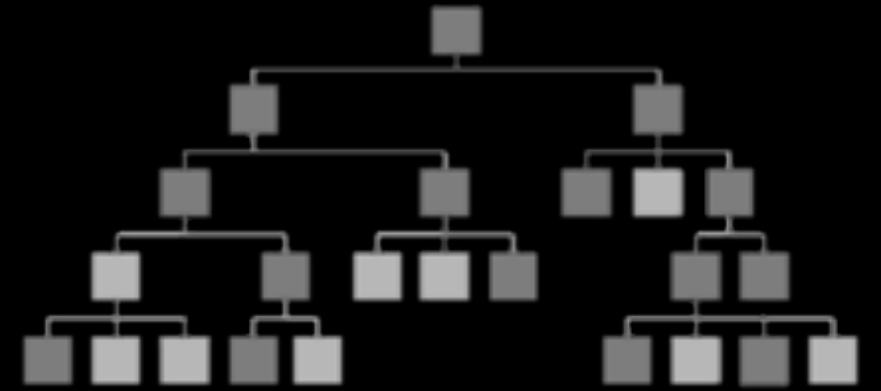


# Evaluating and Managing the Implementation of Your Strategic Plan

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*University of Rochester*





# Evolving Organizational Model

# Getting Under the Hood



# Project Plan Elements

Project Proposal

Problem Description

Major Project Goals

Base Assumptions

Project Deliverables

Restraining Forces

Key Issues

Critical Success Factors

Dependencies

Scope

Milestones

Change Management

Risks

Costs

Stakeholders

Team Roles & Responsibilities

Domain Expertise

Communication

PROJECT PLAN	
Project:	Date & version: 10/24/2019
Project Manager:	
Project Sponsor:	
Put appropriate data from Project Proposal and add details	
Project Proposal's brief description of the project	
Problem Description: What problem will your proposed project solve?	
Major Project Goals: What services or resources will be made better, easier, or more efficient? What new opportunities will solving this problem present?	

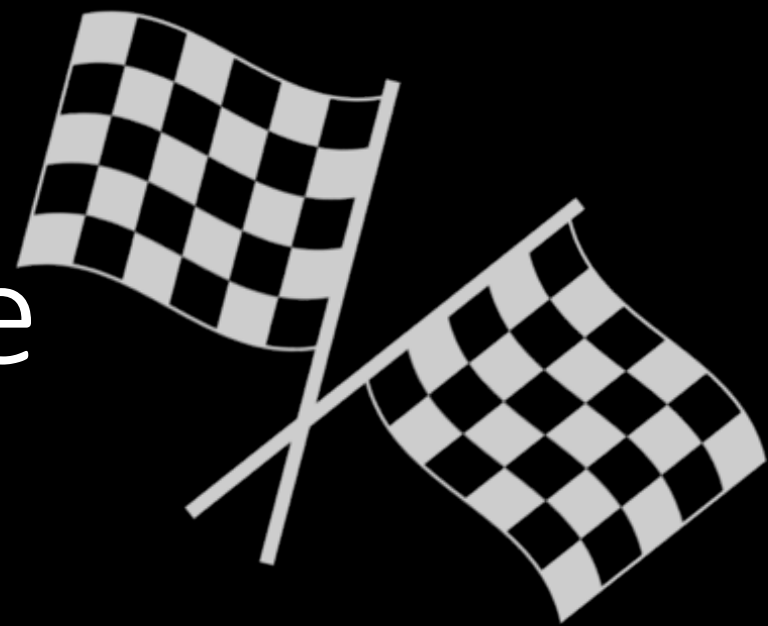
# Roles & Definitions

- Project Manager
- Project Sponsor
- Team Roles & Responsibilities
  - Member
  - Contributor
- Domain Expert
- Stakeholders

