

## **DRAFT: Strategic Plan, 2021-2030: Implementation Plan**

### **Philosophy Statement:**

The purpose of the LCCC implementation plan is to install a process for continuous verification that validates the emerging truth of the LCCC Vision as articulated in the College's strategic plan. Continuous and formal verification will accelerate truth finding, save resources, and develop effective decision-making. Eventually, over time, continuous verification will help us to establish our belief that the Strategic Plan, its vision, and initiatives have an agreed upon truth. The most verified becomes the most true; verification reduces doubt and establishes belief. Belief leads to action to move forward. Alternatively, if verification of a strategic initiative reveals that there are no positive consequences, it is untrue and should be discarded.

### **Overview:**

As part of the strategic planning process, it is critical to understand how we will implement the strategic goals, strategies, and strategic initiatives. To do this, we developed this implementation plan (a working document) that addresses the steps and planning to carry out our strategic plan. The plan provides some guidance, processes and tools for helping cabinet members track progress on initiatives and projects. The plan will not be distributed widely because it functions at the operational level and will change as needed over time.

The implementation plan will include activities such as prioritization and sequencing of strategic initiatives, forming accountability for initiatives, appropriate budget development, communication planning and risk analysis. Each strategy is broken down into strategic initiatives within the strategic plan thus allowing for detailed planning and resource identification. The strategic plan transitions to operational activity at the initiative level, including projects and non-project tasks.

To formalize reporting and monitoring of progress on initiatives, we are using the project management process and have adopted a technology solution known as Smartsheet. The project management office will provide project templates including but not limited to the following: project charter, project status report, project kick-off agenda, communication plan, and others. The Project Management Office will provide a training program to help selected individuals learn about project management methodologies. The goal is to have the trainees understand project management to support campus projects in various capacities.

Smartsheet will include tools to track progress on projects, issues and risks and budgets. The Smartsheet tool will allow the college to track the progress on the strategic plan, view progress on projects, view dashboards by cabinet member, and by goal. The sharing and editing of project documents will be handled using a SharePoint site. Please see Appendix III for more information on how Smartsheet will be used.

### **Accountability and Responsibility**

To ensure vitality of implementation, this plan describes who oversees broad activity for initiatives and who is responsible for completing actionable tasks and projects that

operationalize an initiative. Consistent accountability reinforces agile and robust responsiveness to the verification findings.

#### Cabinet Role:

- Prioritize and sequence initiatives
  - Use rubrics (use prioritization rubric – existing from previous strategic plan 2013-2020) to evaluate the priority of initiatives and projects - high, medium and low. Sequencing will determine when specified initiatives will start up.
- Identify a Cabinet member to sponsor each initiative
- Use existing budget process for funding initiatives
- Resolve resource disagreements
- Approve additional funding through PM change management process

#### Individual Cabinet Member Role:

- Accountable for the initiative
  - The cabinet member will analyze, prioritize and sequence the projects and non-projects (tasks) of their “assigned” strategic initiatives.
- Approves projects and tasks
- Prepares narratives for each of their "assigned" initiatives
  - The implementation plan directs each initiative sponsor (a Cabinet member) to develop an initiative planning summary that describes how the initiative will be implemented, prioritizing and sequencing the projects and non-projects (tasks), communicating responsibility for tasks and projects, advocating for usage of tasks and project management, describing timelines, and determining resources. The summaries facilitate communication and provide a story line for implementation experiences.
- Identifies relationships with other initiatives (e.g., dependencies)
- Relates strategic initiatives to the functional area work for operational integrity
- Assigns qualified project leads or co-leads to projects and/or to tasks. He/she may need to negotiate with other Cabinet members for resources
- Attends training overview for Smartsheet and PM process

#### Individual Project Lead (co-leads) Role:

- Selects project team members
- Attends training
- Understands and uses the PM process including the project charter, communication plan, budget planning, stakeholder identification, etc.
- Uses Smartsheet project management setup
  - Plan project timeline, milestones reporting on budget, issues and risks, and status reporting
- Uses SharePoint as the project document repository (storage of important project related documents such as the project charter, stakeholder register, communication plan, meeting agendas and minutes)

### **Budget Development**

Implementation planning includes a budget development process for recording forecasted start-up costs, documenting the original revenue provided for an initiative and recording expenditures during a project’s duration. A project change management process is used for approving additional funding for a project’s budget. After the project lead ensures the added funding meets the project requirements and

scope, the project lead will present the additional funding request to the project sponsor for eventual cabinet approval or denial of the additional funds for the project. The project leads (co-leads) will be responsible for developing their project and non-project task budgets for the strategic plan projects. Most of the strategic plan projects will use existing annual LCCC budget processes. They include:

- Operational budget
- New positions
- One-Time funds
- Innovations funds
- Minor maintenance funds

All projects for an initiative will have an itemized budget appearing in Smartsheet and regular monitoring and record keeping will be undertaken using this software. Please refer to the Smartsheet section in this document. Smartsheet will include the percent of budget expended on each project dashboard. The project sponsor and the project lead (co-leads) will research and develop budget estimates based on the data that is available at the time of the project start. The project leads will be responsible for managing the project budget throughout the implementation.

Tasks do not require a formal itemized budget; however, there will be a budget amount field within the task sheets in Smartsheet where Cabinet members or their task leads will provide notes on individual cost items.

