

From Strategic Vision to Organizational Change Playbook

Preparing Your Institution to Make a Bold Change

Community College Executive Forum

3 Ways to Use This Resource

- Learn the eight steps required to drive a new, strategic vision for your institution
- Assess the barriers and risks to your vision's success
- Articulate the next steps needed to make the change

Change Readiness Assessment

Change of a visionary scale is never easy. Complete this diagnostic to ensure your institution is in the right place to tackle the challenges associated with institutional change. First, review each stage of institutional transformation, the desired outcome, and potential barriers. Next, record additional potential barriers that are unique to your institution and vision. Then, rate the risk these barriers pose to preparing your institution for the vision. Finally, articulate the next steps you must take to successfully complete this step.

1 Develop the Change Vision and Strategy

Desired Outcome

Understand the organizational imperative for change (i.e. the rallying cry) and ensure that dialogue occurs internally to gain buy-in around this urgency.

Potential Barriers

- Lack of clear understanding of the purpose for the change and impact on institutional objectives
- Missing the simple message (“elevator pitch” of why)
- Failure to spread message at the appropriate times (early)
- Unable to secure buy-in on the imperative across the leadership team, and pertinent staff
- Failure to explain that the vision is everyone’s job
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

2 Pull Together the Guiding Team

Desired Outcome

Build a program leadership team that has the authority, time, and necessary skills to lead the initiative forward.

Potential Barriers

- Failure to appoint the appropriate individuals to the leadership team
- Unable to rally key stakeholders from various departments to serve as champions and build engagement
- Failing to regularly meet as a group on initiative progress
- Failing to communicate roles and responsibilities of each stakeholder and set expectations
- Failure to establish a structure for change continuity and prioritization
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

3 Develop the Change Vision and Strategy

Desired Outcome

Develop a vision for successful outcomes and build a simple strategy for how that will be accomplished. Focus on developing the short mission statement and identify any relevant stories that contain an emotional connection.

Rating Risk (circle)		
HIGH	MED	LOW

Potential Barriers

- Failure to understand that for the change to be successful, it must be part of a wide initiative on campus
- Failure to define processes, frequency, and workflow
- Undefined vision of success or clear success metrics
- Failure to understand how this change and associated strategy will effect existing processes and initiatives
- Underestimating the magnitude of achieving a culture shift on campus
- _____
- _____
- _____

Your Next Steps

4 Communicate for Understanding

Desired Outcome

Develop a communication plan and materials that allow for a broad understanding of the why, what, and how.

Rating Risk (circle)		
HIGH	MED	LOW

Potential Barriers

- Failure to socialize the change before it is rolled out on campus
- Failure to engage all key stakeholders prior to rollout
- Failure to embed in regular conversations (and not just special meetings or via email)
- Lack of individualized messages for different stakeholders
- Failure to explain value of the change and communicate the impact on current workflows and processes
- _____
- _____
- _____

Your Next Steps

5 Empower Others to Act

Desired Outcome

Remove institutional barriers that prevent others from driving the initiative forward.

Potential Barriers

- Failure to empower key stakeholder during initial stages of adoption
- Failure to identify a path for feedback and incorporate staff feedback into action plan
- Failure to remove or streamline the institutional processes (e.g., silos, team structures, incentives) that act as a barrier
- Not identifying champions to sell the vision across campus
- Failure to tie vision activities and outcomes to individual responsibility for department and larger institutional goals
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

6 Produce Quick Wins

Desired Outcome

Identify and create quick wins that can help gain buy-in and generate momentum on campus.

Potential Barriers

- Leadership failure to define goals and desired ROI
- Leadership failure to own and drive project forward
- Failure to identify and capitalize on champions
- Failure to establish short-term quick win opportunities
- Failure to effectively train or supplement the training required for success
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

7 Don't Let Up

Desired Outcome

Ensure the initiative remains an organizational priority and is visible to the team. Recognize that there will be challenges but that they can be overcome.