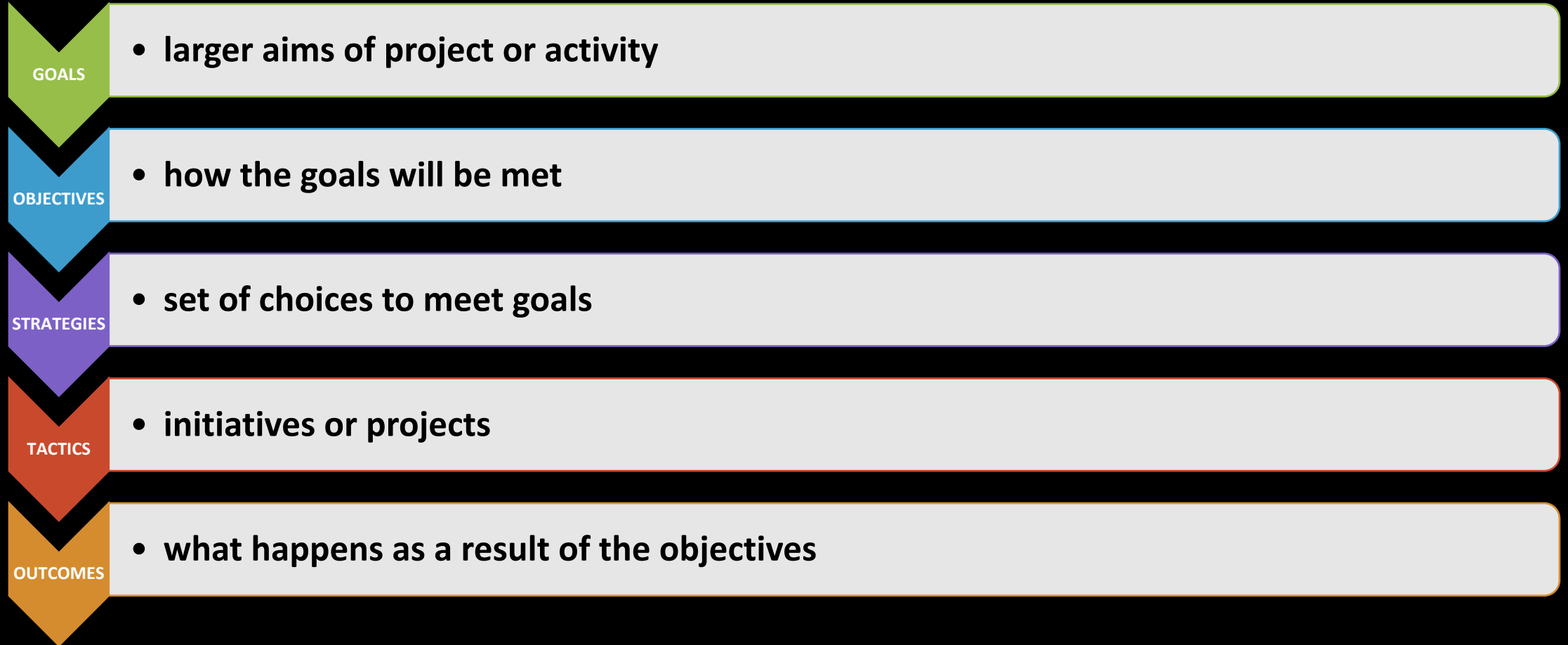
**Project Team Roles & Responsibilities:** List the members of the project team who will be involved with all aspects of the project or contributing specialized skills towards the completion of specific milestones.

Name	Role (Team Member or Contributor)	Responsibilities	Expected # Hours

Getting to the Finish Line



# Shared Vocabulary





# Assessment Plan

- Keep Strategic Goals at the Forefront
- Systematically Track Progress
- Coordinate & Communicate
- Support a Sustainable Implementation Plan

# Assessment Plan

Goal/Objective	Medium	Frequency	Audience	Deliverable	Owner	Format
Inspiration & Tools to Support Data Collection & Use	Workshop	Quarterly	RCL Staff	Assessment Methods and Tool Review	iTeam	Presentation
	General Staff Meeting	Periodically	RCL Staff	Successful Use of Assessment Methods/Tools	iTeam	Lightning Talk
Regularly Collect & Document progress	Excel	Monthly	RCL Staff	Dashboard	iTeam	Electronic submission with supporting documents
Review Progress	iTeam Meeting	1 <sup>st</sup> Week of Month	iTeam	Review (& Reassign) Mapped Submissions	iTeam	Report
Identify Constraints, Performance Lags, New Strategies	iTeam/Project Manager Meeting	3 <sup>rd</sup> Week of Month	Coordinators	Progress Accomplishments Setbacks	iTeam	Brief
Report Findings & Recommendations	SLT Meeting	Quarterly	Strategic Leadership Team	Progress Report, Highlights/Exemplars, Necessary Pivots	iTeam	Presentation
	General Staff Meeting	Quarterly	RCL Staff	Progress Report, Strategic Plan Tie-Ins & Highlights/Exemplars	iTeam	Presentation

