study about how to engage various stakeholder groups

- Who needs to be accountable for implementing this?
- Who needs to be "bought-in" to make sure implementation can occur?
- Who can help us champion our work?
- Who needs to be informed about?
- How are we incorporating student voice/partnering with students?
- Review plan with other stakeholder groups to see if you need to adapt it.

Systems Integration

- Where does this fit into existing systems? Other initiatives?
- What systems need to change? Who will help champion this change?
- Does this impact any current policies?
- Do we need additional technology resources?



Case study about systems integration

5. Accountability & Agency

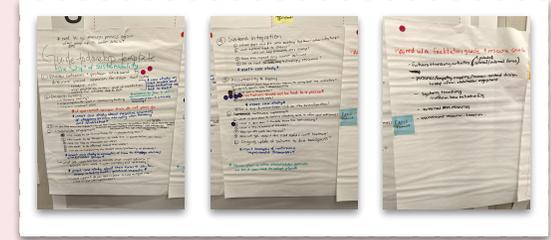
- Does the project team have enough agency to carry out the initiative?
- Identify specific roles + responsibilities
- What unit is responsible?
- ***Initiatives should not be tied to a person**
- Who champions the work?
- Is it tied to mission/vision? If yes, how can we ensure it will survive transitions?



Case study about accountability & agency

What to Build

A Sustainability Planning Guide



6. Continuous Improvement

- What is your plan to continue collecting data to inform your outcomes?
- What is your plan if the data shows this isn't working?
- What is the relevance of the work?
- How can this work be improved?
- How will you assess if this is still needed and worth investment?
- Ongoing updates of outcomes to drive needed pivots?



Examples of continuous improvement frameworks

Facilitation Guide & Resource Guide

- Futures & thinking activities (potential external/internal forces)
- Personas/empathy mapping/human-centered design to help inform stakeholder engagement
- Systems thinking to inform how initiative fits
- External project management resources
- Assessment resources (e.g. [SMART](#))
- [RAPID Framework](#)

2. PROJECT PREPARATION

3. PROBLEM UNDERSTANDING AND DEFINITION

3. PROBLEM DEF & UNDERSTANDING: DETERMINE HOLISTIC METRICS

How do you determine appropriate and holistic metrics for assessing outcomes?

Challenge of Practice #3

DETERMINE HOLISTIC METRICS

“Incorporate student voice. Students may say, ‘I appreciate you’re trying to help me with this, but actually what I need is this.’ And it’s really important to close the loop. Often we ask for student voice, but instead of sending what we hear back to students, we hoard that data for ourselves.”

Key Takeaways

- **Ask students what they need, and listen to them.** Incorporate student voice and reflect what you learn back to the community.
- **Root cause analysis is critical** for problem understanding and should drive metrics definition and use.
- **Metrics aren't everything and sometimes metrics won't give you a statistically significant result re: impact. Student testimonials can supplement weak or messy measurement** and can be persuasive.
- **Generative AI: How can MLLs leverage it for this?**
- **Training in data skills is critical for MLLs**, and if possible, allocate budget for initiative-specific data analysis.
- **Capacity, support, infrastructure** for data are critical.
- **Key consideration:** Do our metrics include our community responsibility? What is the gain for the community and how do we measure this?
- **Leverage existing IE frameworks** to reduce confusion and save time.
- **Measurement of career readiness** can be an interesting and useful metric to capture and deploy towards ROI.
- **Leverage technology** as a tool.

Group Ideation Summary

Equity Considerations

1. It's critical to identify all groups and explore how their experience might be affected. This includes understanding intersectionality and looking at data and the target problem through its lens.
2. Be sure to consider IPEDS, first-gen, financial/Pell, (GPA, DFW).
3. Include stakeholders that are not regularly part of the conversation (e.g. tutoring + CTE) for pass rates and course redesign conversations.

Student Considerations

1. Focus on student experience and ask students what success means (regularly). Prioritize needs that students identify when defining problems to tackle.
2. Student voice and perspectives must be included in determining metrics/outcomes. It's critical to ask if we understand and serve **all** of our student population, not just the most salient or conventionally identified groups.

Faculty Considerations

1. Combine data visibility across divisional lines and faculty. Be sure to ask why something matters to faculty (as well as students, the institution, and your team members).
2. Beware that data can be manipulated to support the oft-perceived notion that "*students aren't prepared.*" Approach problem definition and use data in ways that mitigate this.

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Describing the problem in terms of measurable outcomes	<ul style="list-style-type: none"> - You can develop shared understanding, alignment to move project forward in a clear way with tools like SMART 	<ul style="list-style-type: none"> - Lack of power/agency re: deciding which outcomes are important - Sometimes what needs to be solved is hard to quantify - It can be unclear what those who make decisions care about 	<ul style="list-style-type: none"> - Linking to mission/strategic plan - Simplifying/training opportunities across and within units for holistic understanding creates clarity so other units can align 	<ul style="list-style-type: none"> - Implementing an assessment process - Sharing information with key stakeholders to get feedback

Optimal Approach

- Most important: Ask students what they need. We often do not listen.
- Ask "Does everyone understand the data? How is it interpreted?"
- Ask "Where is inequity?"
- Ask "Who needs this data to provide successful student expression?"
- Ask "What are the critical data points? Do we need to adjust as we go?"
- Ask "Are we collecting the right data?"
- Ask "Are we clearly defining the right population?"
- Ask "How feasible is quant/qual?"
- Ask "What is our capacity?"
- Ask "What is measurable and what is not?"
- Look beyond retention/persistence
- Define the goal
- Have a clear research question: Define the "Why?"
- Use SMART tool
- Ask "Are there any leading indicators?"
- Define the deliverable, how we measure, how data is collected, data sources, etc.
- Build determination of metrics, data use and assessment into project plan
- Data training for MLLs
- Share information with key stakeholders to get feedback

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Identifying relevant metrics for a holistic view of the problem	<ul style="list-style-type: none"> - You know you can measure what you need to to answer your question 	<ul style="list-style-type: none"> - May need to be creative in gathering data we don't have - Everyone isn't always informed; administration doesn't always share; no transparency - Siloes make sharing and communication difficult 	<ul style="list-style-type: none"> - Opportunity to focus on small set of priority metrics - Opportunity to inform everyone about student experience 	<ul style="list-style-type: none"> - Assessment plan as part of charter/project plan - Logic model

Optimal Approach

- Ask "What are the various data points?"
- Define a process for defining holistic
- Use qual + quant research methods (focus groups; mixed methods) to help define metrics and identify opportunities
- Don't let the average hide the individual student story
- Frame the problem from students' POV
- Conduct a lit review of similar studies/initiatives
- Understand the multivariable nature of challenge!
- Data training for MLLs
- Use a logic model
- Use data/tech to inform all to provide a holistic approach to student experience

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Requesting & collecting data	<ul style="list-style-type: none"> - Data exists, usually what you need you can get, but you have to know what you want 	<ul style="list-style-type: none"> - Tons of data available to wade through - Navigating data politics - Determining what we really need - Clarifying expectations with data - Using the data in a realistic, ethical manner - Knowing how to define user needs quantitatively - Organizing data - We ask for the same data, but don't do anything with it - IAR/IE/Data people providing data without explaining it - Only a few people or units (IAR/IE) or EM that generate data reports 	<ul style="list-style-type: none"> - Watching trends - Lots of dashboards (EAB, Tableau, etc.) 	<ul style="list-style-type: none"> - Tableau, EAB, lots of dashboards - IAR provides formal reports

Optimal Approach

- Explain data and provide action
- Data training for MLLs
- Leverage IAR team for their expertise
- Holistic review of surveys and dashboards to reduce duplication
- Utilize NSSE (National Survey of Student Engagement)
- Clarify use of data; be transparent about who needs it and why
- Inclusive access to data (at the level of practice)
- Internal review of data sources so that you aren't recreating the wheel
- Look at course-level data in real time
- Ask "What data do we already have? What data do we need?"

