

THE WRIGHT PATH TO 2025

PRIDE • TRANSFORMATION • POTENTIAL

Group Work for Cycles 3-6

Develop List of Actions—Evaluate and Prioritize—Identify Metrics, Resources & Milestones

This document outlines the work we will accomplish during the remaining strategic planning mini-cycles.

In the third cycle, we will develop ideas for specific projects and actions for each strategic initiative. A project is a significant set of activities that are intended to accomplish a specific aim. At the beginning of this cycle, we will focus on possibilities. The goal is to think boldly about any potential project or activity that could create high impact. We will explore each project idea, outlining the scope of activities and the potential benefits.

During the fourth cycle, we will evaluate each project idea in more detail, examining the complexity, costs, and timeline. We will identify especially promising, high leverage ideas, and we will consider the connections between the proposals that emerge in different groups. We will work with the key leaders at the university to evaluate and prioritize the most promising, important, or essential ideas.

In the fifth cycle, we will further develop those projects within each strategic initiative that have been identified as high priorities. We will identify the milestones and timeline that should be associated with each project. We will articulate the resources that will be required, and we will outline the factors that need to be accounted for in order to maximize the likelihood of success.

Task 10: Share your Ideas in your Group

Format: Full group or small groups

When: Mini-Summit 3 (June 22)

In task 9, you had an opportunity to develop your own perspective about project ideas and actions for your strategic initiative. In this task, you should share these ideas with other members of your group. This task must be completed in mini-summit 3 or in a subsequent live meeting.

As you listen to others' ideas, be intentional about withholding judgment about the viability of the ideas. Ask questions to explore the possibilities that may be associated with each idea. At this stage, you should not make any judgments about the ideas, but rather, you should ask questions. Seek to understand, not to critique.

Suggested steps:

1. Write your ideas on the idea summary sheets – one idea per paper. For each idea, write (1) a headline or name, (2) a brief description of the project, (3) the rationale for the project, and (4) the results.
2. Go around the circle and share your ideas, one per person at a time. Continue circling the group until you have heard all the ideas
3. As you listen to each idea, ask questions to explore the ideas in more detail. Suggested questions might include the following:
 - “What if we were to add _____ to your idea?”
 - “Help me understand _____ about this idea?”
 - “What benefits will come from this idea?”

Remember that the intent of this step is to explore and add to ideas without judgment, not to critique or narrow down the ideas.

4. If you have more than 6 people in your group, you may want to divide into sub-groups for steps 2 & 3 above.

Task 11: Select the Most Promising, Important Ideas

Format: Full group or sub-groups

When: Mini-Summit 3 (June 22)

Having explored the potential ideas that have emerged in your group, in this step you will select a set of ideas to present to the larger community. This task must be completed during mini-summit 3 or in a live meeting.

In preparation for this task, consider the format for sharing:

- The last half of the mini-summit will be dedicated to sharing and idea development.
- Each group will select a set of ideas to share. These ideas should be prepared for display, much like a poster session at a conference.
- Read the instructions in task 12 before proceeding

Suggested Steps:

1. Discuss again all of the ideas that have surfaced in task 10.
2. Consolidate project ideas that are similar.
3. Select those ideas that your group sees as especially promising.
4. Prepare a display for each idea to be posted in your group’s work in the mini-summit meeting room. The display should include: (1) a **headline** or name, (2) a **brief description** of the project, (3) the **rationale** for the project, and (4) the **expected outcomes**, return-on-investment or results.

Task 12: Participate in the Idea Marketplace

Format: Full group and Plenary (full system)

When: Mini-Summit 4 (July 13)

The purpose of this activity is to develop and explore the best ideas for strategic initiatives. It will occur during the first two hours of mini-summit 4.

The **idea marketplace** works as described below:

- Groups will organize “shifts” with about 1/3 of group members in each shift.
- There will be three periods of about 25 minutes.
- Each shift in the group will spend one period discussing the group’s ideas with visitors to the group’s area.
- Non-presenters will visit other areas to explore the ideas of other groups.
- Each person will receive a limited number of stickers that they can use to indicate the ideas they “buy in to” by affixing the stickers on displays.
- This activity will require approximately 1.5 hours.

As you participate in the idea marketplace, feel free to ask questions, make suggestions, and share your perspectives. Remember that the most important aspect of this activity is to explore possibilities in rich detail. It is NOT YET about selecting the ideas we will actually pursue.

Task 13: Evaluate your Ideas

Format: Full group or sub-groups

When: Mini-Summit 4 (July 13)

This is the task in which you will evaluate your ideas in greater detail. At this stage of the process, it is important to stay at a high level of abstraction: make judgments about the viability of each idea, based on educated conjectures. From this work, you can decide on those ideas you most want to put forward as serious proposals to the larger group. This task can be completed between the mini-summits, either live or virtually.