# Communication Plan

- Report Findings & Recommendations
- Provide Inspiration and Tools to Support Data Collection & Use
- Share Successes/Progress (Internally & Externally)
- Celebrate Wins/Successes



# Driving Change

Seeing & Feeling Momentum

# Accountability & Visibility



**Team Roles & Responsibilities**

**Stakeholders**

**Domain Expertise**

**Communication**

# Accountability Partners



# Rep Tools

- Technology & Check-Ins

**Rep Tools & Check-Ins**

Area	Technology	Check-Ins
Program		
Address - address, phone, email, etc.		
Notes		
Rep. assigned		
Start/End Date		

# Reporting Progress

Let's Take a Look!



## Implementation Progress

Please choose your project (required)

Collectors Diversity

### Milestone Progress

How many milestones does this project have? (required)

How many milestones are complete? (required)

### What progress has been made?

Progress Update 1 (required)

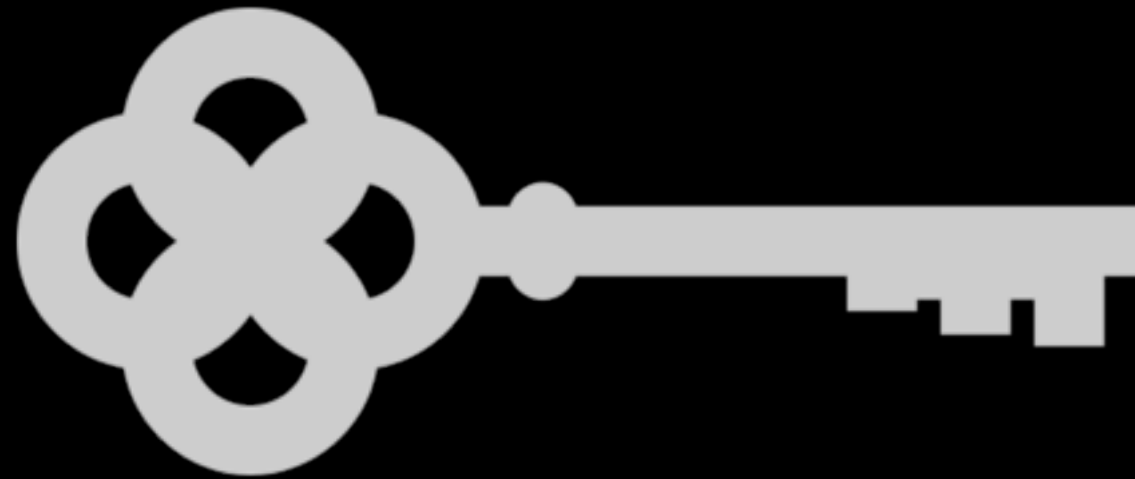
Progress Update 2

Progress Update 3

The background features a dark blue gradient with a complex, abstract pattern of black lines. These lines form a series of interconnected, irregular shapes that resemble a stylized honeycomb or a network of paths, creating a sense of depth and movement.