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Data analysis capacity/support	<ul style="list-style-type: none"> - There are IAR/IE offices with capable people 	<ul style="list-style-type: none"> - Just a few hold data & report it: "the experts" - Lack of capacity often means less inclusive participation in the work 	<ul style="list-style-type: none"> - Getting area-specific data/IAR assistance 	<ul style="list-style-type: none"> - Reports requested, generated, and/or sent by/to specific people

Optimal Approach

- Look at raw data to know what is possible to analyze
- Consider hiring non-IR data analysis capacity
- Training + professional dev so that everyone understands how to filter/interpret data related to outcomes
- Use models/frameworks to guide inquiry
- Share data more broadly down to the 1st-level manager
- Use data to provide support to specific student populations and to better tailor/understand a student's experience
- Shared service

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
How data is used & when it's needed	<ul style="list-style-type: none"> - Ability to connect IR calendar to SS interventions so data is available when needed 	<ul style="list-style-type: none"> - Consolidating data needs rather than having too many individual requests: How to do that and still be inclusive? 	<ul style="list-style-type: none"> - Creating a lean, coherent data strategy & infrastructure - Making informed decisions - Creating other initiatives, programs and services from data - Continuous improvement 	<ul style="list-style-type: none"> - Sensemaking collectively - Providing models + frameworks for how to think about what you do with data - Making informed decisions. create other initiatives, programs and services from data. continuous improvement

Optimal Approach

- Cultivate culture of continuous improvement
- Reduce fear and embrace failure as an opportunity to improve
- Data training for MLLs
- All relevant stakeholders participate and generate questions based on the data
- Data is accessible without having to ask for it, so that it's there whenever a user might need it
- Use data/share it/integrate it with best practices
- Share trends and provide action items
- Understand data and its shortcomings
- Make data available at the level of practice (e.g. individual pass rate trends by/for faculty member)
- Use metrics within appropriate frames of potential action; avoid data weaponization
- Curate reports for stakeholders; define who needs to take action
- Use real time data to make appropriate and timely interventions and decisions

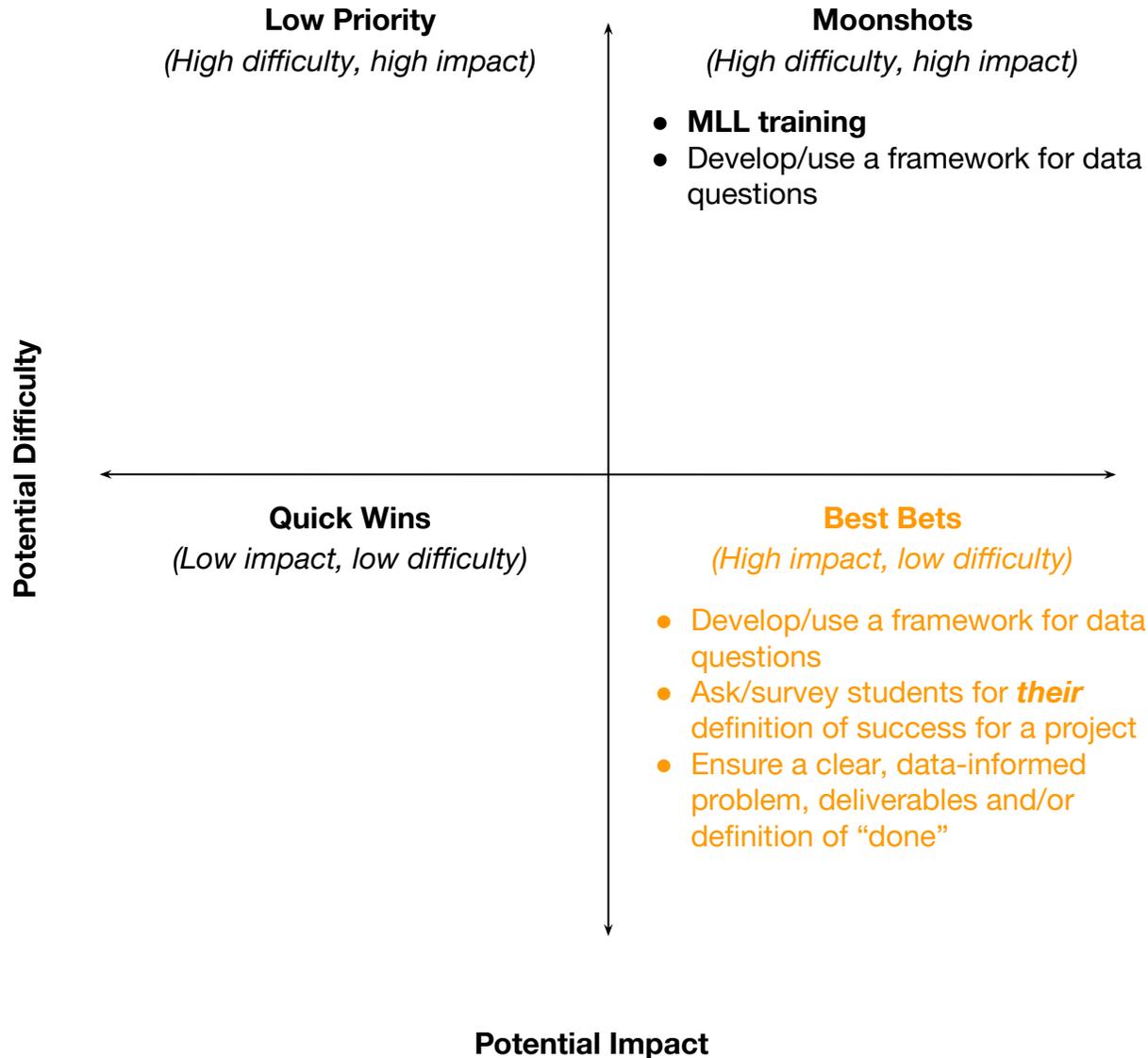
Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Linking metrics to institutional return on investment	<ul style="list-style-type: none"> - Increased evidence to support further investment 	<ul style="list-style-type: none"> - No standard way or understanding of how to calculate ROI - Extremely hard to pinpoint single variables that make a difference re: retention & grad rates 	<ul style="list-style-type: none"> - Making budget decisions/priorities more transparent 	

Optimal Approach

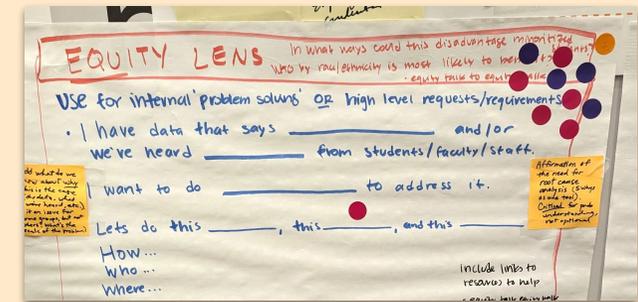
- Design initiatives that align to institutional vision + mission
- Data training for MLLs
- Explore data-driven savings
- Does student satisfaction lead to alumni giving?
- Link to social mobility & employment after graduation
- Highlight ROI in terms of metrics, but also in terms of social impact
- Link to graduation rates, persistence, retention, enrollment as clearly as possible

Prioritization



Most Critical Point(s)

Data requests/requirements **madlib form** to help guide initiative data use and metrics determinations



What to Build

Madlib + Guide for Problem Solving and Data Requests/Requirements



Equity Lens

- In what ways could this disadvantage minoritized students? Who by race/ethnicity is most likely to benefit?
- What do we know about why this is the case (the data, what we've heard, etc.)? Is it an issue for some groups, but not others? What's the scale of the problem?

