

**Planning Cubed Report for CBE Strategic Planning Facilitation Team
(based on Planning Cubed Report for CBE Meeting June 4, 2019)**

Report Contents

Overview and Methods

Values & Outcomes

Process Options

Facilitation Team

Communication and Website

In reviewing materials from the Dean's Dialogues and stakeholder group interviews, we propose the following for approval:

Process Values

- Transparent
 - Accountable
 - Representative
 - Reliable communication in place/clear channels
 - Timeline is well-communicated
 - Resources identified and available
- Inclusive
 - Deep listening
 - Representative across multiple communities/groups
 - Efficient engagement/use of time and effort
 - Engages conflict productively
 - Stewards diversity and equity
- Collaborative
 - Builds community
 - Shared understanding
 - Engages conflict productively
 - Stewards diverse approaches and teams
- Equitable
 - Engage differences respectfully (disciplines, research, pedagogies...)
 - Space for multiple voices
 - Engages conflict productively
 - Efficient engagement/use of time and effort
 - Stewards diversity and inclusion
 - Representative

Plan Outcomes

- Aligned: Values, Vision, and Aspiration
- Inclusive: reflects conflict and agreement, multiple voices and pathways for engagement
- Collaborative: builds community, collective potential without requiring everyone to be on board
- Creative: multiple ways to engage, implement, and assess plan goals and strategies
- Develop/describe systems, staff, skills, and structure to support goals and strategies
- Identified Resources: identified and available to support diverse participants and approaches
- Clear Communication: clear, legible, and consistent communication and outreach strategies

Planning Process

As a process, based on our values, we propose the establishment of a Facilitation Team (F.T.) to steward the following process with the option for the retreats to be decided by the team and its facilitator:

Summer: F.T. Plans for Fall Retreat

- Training in Conflict Engagement
- Identify and hire facilitator (local, in UW?, in allied professions?)
- Create communication plan, establishing strong communication pathways and liaison roles
- Establish logistics, calendar
- Budget needs for process facilitation
- Plan for relevant input from all appropriate CBE stakeholders
- Plan fall retreat with facilitator
- Review full process

Fall Quarter: Starts Process

- September: F.T. meets to finalize plans for October retreat and planning process
- October 5, 2019: All CBE Retreat. Organization/facilitation provided by F.T./Facilitator.

Retreat Goals (based on UBC method/Scenario planning with themes and core areas)

- Activities: focused on scenario planning and then developing key themes
- Review vision/mission
- Address gaps in SWOT/SOAR/PESTLE (note we have not done threats)
- Identify and develop scenarios (funding, size, environment? FRC to determine type)
- From these analyses/scenarios, develop themes/opportunities and core areas
- Form task forces to address themes/opportunities and core areas

After Retreat: Work Groups, with support/coordination from F.T. and CBE

- Assure internal, academic, and external communities are included
- Engage community in multiple, inclusive ways
- Use diverse approaches for input and feedback (see “Feedback Mechanisms for Strategic Planning”)
- Establish draft for each core area:
 - Description/context
 - Goals (with communities impacted identified)
 - Strategies (Road Map?)
 - Resources needed
 - Metrics
 - Priority strategies for implementation and possible leaders for implementation
- Deliver Report to F.T. by January 10, 2020

Winter Quarter: F.T. and Task Groups

- Compile and synthesis reports
- Engage ALL communities (as much as possible) for feedback
- Refine implementation plans/metrics
- Respond to feedback, check in with work groups to assure they have a voice in feedback analysis

Spring Quarter: Facilitation Team, Task Group leadership, and CBE community

- Refine document (assign a writing task force comprised of leaders of previous core area work groups)
- Share with broader audience (be sure to include internal and external communities)
- Present for approval by Executive Committee and Dean
- Share for approval with full CBE community (internal)
- Share with external communities (PACs, Alumni, donors, and friends)

Facilitation Team

This is not a fully representative team nor is it a steering or director team. It is a facilitation team responsible for facilitating and stewarding the strategic planning process and outcomes. The F.T. will oversee the process to provide ample opportunities for leadership and participation by a broader and more representative community of the college.

Summer work:

- Training in Conflict Engagement
- Identify and hire facilitator (local, in UW?, in allied professions?)
- Create communication plan, establishing strong communication pathways and liaison roles
- Establish logistics, calendar, and budget
- Plan for relevant input from all appropriate CBE stakeholders
- Plan fall retreat with facilitator (vision/mission, scenarios, set agenda, goals)
- Review planning process, determine option A or B

Fall work:

- Facilitate Fall Retreat
- Facilitate and charge formation of work groups
- Engage students in process
- Assure junior faculty and staff participate with active support of chairs/ directors
- Assure multiple members of our external communities are engaged
- Refine and update communication plan

Winter work:

- Facilitate final report submissions
- Synthesize reports into one CBE plan proposal
- Facilitate sharing reports and establishing feedback mechanisms

Spring work:

- Determine writing team (preferably comprised of leaders from Core Area work groups)
- Refine document
- Share with broader audience
- Present for approval to Executive Committee and Dean
- Share for approval with full CBE community

This team shall be comprised of one person (faculty or staff) from each of the five departments plus two appointed by the Dean. Each department is charged to elect one person to facilitate the process and serve as a liaison to the Strategic Planning Process by serving on the Facilitation Team.

The Facilitation Team will then elect two members as co-chairs of the team to partner with Susanne Adamson to lead meetings and attend to the logistics of the planning process. Co-chairs will be responsible for communicating with College leadership.