# Speed Bumps, Potholes & Flat Tires

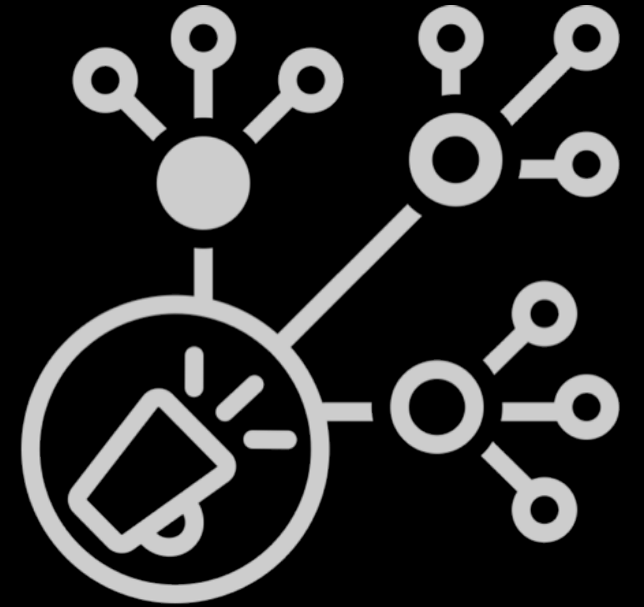
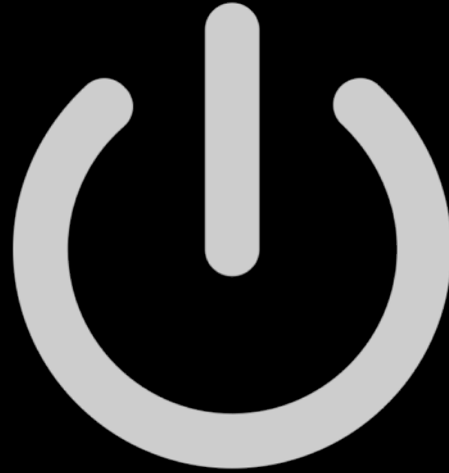
# Key Stakeholder Involvement