Using Evidence Project Form/Consulting Process

1. Describe plan/project components (brief & high level).
2. Identify the key student outcomes you expect this project to impact and why or how the activities will influence the desired outcomes.
3. Identify as explicitly as possible the key outcome metrics of student success you will use to track and measure the impact. Does good data already exist? If not, what data do you need?
4. Describe the overall assessment plan for the key metrics you want to measure & track including pre/post methodology, assessment instruments, target goals, and plans for ongoing assessment, milestones, etc. What is your timeline for when to expect results?
5. Describe what sort of assistance or support you may need.

Resources

- [*From Equity Talk to Equity Walk*](#)
- [*Toward Convergence: A Technical Guide for the Postsecondary Metrics Framework*](#)
- The [*5 Whys*](#) (or other root cause analysis tools)
- Higher Ed case studies

What to Build

Madlib + Guide for Problem Solving and Data Requests/Requirements



I have data that says _____ and/or we've heard _____ from students/faculty/staff. I want to do _____ to address it. Let's do _____, _____ and _____.

How...

Who...

Where...

When...

We're doing it! Let's be sure to track our work. We are tracking it by _____.

Did it work? I know it did/didn't work because _____.

*Students said _____.

How can we improve? Let's ask _____, _____ and _____.

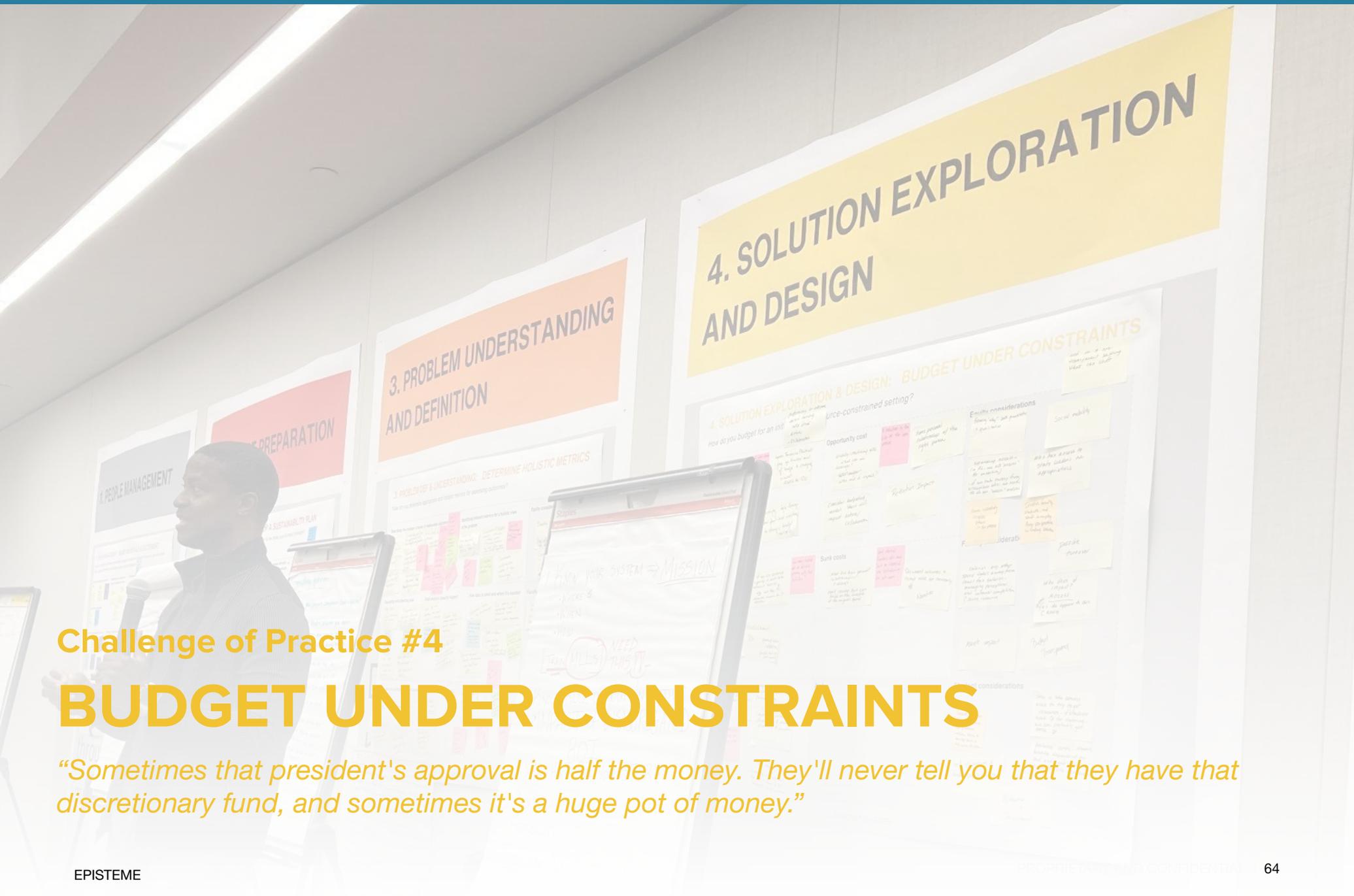
Let's share our work with stakeholders, students, etc. (*Close the loop.)

What do we need to do this? (i.e. reports, dashboards, One Sheets, presentations, social media, etc.)

How can we keep this going? What's next?



*Assistant like
Microsoft Office
Clippy or
GAI/ChatGPT
bot for
guidance*



Challenge of Practice #4

BUDGET UNDER CONSTRAINTS

“Sometimes that president's approval is half the money. They'll never tell you that they have that discretionary fund, and sometimes it's a huge pot of money.”

Key Takeaways

- **Develop the flexibility to discontinue and re-engage** an initiative.
- **Center students** to break down institutional silos and **to rationalize how to budget for initiatives that attack the same or similar problems.**
- **Share money instead of hoarding resources** with other teams/initiatives/departments so that you can each give and take when you have (or one of them has) a budget surplus or shortfall.
- **Train MLLs on how to budget** and on your institution's budgetary processes and context.
- **Embrace funny money**; if you can demonstrate a need in terms that are persuasive to leadership and center student needs, often discretionary funds can be tapped to support the project.
- **Get someone from Budget on the team.**
- **Involve faculty, students and staff to employ their perspectives in finding solutions.** Faculty (deans + chairs) need to understand ROI also, not just SS and Student Affairs.
- **Find out who has access to state leaders re: appropriations** and try to leverage their support.
- **Do a budget reset**, if necessary.
- **Sometimes the story of each unit just needs to be mapped to show the links**– and to persuade the powers that be to provide more budgetary resources.

Group Ideation Summary

Equity Considerations

Critical to ask and map out explicitly at this stage: Does the initiative expand or support access and success for minoritized and/or marginalized students? How will this be maintained in the long-term/in the initiative's afterlife?

Student Considerations

1. It's easiest to try to get resources if your ask is centered on or framed clearly around student needs. (E.g., if students need \$ for tutoring, we can probably get some \$.)
2. Students are heavily dependent on aid and institutions can't use tuition to generate \$.
3. Student retention and persistence are critical for justifying budgets and core for determining or projecting ROI.
4. Creative cost-saving solutioning through students: Share the problem with student groups (or create student task forces) and empower them to develop tools to help develop solutions.

Faculty Considerations

1. Any other spend takes away from lower faculty salaries, so managing perceptions and internal competition around scarce resources is critical to securing (more) budget for initiatives.
2. Be transparent about initiative budgets with faculty. Some faculty do seem to care about access, so foregrounding access can incentivize faculty involvement despite limited resources/funding or lack of financial incentives.
3. Faculty (deans + chairs) need to understand ROI also, not just SS and Student Affairs.
4. Involve faculty to employ their perspectives in finding creative solutions.