Suggested steps:

1. Review the feedback you received in the idea marketplace.
2. Decide which of the ideas you want to continue pursuing.
3. Suggest an evaluation of each idea, based on criteria that will be provided by the facilitation team.
4. Share this information with Mike Wiehe by July 22.

Task 14: Prepare a Presentation

Format: Interactive presentation by a group representative to University leaders

When: Strategic Planning Leadership Meeting (July 24)

For each significant project idea you wish to put forward, your group should prepare a 1-2 page summary proposal. The summary proposal should include the following information:

- Title for the projects or idea
- Brief description of the idea (max 150 words)
- Key objectives of the project (max 100 words)
- Significant benefits or impact that the project will generate (max 100 words)
- Risks: What we will lose or fail to change if we don't do the project (max 100 words)
- Your evaluations of the ideas as determined in task 13.
- Key questions for leaders.

The group should select a representative to present your ideas to a group of university leaders that will include representatives from the Dean's Council, University Officers and Cabinet, Faculty Senate Executive Committee, and Strategic Planning Steering Committee.

Use the following guidelines to plan the presentation:

- Expect to have approximately 25 minutes for your presentation. Limit your remarks to no more than 8 minutes, allowing the balance of time for dialogue.
- Use other visuals that do not require projection.
- Use your time both to provide an ideal description of the potential project and questions you would like to discuss with leaders.

Send any materials for your presentation to Mike Wiehe by July 22.

Task 15: Create Project Plans

Format: Group Discussion

When: Mini-Summit 5 (August 3)

In this task, you will outline a plan for the projects you wish to propose for inclusion in the university strategic plan. **Write one document for each project.** You should use the feedback received from university leaders to refine and outline the key elements of these project proposals. Your plan should provide a summary perspective on how to implement the proposal.

Suggested steps:

1. You may want to sub-divide your group to accomplish each of the remaining steps for each project proposal.
2. Review the feedback received from university leaders about each of your group's proposed projects.

3. Based on this feedback, revise the summary information for the proposals: title, description, objectives, rationale, and benefits.
4. Build the outline of a project plan with statements to describe each of the following elements:
 - a. **Actions:** List and organize all of the major activities that will be required to carry out the plan. List these actions. Consider the following:
 - How to organize for project success.
 - The specific actions that will be required to carry out the project.
 - The sequence of activities what should come first, second, together, etc.
 - The feedback or input that will be needed from others along the way.
 - How to bring the project to closure.
 - b. **Milestones:** Identify and describe the key deliverables for this project.
 - c. **Metrics:** Identify and describe the indicators of success that should be used to track the progress of this project.
 - d. **Timeline:** Suggest a generic schedule for rolling out the project, once it begins (month 1, month 2, etc.)
 - e. **Resources:** Identify and describe the investment that will be required to ensure successful completion of the project.
 - f. **Success Factors:** Identify and describe any other factors will influence the likelihood of success.
5. If needed, share your work across the sub-groups within your team. Make refinements to your ideas, based on this discussion.
6. Share your work with Mike Wiehe by August 24.

Task 16: Receive Feedback on Working Drafts

Format: Small-group dialogue with university leaders

When: Leadership Meeting (August 16)

This task will be an opportunity for the groups to share their work with university leaders in an informal dialogue.

Suggested preparation:

1. Prepare a written summary of the project plan, **one for each proposed project**, that accounts for the above element. The summary should be brief, high level, and written to align with the template that will be provided.
2. Appoint a spokesperson for each proposed project who can attend the August 16 leadership meeting.
3. Identify a list of questions that you wish to discuss with university leaders.

This discussion will occur in small groups, much like an interactive paper session at an academic conference. Each participant will share his/her proposal. Then members of the group will have an opportunity to ask questions and provide perspective. One specific request we will pose to leaders: Who should be the “lever leaders,” those who should sponsor and support the project?

Task 17: Present Summary of Refined Project Plans

Format: Formal presentations in groups by area of strategic focus.

When: Mini-Summit 6 (August 31)

This will be a major, culminating event in the strategic planning process. We will divide participants into sub-groups of groups, probably according to area of strategic focus. Each spokesperson will have approximately 8-10 minutes to present a project idea.

More details about the format and guidelines for this presentation will be provided on August 3.

Task 18: Finalize Aspirations, Objectives, and Project Proposals

Format: Group discussion

When: Mini-Summit 6 (August 31)

At the end of mini-summit 6, or shortly thereafter, you should discuss any remaining considerations that have surfaced in your work.

As part of this final step, review your original aspiration statement and your objectives. Read these statements carefully. Consider whether they accurately frame the work that you are now proposing. Write modifications or edits.

Provide final drafts of your statements and project proposals to Mike Wiehe and David Bright by September 7.