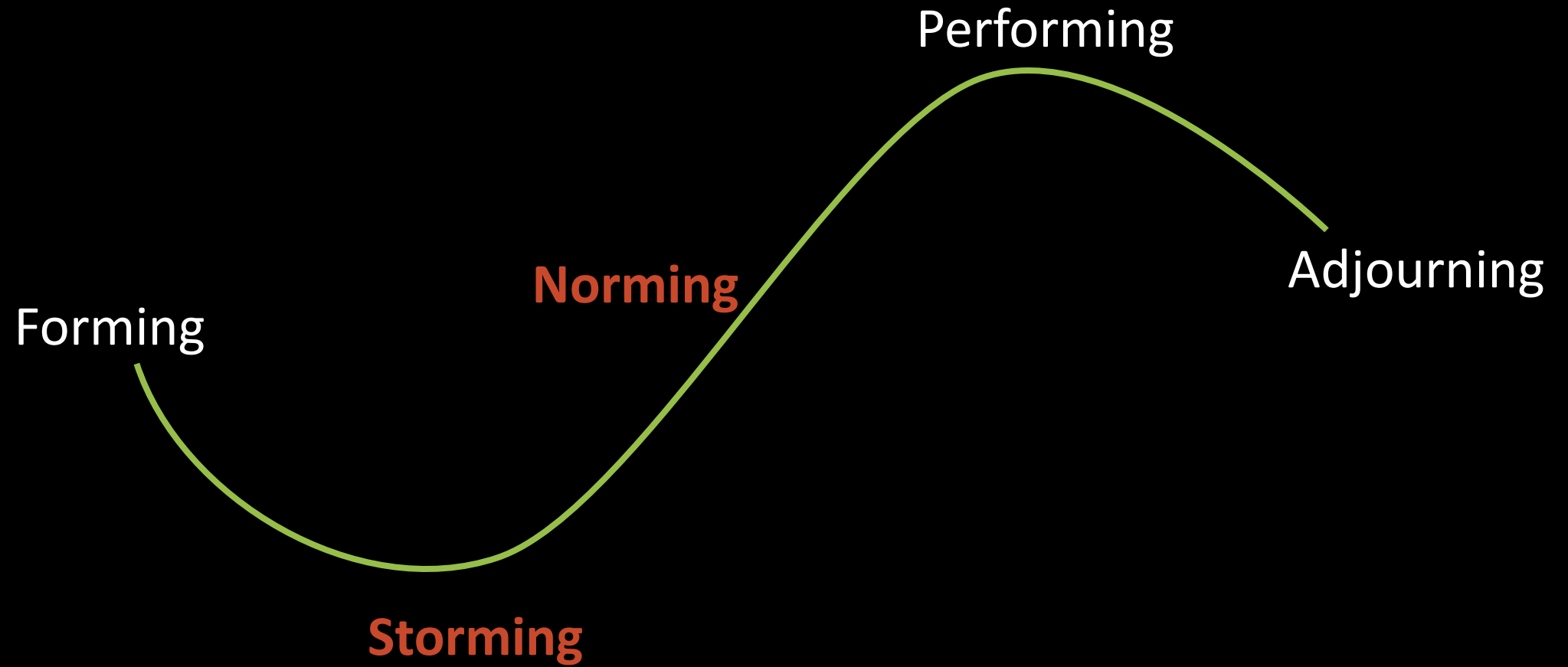
TRUST

POWER



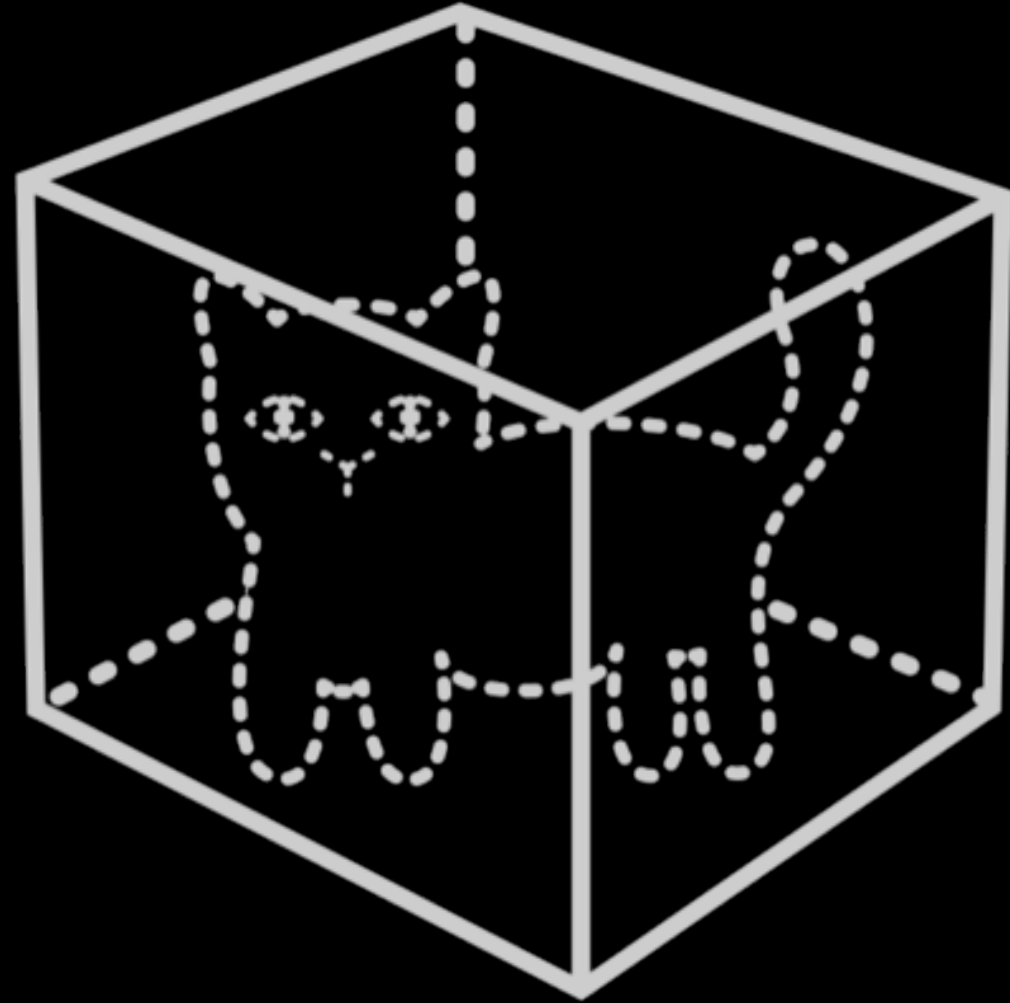
INFLUENCE

# Responses to Strategic Change



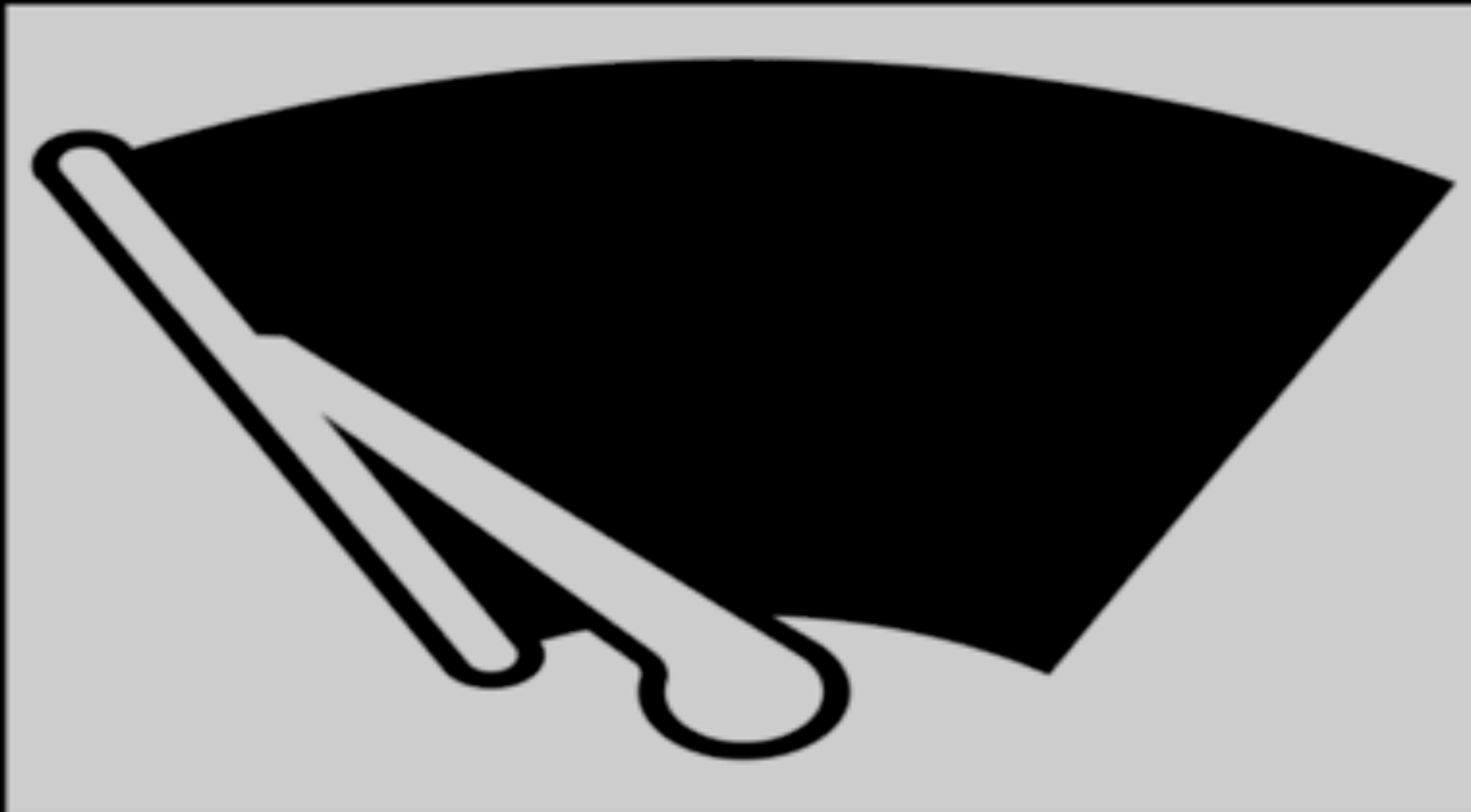
## Paradoxical Needs

- Structure vs. Flexibility
- Comfort with Ambiguity



# Assessing Implementation

# Dirty Windows





# Kicking in the Clutch