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
<p>Opportunity set (all possible combinations of service/ intervention that can be afforded given budgetary limitations)</p>	<ul style="list-style-type: none"> - Creativity to do a lot with a little - Opportunity to research alternate routes to the end goal - Ability to see how many other users/people benefit (and what groups)? - Sharing \$ across budgets - Shared tech 	<ul style="list-style-type: none"> - Time constraints to meet deadlines - Leadership expects the same outcomes - Agenda of leadership - Favoritism - Politics - Someone gets cut; how many people can win? - Maximizing winners broadly (access) - No transparency - Little agency - Lack of clear vision/alignment - Hard to move \$ across programs even if ROI appears negative; how to improve to maintain or generate agreement to shift? 	<ul style="list-style-type: none"> - Opportunity to present data to prove why an initiative requires funding - Involving different people as part of the decision-making - External partnerships 	<ul style="list-style-type: none"> - Eliminating part of event/initiative to accommodate a budget decrease - Transparency: making the vision visible for everyone to see and know - Leveraging economies of scale - Renegotiating existing contracts - Working across institutions similar size/demos - External \$: donors, grants, state aid-specific, not appropriation

Optimal Approach

- Access: maximize for \$
- Limit complexity
- Review what we are currently doing to identify how to streamline costs
- Research what similar orgs are doing under budget constraints
- Improve business practices to free up budget to strategically reinvest; assess to ROI
- Identify high-leverage, low front-end investments to change budget narrative
- Leverage tech for process cost savings
- Investigate performance or outcome-based funding to drive actions & collaboration

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Opportunity cost (what must be given up in exchange for what's desired)	<ul style="list-style-type: none"> - Cross-campus collaborations with like-minded colleagues 	<ul style="list-style-type: none"> - My initial ideas are diminished as I share creative space with my campus partner - Time/staff time \$ - Not getting back the budget/resources you gave up 	<ul style="list-style-type: none"> - Circumventing siloes through collaboration - New campus partnerships - Design thinking creativity - Grants 	<ul style="list-style-type: none"> - Eliminating part of initiative - Emailing individual offices seeking interest in event or initiative - Scaling down

Optimal Approach

- Consider budgeting models; these will impact actions/collaborations
- Prioritize retention impact
- Find creative solutions to supplement low budget
- Scale down initiative
- Consider what you can leverage in exchange for more resources/budget
- Access to readily identified campus partner to eliminate the need to fish for collaborators
- Find external collaborators
- Build personal relationships with the right person

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Sunk costs (costs that occurred in the past and cannot be recovered)	<ul style="list-style-type: none"> - The opportunity to evaluate the services that were funded by eliminated funding - Knowing when to walk away - Conducting improvement cycles 	<ul style="list-style-type: none"> - Once evaluated, it's unclear who to report to that has the time to care - Doubt that anything can change 	<ul style="list-style-type: none"> - Developing an annual plan to review current initiatives to know impact; developing narrative to show value 	

Optimal Approach

- Build on the benefits of the original spend (e.g. relationships, data, skills, materials)
- Seek external funders who have an interest in the initiative or its outcomes
- Document outcomes to recoup value, if not necessarily \$, then other things of value (e.g. compelling narratives)
- Avoid sunk costs fallacy and pivot when needed

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Utility (the satisfaction, usefulness, or value obtained from services rendered)		<ul style="list-style-type: none"> - Data presented has limitations 	<ul style="list-style-type: none"> - Valuing the agency of diverse focus groups and their perspectives - Conducting research to expand on limitations - Showing ROI beyond \$ 	

Optimal Approach

- Develop committees to review the various outcomes
- Seek student voice to see how the initiative served students
- ROI: Persistence for who? Assess other outcomes (e.g. satisfactory learning)
- Determine impact on external stakeholders and community
- Determine impact on "internal:" Board - \$ donations; alumni = \$ donations
- ROI beyond \$: Frame ROI in a way that the value is shown in the community and across the institution

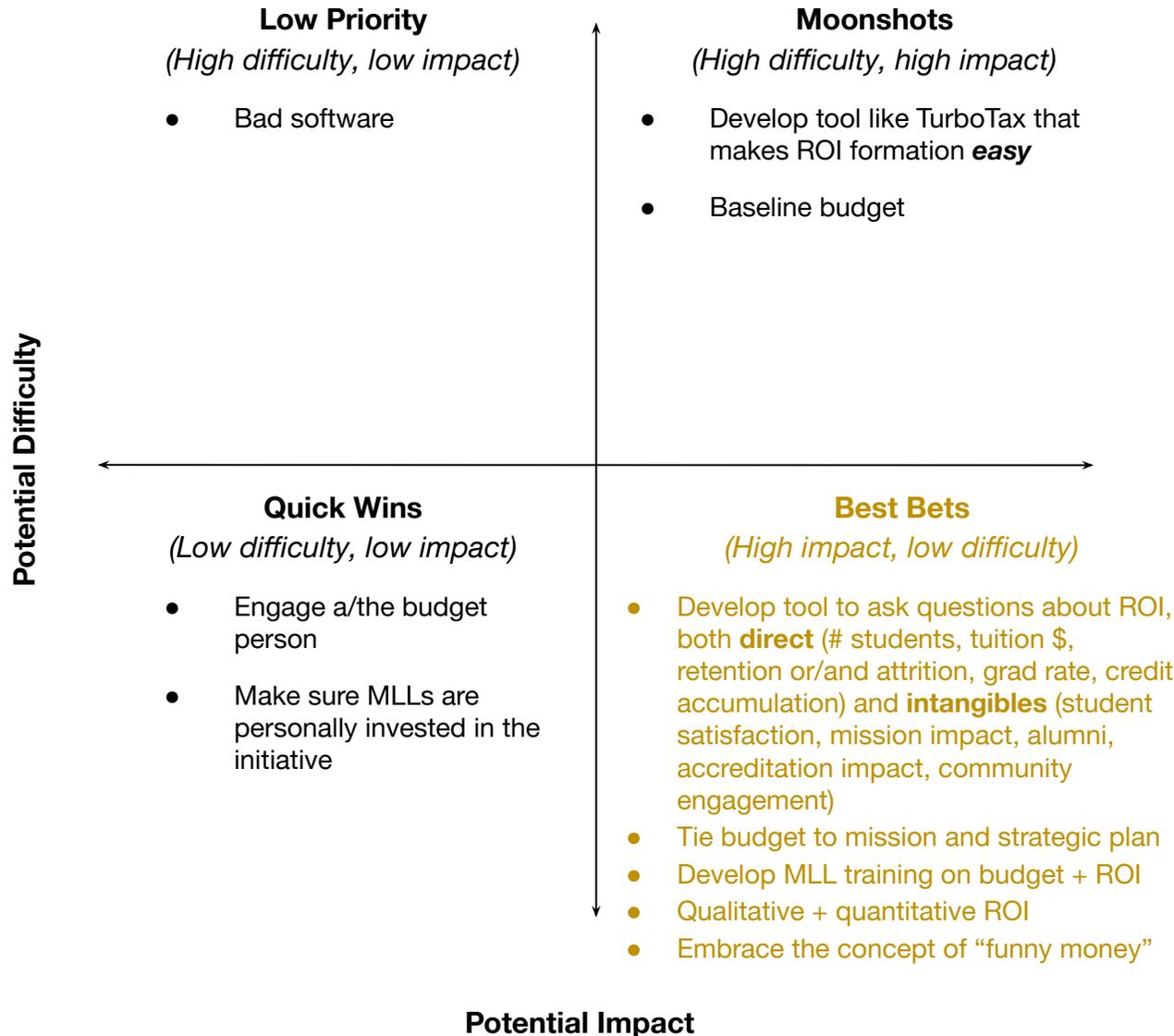
Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Marginal analysis <i>(comparing the benefits and costs of choosing a little more or a little less of a resource, method, or approach)</i>	<ul style="list-style-type: none"> - Love a pilot! Small pilots can yield rewards - Having understanding of what's available and being able to build out based on that understanding 	<ul style="list-style-type: none"> - Difficult to measure impact in this middle ground - Can be difficult to determine (or prioritize) for whom to measure benefits/cost 	<ul style="list-style-type: none"> - Empowering staff, faculty to translate issues/solutions into effective data to help with decisions 	<ul style="list-style-type: none"> - Demonstrating revenue generation (which is not equitable re: units because it's hard to argue for revenue \$ for service providers)

