

Effective Change Management

- Start from “the bottom up”
- Build support
- Connect local efforts and build capacity
- Provide incentives for change
- Set aspirational targets, but keep learning

Considerations

- It is not simply about completing a form. The template is only a way to document the actions you plan to take and your process for monitoring progress. Anyone should be able to review the plan and understand what is or will be happening.
- This requires developing a focus and getting very specific so that the plan guides your activities to achieve your goals and outcomes.
- It is important to not only set a long-range vision and expectations but also focus on immediate actions that will help you achieve your vision.
- The action steps you describe should be based on effective implementation practice (see documents in box folder).
- Developing a plan is cyclical and not a straightforward linear process. For example, you may develop one part of your plan and then revisit it when you’ve developed a different part of your plan to adjust the timeline or change persons responsible.

Preparation

- Gather your materials, including: response to the RFA; self-assessment results, completed to inform your RFA submission; notes and materials from CoP events including February and October in-person meetings; and other materials and notes generated during this first year of planning.
- Review research and other documentation provided to guide/inform your planning.
- Conduct another self-assessment and compare results with the one completed in Fall 2018 (see form in box folder).
- Organize team to support developing the plan and identify roles and responsibilities. Consider: How will you develop the details of the plan (e.g., team meetings, brainstorming sessions)? Who will lead? Who will write which sections? Who will review/edit? Who will gather necessary signatures? Who will finalize and submit?

Build or Expand Your Pathway Navigation Team

- Identify the stakeholders on your campus and generate a list of names of individuals who could serve as team members (e.g., Guided Pathways and equity representatives, counseling staff, deans, vice presidents, instructional faculty, Dean of Student Services, Dean of Counseling, Head of Career Centers, Dean of Instruction, and research staff).
- Identify the roles that you will need on your team, including: Who will lead the team (e.g., manage project, engage with stakeholders, lead meetings, etc)? Who will coordinate the activities (e.g., set up meetings, disseminate notes, track progress, etc)? Who will oversee budget and overall financial management? Who will champion the work at high-level or high-stakes meetings?
- Determine areas of needed expertise (skills) based on your goals and specific activities to be completed.
- Organize/expand your team as soon as possible.
- Consider including “adjunct” team members who can provide expertise and assistance as needed but not be involved in a regular basis.
- Provide introductory information to team members to orient them to the purpose and charge of the team and their respective roles.
- Schedule initial meeting to create team norms including accountability for completing tasks.
- Establish schedule for regular meetings and activities.
- Periodically review team membership and progress to date to maintain momentum and address concerns or needs.

Summarize 2019 Accomplishments and Challenges

- Review the details provided in the quarterly progress reports.
- Compare the results of your self-assessment from Fall 2018 with the results of your self-assessment now.
- Review notes from the convenings, especially the October 4 poster session.

Provide Descriptions of your Implementation and Resource Allocation Plans for 2020-2021

- What will you implement by the end of the 2021 and how will you allocate the resources for each of the two years in support of your implementation activities?
- How will you address all three priority areas (i.e., comprehensive intake, differentiated orientation, and career before education planning)?
- Consider completing this section after you've detailed your goals and specific activities (see sections below). You might think of this section as an executive summary of your action plan.

Specify Your 2020 Goals, Outcomes and Strategies

- What are you aiming to change/implement by December 2020?
- What will you achieve (outcomes) by December 2020?
- What strategies will you use to achieve your goals and meet your outcomes?

Create a Detailed 90-Day Action Plan

- What exactly will you do within the 90 days to make progress toward your goals?
- Are your actions and tasks specific enough so that it's clear what needs to happen and by when?
- Who will be responsible?
- Who else will be involved and what do they need to know?
- What obstacles do you need to address in order to get this done?
- What support/resources will you need to make this happen?
- At the end of 90 days what will you have achieved?

Identify Evidence of Progress and Possible Adjustments

- What are the metrics, feedback, observations, etc. the team will use to determine progress toward the outcomes outlined for 2020?
- What data or other information will you gather or review at regular intervals (e.g., the 30-, 60-, 90-days)?
- How will you know your actions are having a positive impact?
- At this point, it is also important to reflect on "what if." Essentially, what if the plan is not progressing as intended, or unforeseen challenges or delays occur? Reflecting ahead of time, how you might address any necessary changes will allow you to maintain momentum. Consider the following questions: What will you do if the plan is not having the intended impact? How might the plan be adjusted due to accelerated progress or unanticipated barriers/challenges?

Specify Key Meetings

- What are key meetings (in-person and virtually) to ensure consistent communication and project management throughout the year?
- Consider weekly check in calls with key team members to provide updates and communicate progress.
- Consider a longer monthly in-person meeting to delve into more substantive discussions such as reviewing progress data, planning the next 90-days, or addressing an unforeseen challenge.

Develop a Detailed Communication Plan

- Develop a plan that outlines your communication goals, and identifies the various, relevant stakeholders, and the details for how best to communicate with them.
- Identify all the stakeholders that have interest in or will be impacted by the Pathway Navigation work.
- For each describe what they need to know, how best to communicate with them and how often, and who will be responsible. Be sure to reference the communication plan in your 90-day plan.

The full process guide and related materials are in a box folder accessible via this link:

<https://wested.box.com/s/2py2n02aa2wo6ikhwd7ivhz4od3trv1f>