Potential Barriers

- Failure to track and monitor efforts
- Not continuously identifying and building up champions on campus
- Not engaging with dedicated resources proactively to address needs before they become challenges
- Failure to incorporate the vision into recurring activities and define milestones
- Failure to communicate to leadership team and campus that this is an ongoing commitment
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

8 Create a New Culture

Desired Outcome

Sustain improvements and clearly associate demonstrated behaviors with success.

Potential Barriers

- Failure to demonstrate the connections between the new behaviors and goal successes
- Shifting organizational focus after initial goals achieved
- Failure to share overall organizational results more broadly
- Lack of recognition for staff who have made the greatest efforts
- Failure to capitalize on distributed ownership to push toward culture shift
- _____
- _____
- _____

Rating Risk (circle)

HIGH MED LOW

Your Next Steps

Change Readiness Summary

Please complete this summary after completing the diagnostic on pages 2-5. The goal of this exercise is to gain an understanding of what barriers may exist and prioritize accordingly.

Activity step	Summary	What is the level of challenge/risk to completing this step at your institution?		
Create a sense of urgency	Understand the organizational imperative for change (i.e. the rallying cry) and ensure the dialogue occurs internally to gain buy-in around this urgency	HIGH	MED	LOW
Pull together the guiding team	Build a program leadership team that has the authority, time, and necessary skills to lead the initiative forward.	HIGH	MED	LOW
Develop a change vision and strategy	Develop a vision for successful outcomes and build a simple strategy for how that will be accomplished. Focus on developing the short mission statement and identify any relevant stories that contain an emotional connection	HIGH	MED	LOW
Communicate for understanding	Develop a communication plan and materials that allow for a broad understanding of the why, what, and how	HIGH	MED	LOW
Empower others to act	Remove barriers that prevent others from driving the initiative forward, whether at the leadership or staff level	HIGH	MED	LOW
Produce quick wins	Identify and create quick wins that can help gain buy-in and generate momentum on campus	HIGH	MED	LOW
Don't let up	Ensure the initiative remains an organizational priority and is visible to the team. Recognize that there will be challenges but that they can be overcome	HIGH	MED	LOW
Create new culture	Sustain improvements and clearly associate demonstrated behaviors with success	HIGH	MED	LOW

Change Readiness Next Steps

Please fill out the table with next steps. When finished, share this document at strategy or committee meetings to garner cross-cabinet support and ensure continuity of efforts.

Organizational Change Phase	Notes
<p>Create a sense of urgency</p> <ul style="list-style-type: none"> • <i>What information do we need to communicate to cultivate urgency?</i> • <i>How can we connect these efforts with stakeholder's priorities?</i> 	
<p>Pull together the guiding team</p> <ul style="list-style-type: none"> • <i>Who are the consequential staff, and how do we coalesce them around this vision?</i> • <i>How will we structure this team (e.g., roles, responsibilities, meeting frequency)?</i> 	
<p>Develop a change vision and strategy</p> <ul style="list-style-type: none"> • <i>What is our vision statement, and how do we connect it to the campus?</i> • <i>What does success look like, and what are the means (e.g., processes, frequency, workflow) by which we achieve it?</i> 	
<p>Communicate for understanding</p> <ul style="list-style-type: none"> • <i>Why are we striving for this vision, and how will it impact the day-to-day?</i> • <i>Through what channels and mediums do we share this information to ensure impact and understanding?</i> 	
<p>Empower others to act</p> <ul style="list-style-type: none"> • <i>What internal barriers stand in the way of vision adoption?</i> • <i>How do we incent stakeholders to act?</i> 	
<p>Produce quick wins</p> <ul style="list-style-type: none"> • <i>What are the opportunities for early success?</i> • <i>What structures and training are necessary for these immediate wins?</i> 	
<p>Don't let up</p> <ul style="list-style-type: none"> • <i>What is the plan for tracking and monitoring efforts, successes, and new challenges?</i> • <i>What are the milestones of this vision, and what actions will we take once they're reached?</i> 	
<p>Create a new culture</p> <ul style="list-style-type: none"> • <i>How can we create an infrastructure that sustains this movement?</i> • <i>How do we connect vision actions with institution successes to ingrain the new vision?</i> 	