Optimal Approach

- Collect data from peer and aspirational institutions
- Avoid duplication of effort
- If we are centering equity, it needs to be around access. Who will the \$ +/- increase/decrease success for?
- Determine how many students we are actively serving with this initiative
- Assessment/ROI should be quantitative (retention) & qualitative (strategic priority)

Prioritization



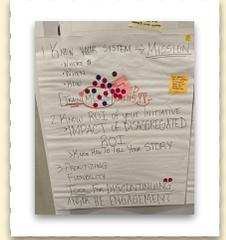
Most Critical Point(s)

Train MLLs on how to budget for initiatives in the higher ed “economy.”
MLLs need training as well as tools to understand how to project impact so guesses are educated ones.



What to Build

ROI Calculator Tool & Budgeting Guide



ROI Calculator Tool

- Develop tool to ask questions about ROI both **direct**
 - # of students
 - Tuition \$
 - Retention and/or attrition
 - Graduation rate
 - Credit accumulation
- and **intangibles**
 - Student satisfaction
 - Mission impact
 - Alumni
 - Accreditation impact
 - Community engagement

Budgeting Guide

- **Know your system**
 - Where \$ is
 - When it's available
 - How it's disbursed
 - Institutional priorities
- **Know ROI of your initiative**
 - Impact of disaggregated ROI?
 - Know how to tell your story to engage key stakeholders & funding gatekeepers
- **Prioritize flexibility**
 - Deliberate approach to and consideration of discontinuing and/or re-engaging initiatives (Possible to develop a tool to guide this?)

5. IMPLEMENTATION

6. WF

5. IMPLEMENTATION: ENSURE ALIGNMENT AROUND PROBLEM

How do you ensure alignment around the problem and intended outcomes throughout the initiative's life?

The board contains the following sections and notes:

- Clarity of purpose:**
 - Get user from Commission/Trustees
 - clear alignment with strategy plans
 - Charter decisions, shared, signatory documents
 - Identify individuals who are responsible
 - State down decision making - purpose
- Ensuring comm among the key project stakeholders:**
 - regular meetings
 - regular updates
 - regular updates
 - regular updates
- Ensuring clarity in responsibilities:**
 - Clearly defined roles
 - regular updates
 - regular updates
- Equity considerations:**
 - Who don't they represent? Who don't they include?
 - regular updates
- Clarifying relationships:**
 - regular updates

Challenge of Practice #5

ENSURE ALIGNMENT AROUND PROBLEM

“If something's not working, stop it. If you find out it's not working and the data is not there, you can maybe choose another way to do the project. There's nothing wrong with changing the project as you go, right?”

6. WRAP-U

What do you do

The board contains the following sections and notes:

- Narrative:**
 - Clearly tie to mission system
 - Explaining why
 - Keeping accurate documentation
 - Clear, define outcome
- Dissemination and:**
 - regular updates
- Determining next steps:**
 - regular updates

Key Takeaways

- **Knowing who students are and centering their needs** is fundamental for successful initiative implementation.
- Shared understanding and **regular communication** is vital **across rank, title, and functional area**.
- **Relationships and politics must stay top of mind**; being prepared for political challenges (e.g., stalling tactics) is critical for success.
- **The voice and perspectives of diverse stakeholders is critical** for ensuring that all team members are appropriately equipped to address the problem and that the work is carried out using agreed upon methods and approaches.
- **Knowledge of best practices** for student success is critical but there is little time and capacity to collect and facilitate pertinent information; consider these needs early.
- Leaders must be **intentional about the use of the appropriate (internal and external) personnel** at the right time.
- **Developing community partnerships/involving community members** is often forgotten as a critical step that can result in additional capacity during implementation.
- **Keeping morale and excitement high** is crucial during this stage.
- Leadership engagement and advocacy is imperative; **don't start an initiative if you don't have the support or resources** to finish it.

Group Ideation Summary

Equity Considerations

Know your students; disaggregate data; make sure implementation can be varied based on student need; reflect upon who the initiative benefits and who it might exclude.

Student Considerations

Flexibility around student needs; purpose of efforts should be easily identifiable and address specific pain points/needs; students should be involved in implementation and comms; be overly cautious about pulling initiatives that students rely on.

Faculty Considerations

Value teaching and student engagement in the tenure process; departmental alignment with institution as a priority; shift the “it’s not my job” culture to an institution-wide culture of care, especially amongst faculty administration).

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Maintaining clarity of purpose & outcomes	<ul style="list-style-type: none"> - Mission and vision-driven approach 	<ul style="list-style-type: none"> - Resisters - The myth that the current process does/doesn't work - Defining the initiative's life span - What's the definition of done? 	<ul style="list-style-type: none"> - Using new members - Forum for Q&A – keeps things transparent and allows leaders to share the ‘why’ behind decisions; eliminates the grapevine - Finding, refining and continually sharing the agreed upon why - Good branding and marketing to “sell” the initiative 	<ul style="list-style-type: none"> - Ensuring that people with knowledge of the problem are chosen to be in the space

Optimal Approach

- Shared meanings of data and metrics
- Decision-making and ideation based on data and purposeful action
- Evaluate and review at periodic touchpoints
- Ensure that work stays in scope, demonstrating alignment with strategic plans
- Transparent communication across ranks and titles
- Clear mission, vision, purpose, & principles
- Identity those who can contribute and gain their buy-in
- Don't start if you can't finish

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Ensuring common understanding among key project stakeholders		<ul style="list-style-type: none"> - Too many members to consider - Intergenerational conflict 	<ul style="list-style-type: none"> - Diverse team membership necessary to ensure common understanding institution-wide - Respecting and incorporating generational differences in “purpose” 	<ul style="list-style-type: none"> - Keeping the core team small (~7 people) - Having a clear charter - Having clear deliverables

Optimal Approach

<ul style="list-style-type: none"> - Early agreement on data and assessment approaches - Empower stakeholders through training - Members should be involved from project inception and invested in its implementation - Profession development around the issue being addressed - Marketing and communication to stakeholders, community, and competition
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	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Ensuring clarity in roles & responsibilities	<ul style="list-style-type: none"> - Work gets done 	<ul style="list-style-type: none"> - Burnout 	<ul style="list-style-type: none"> - Empowering key people 	<ul style="list-style-type: none"> - RACI charts - Outlining key milestones

Optimal Approach

<ul style="list-style-type: none"> - Periodic assessment and iterative adjustments - Leadership must first be clear on needs and purpose of roles - Should be clearly defined and shared every meeting - Navigate beyond standard workflows - Find or assign roles based on who can easily provide solutions to students - Have conversations with diverse stakeholders that are often overlooked

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Regular evaluation of team needs & composition to ensure that the appropriate skill sets are in the room, etc.		<ul style="list-style-type: none"> - Conflict as a result of change - Burnout - Staff turnover 	<ul style="list-style-type: none"> - Bringing in subject matter experts at critical times for specific purposes (i.e., project launch, scheduled meeting with agenda items specific to their expertise) 	

Optimal Approach

<ul style="list-style-type: none"> - Reminders of purpose of roles in meetings - Intentional professional development opportunities - Growth mindsets - Clear timelines with periodic touchpoints for evaluation
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	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Equipping team & ensuring team access to critical knowledge and data	<ul style="list-style-type: none"> - Everyone is on the same page 	<ul style="list-style-type: none"> - Too much data without sensemaking - Lack of staff and data infrastructure 	<ul style="list-style-type: none"> - Clear and compelling scorecard– are we winning? - Infrastructure improvements - Development of faculty 	<ul style="list-style-type: none"> - Trained data coaches deployed to project teams - Professional development opportunities - Coaches trained by experts and deputized to answer hard questions

Optimal Approach

<ul style="list-style-type: none"> - Access to shared data and dashboards, central repository - User-friendly platforms to collect data and avoid data overload - Training on data collection and analysis across the institution - Use of operational data (robust and reliable) - Increase data literacy

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Clarifying relation of initiative to larger strategic objectives & other institutional efforts	- Promotes buy-in	- Potential loss of funding opportunities due to misalignment	- Celebrating successes	

Optimal Approach

- Communications plan
- Central repository with all information because work may have already been done in the past
- Initiative mapping

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Managing conflicting priorities with transparency		<ul style="list-style-type: none"> - Historical interpersonal conflict brought into the space - Confusion about where things fit in the larger picture - Project loses steam/is cancelled - Information overload 	<ul style="list-style-type: none"> - Identifying what needs to continue as business as usual while purposefully giving time and attention to the initiative - Clear North Star - demonstrating where and how people fit 	

Optimal Approach

- Use data and outcomes to drive decision-making
- Pivot and reframe
- Start with why; must be known and understood before moving the work forward

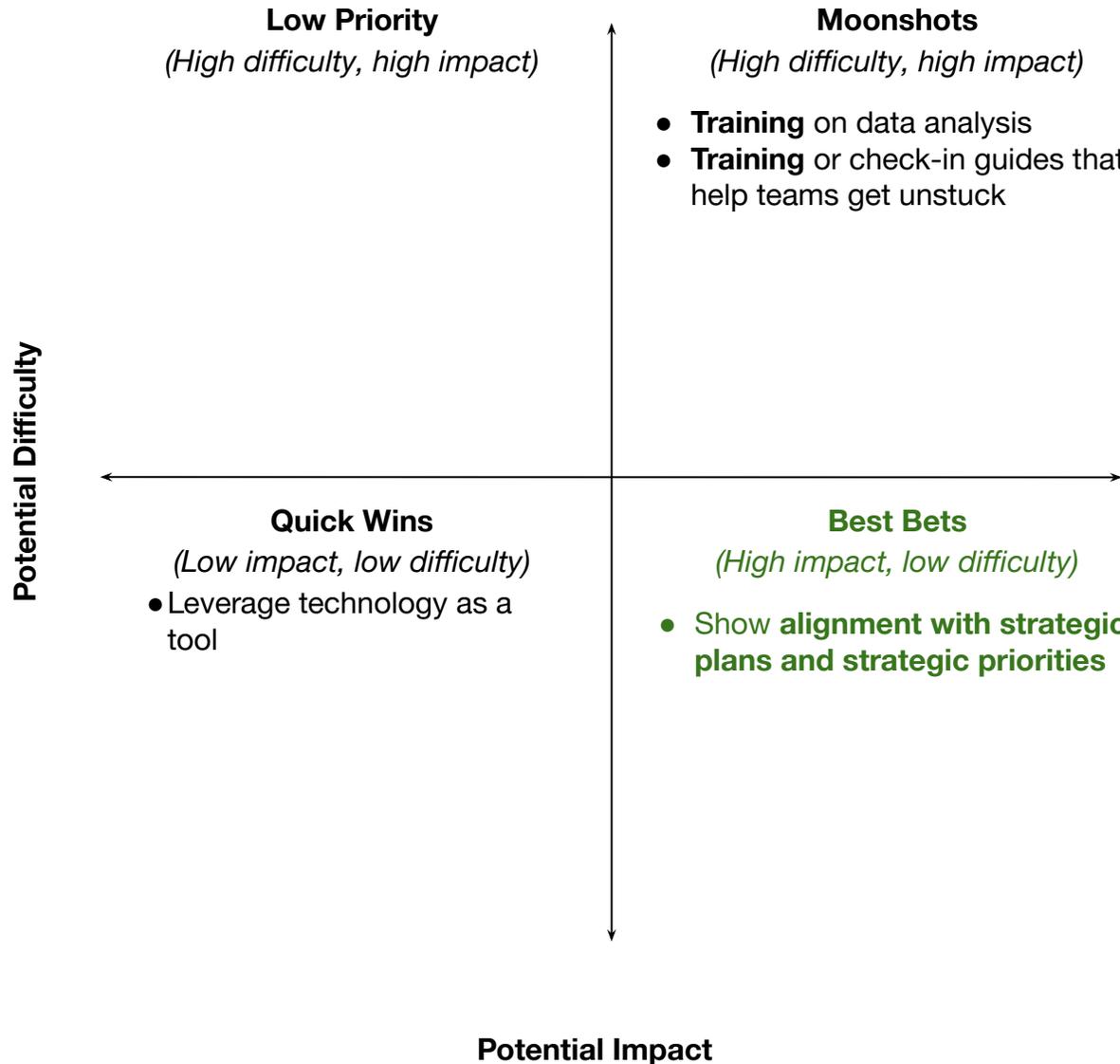
Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Methods for tracking progress & cost		<ul style="list-style-type: none"> - <i>Outdated methods and approaches</i> - <i>Outcomes don't match goals</i> - <i>Hard to calculate ROI</i> 	<ul style="list-style-type: none"> - <i>Refining tracking methods to be more efficient and effective</i> - <i>Ensuring initiative budget requests align with budget cycle with clear communication about what was funded</i> 	

Optimal Approach

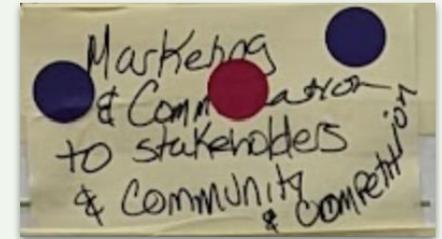
- *Dashboards available to necessary stakeholders with up-to-date/real-time information*
- *Centralized lifecycle tracking plan and process, including use of tech*
- *Accurate data collection to operationalize project*
- *Must define metrics at the beginning*
- *Assessment by trained stakeholders*

Prioritization

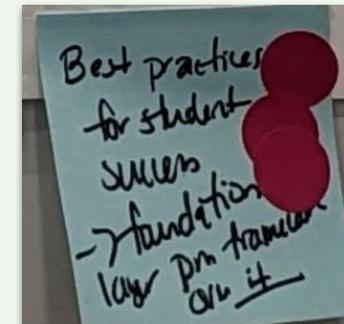


Most Critical Point(s)

Marketing and communications to **stakeholders, community, & competition**

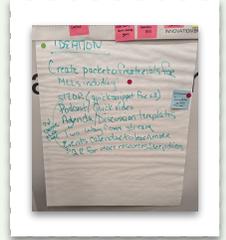


&
best practices for student success



What to Build

Implementation Update Suite/Package



- **A TLDR [too long; didn't read] report template**

- To minimize the amount of time team members have to spend reading updates, provide a regularly circulated quick snippet report that gives high-level updates that can be read by all team members and stakeholders
- Should include the project management framework being used as well as case studies and success stories

- **Podcast series**

- In partnership with students, develop a podcast that outlines practice, progress, and updates across the initiative lifecycle

- **Quick-view videos**

- Create short video updates that can be easily shared

- **Templates for capturing meeting notes & discussions**

- Establish a process for documenting real-time engagement for reference at a later date

- **Two-way communication streams**

- Offer team members opportunities for real-time, two-way communication (Reduce email!)

- **Standardized events calendar**

- As initiative is developed, include all related events on a shared calendar that all team members can access

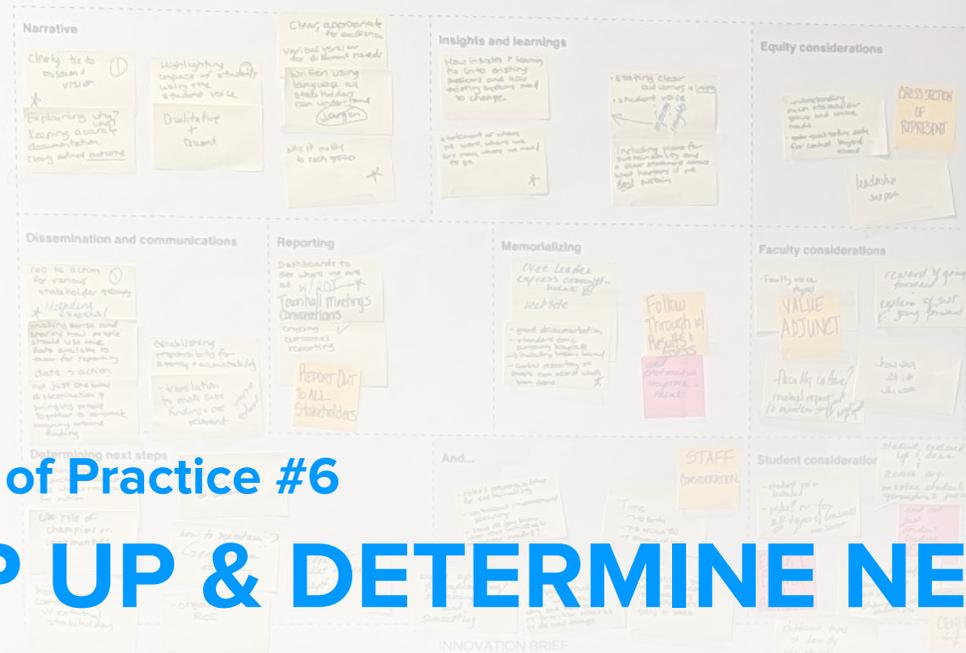
- **QR codes for additional resources**

- Provide quick access to relevant literature, promising practices, exemplars, content, etc.

6. WRAP-UP

6. WRAP-UP: WRAPPING UP AND DETERMINING NEXT STEPS

What do you do to close out an initiative? What needs to happen to ensure its impact is institutionalized?



Challenge of Practice #6

WRAP UP & DETERMINE NEXT STEPS

“You have to keep refining the story because it's ideally going to change as part of this memorializing. You're going to produce something that your executive leadership, your board, your policymaker, your legislator, can take to someone to say, 'Hey, we did this, it was really great, it's improving outcomes for students.’”

Key Takeaways

- **Dissemination, communication, reporting, and memorializing** are experienced as the same work; there is not enough nuance to separate them within the process.
- **Narratives should clearly tie to the mission and vision** of the institution.
- MLLs need more capacity to do this; **it takes time to do this work, receive this type of information, and create structures to maintain the process.**
- Clarity around **ROI and fiscal needs** is imperative for senior leaders to understand to make decisions about sustainability and institutionalization, yet they remain difficult for MLLs to measure and assess.
- **Outlining a call to action** for internal and external stakeholder groups could facilitate co-created meaning around findings to advance collective efforts.
- Reports and sharing should always emphasize that it is **easier and cheaper to retain than reclaim students.**
- Elevate the value and contributions of faculty, **particularly adjunct and junior faculty** members.
- There needs to be a **clear decision-point around sustaining or sunseting** initiatives.
- **Continuous improvement planning** relies on efficient and effective wrap-up processes.
- **More guidance** is needed around how to make decisions for next steps.
- Initiative fatigue is real; must make sure the why for continuing the work is known and **how resources need to be re-prioritized** to do new things.
- **It is vital to discontinue efforts** that are no longer in alignment with strategic priorities and/or have little evidence of impact.

Group Ideation Summary

<p>Equity Considerations</p> <p>Understanding each stakeholder group and their unique needs; qualitative data for context beyond what quantitative sources offer; leadership support.</p>	<p>Student Considerations</p> <p>Perspective and voice from target populations must be included; student-centeredness up, down, and across the institution, including students (not just student leaders) in the process.</p>	<p>Faculty Considerations</p> <p>Reward faculty if project moves forward; clear explanations if something does not move forward; clearly outline how faculty fit into the work; highlight the value of engagement from different types faculty (i.e., adjuncts, tenured, etc.).</p>
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	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Narrative	<ul style="list-style-type: none"> - Clearly communicates the “who, what, when, why, how, and where” - Can create alignment 	<ul style="list-style-type: none"> - Getting broad-based buy-in and understanding what excites and energizes the audience - Ensuring the time, capacity, structure is in place to do this - Mission sensitive - Resources 	<ul style="list-style-type: none"> - Creating alignment - Breaking down silos - Cultivating mindset - If it’s tied to mission and vision, should be able to survive transitions 	<ul style="list-style-type: none"> - Part of the project plan, structure, and process - Document and report

Optimal Approach

- Clearly tie to mission and vision, and embed in process, roles/responsibilities, and comms plans
- Keep students at the center
- Highlight impact though clear ties to personalized student experiences so stories don’t get lost
- The “why” needs to be the throughline
- Keep accurate documentation
- Write using language that stakeholders can understand - no jargon
- Include qualitative and quantitative evidence

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Insights & learnings	<ul style="list-style-type: none"> - Can be scaffolded - Can lead to innovation - Help make <u>good</u> decisions 	<ul style="list-style-type: none"> - Making sure different stakeholder groups are included - Can be overwhelming - Burnout - Intentional work 	<ul style="list-style-type: none"> - Learning from others' perspectives - Lifting up voices that are often unheard 	<ul style="list-style-type: none"> - Developing academic leadership's capacity to lead these conversations with faculty - Framing for different stakeholders

Optimal Approach

- Help stakeholders see how the initiative fits into institutional priorities, projects, etc.
- Engage in sensemaking
- State clear outcomes and include student voice
- Include plans for sustainability and a clear statement about what happens if the work is not sustained
- Describe how the initiative began, where it currently stands, and where the work needs to go
- Outline how insights and learning tie into existing systems and how they need to change to improve student outcomes

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Dissemination & communications	<ul style="list-style-type: none"> - Current tech and infrastructure support multiple approaches 	<ul style="list-style-type: none"> - People can get lost with too much information - Time and capacity to do this work, especially to visit with groups at the level of practice 	<ul style="list-style-type: none"> - Helping people understand their role in sustaining the initiative - Establishing who will do this work early in the project 	<ul style="list-style-type: none"> - Meeting with a variety of stakeholder groups, including those external to the project - Developing champions from team to talk about the initiatives as it relates to the greater good

Optimal Approach

- Create different versions (and comms plans) for different stakeholder groups
- Make sense of and share how people should use the data available to them for reporting and taking action
- Translate to ensure understanding and relevance amongst various stakeholder groups for co-created meaning around findings
- Include a 'call to action' for various stakeholder groups
- Establish responsibility for agency and accountability

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Reporting	<ul style="list-style-type: none"> - Ongoing updates of outcomes to drive needed pivots - Use of data to make adjustments as needed 	<ul style="list-style-type: none"> - Inappropriately structured data causes overload - Lack of expertise in data visualization 	<ul style="list-style-type: none"> - Involving others who might not have access to or be aware of the data - Including promising practices 	<ul style="list-style-type: none"> - Dashboards

Optimal Approach

- Provide inclusive access to data
- More robust dashboards to assess progress
- Report out to all stakeholders
- Town Hall meetings and convocations
- Ongoing ROI tracking and outcomes reporting

Group Ideation Summary

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Memorializing	<ul style="list-style-type: none"> - Less need to recreate the wheel 	<ul style="list-style-type: none"> - Takes time to document processes related to an initiative - Can feel unnecessary - Lack of consistent/easy way to document 	<ul style="list-style-type: none"> - Better ability to connect new initiatives to existing ones - Avoiding duplication of work/ideas that were unsuccessful 	<ul style="list-style-type: none"> - Central repository - Status reporting

Optimal Approach

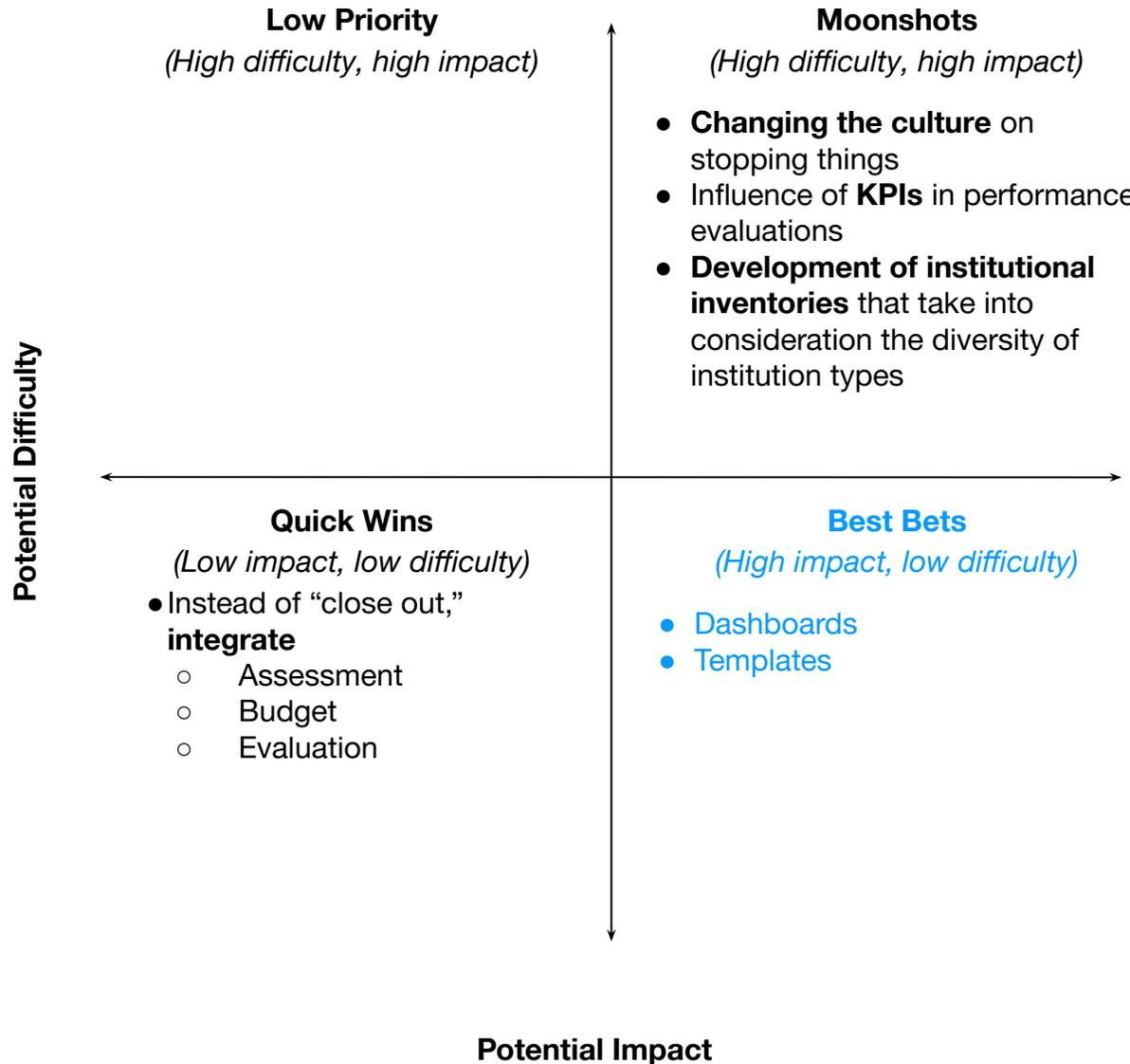
- Document throughout using templates (e.g., standard Executive Summary template)
- Access to needed information
- Central repository to review what's been done in the past
- Follow through with results and assessment

	<u>Strengths</u>	<u>Challenges</u>	<u>Opportunities</u>	<u>Current Strategies</u>
Determining next steps	<ul style="list-style-type: none"> - People know where the work is going - Supports sustainability 	<ul style="list-style-type: none"> - People not wanting to take on responsibility or accountability for next steps - Compensation - Cost/benefit analysis - Letting go of pet projects - Leadership transition 	<ul style="list-style-type: none"> - Leadership transition - Resources - PUBLIC accountability - Reflecting and adjusting (to sunset) 	<ul style="list-style-type: none"> - Funding commitment early on if outcomes are met

Optimal Approach

- Formalized process to build attention/awareness
- Outcomes influence decisions
- Senior leadership support
- Action and accountability plan for expected follow-up
- Define role of champions vs. implementers

Prioritization

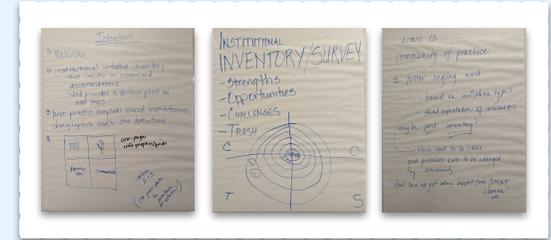


No Critical Point(s)

N/A

What to Build

An Initiative Inventory + A Community of Practice



Initiative Inventory Components

- Customized recommendations for improvements
- A suggested decision-point and next steps for any particular student success initiative
- Promising practice guidance and templates based on institutional demographics and other characteristics
- Benchmark/peer data from similar institutions to assess progress against the field
- **Narrative Infographic:** One-page guide/summary that provides a standardized narrative highlighting successes, strengths, areas for improvement, and resources
- **The Assessment Framework: COST:** To emphasize action-oriented decision-making, inventory results would be shared in the following categories:
 - Challenges
 - Opportunities
 - Strengths
 - Trash



A Community of Practice

To learn with and from other participating institutions

- Sponsored by larger, external entity to ensure equity amongst institutions and to mitigate local political challenges
- Based on institution/initiative type
- Shared expectation of engagement defined by the community

PROCESS LEARNINGS

+

NEXT STEPS

Process Learnings

- The conference was lopsided; think about designing conference to be more evenly spread out over two days.
- For a round robin collective build, make handovers between groups more clear and effective to make the process smoother. Some ideas: A facilitator that actively provides synthesis at the end of each round, time allocated for translation and next steps, or a “leave-behind” member of each group’s previous round to serve as translator (effectively rotating group members).
- Provide at least one week of time for pre-reads. Send preparatory materials for participants earlier so participants have time to digest, prepare and get oriented so as to avoid confusion and time spent on clarifications on site.
- Give more explicit and straightforward instructions: Simplify and streamline instructions as much as possible to avoid confusion and to focus each ideation session.
- Think about incorporating more tech/digital tools in process of “making” to facilitate guide/tool development. (e.g. One team wrote a guide in Docs/Word for their concept.)

Where We Are Going

Design & Development Focus

Develop prioritized innovation brief concepts to make into public goods



What's Next

- Prioritize concepts to refine and develop
- Co-develop materials/tools/products with Community of Users
- Publish materials/tools/products on Changemakers website

The Guide for
Postsecondary
CHANGEMAKERS



Open Questions & Considerations

- Can we build a living general repository/clearinghouse for our Community of Users and the broader MLL community to share resources at Changemakers?
- How can we help nurture a peer MLL community for exchange, support and collaboration?