## **Strategic Plan Communication Plan**

### Strategic Plan Communication

- Institutional LCCC website for publishing completed plan, general public information
  - How implementation will work (in-service; Website visibility, Marketing & Communications press release, WY Tribune Eagle, Channel 5, town hall)
- Do we publicize the prioritization of the initiatives or is it just part of the implementation plan (which is not public)?
- Internal (LCCC community only) Smartsheet published dashboard for sharing Strategic Plan progress
- Annual status updates on projects and/or the total plan?
- Timeline for Strategic Plan refresh
  - Annual
  - Cabinet retreat annual / bi-annual?
  - Larger group for annual review by sponsors and PMs

### Project Level Communication

- As part of the project management process, the project leads will develop a communication plan outlining how and when they will communicate with the project team and other stakeholders. Generally, the strategic plan project lead will communicate to their project sponsors and cabinet members regularly (multiple times per semester and likely more frequently) depending on the need of the project. Project leads should have regular communication and meetings with their project team to keep

the project on track and provide guidance to team members in accomplishing their work on time.

- Additionally, project leads will also have the benefit of the Smartsheet dashboards that automatically update based on their management of the project timeline, budget sheet and risk and issue log. Each project will have a SharePoint site setup for collaboration with their team. This will allow team members to view and edit project documents and create a repository of documents for the project.

#### Non-Project Task Communication

- Minimal communication needed – status report to cabinet member sponsor as needed.

## Appendix I

### Strategic Planning Roles, Terms and their Definitions

#### Project Sponsor

The project sponsor is an individual (often a manager or executive) with overall accountability for the project. He or she is primarily concerned with ensuring that the project delivers the agreed upon business benefits and acts as the representative of the organization, playing a vital leadership role through a series of areas:

- Provides business context, expertise, and guidance to the project manager and the team;
- Champions the project, including “selling” and marketing it throughout the organization to ensure capacity, funding, and priority for the project;
- Acts as an escalation point for decisions, issues and knowledge that are beyond the authority or experience of the project lead/manager;
- Acts as an additional line of communication and observation with team members, customers, and other stakeholders; and
- Acts as the link between the project, the business community, and strategic level decision-making groups.

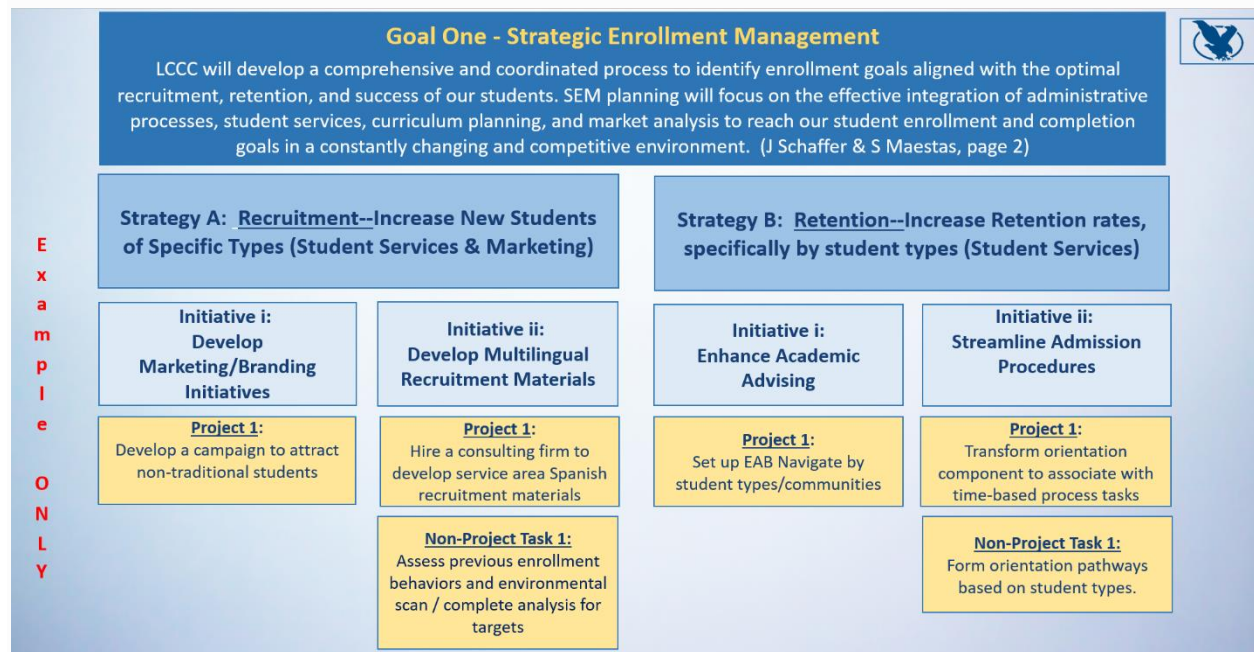
#### Project Lead (Project Manager)

The person assigned by a cabinet member to lead the team that is responsible for achieving the project objectives. He or she is responsible for the successful initiation, planning, designs, execution, management, and closure of a project. As part of the training for project leads, they will become familiar with useful templates to help manage their project and learn to navigate Smartsheet. The Smartsheet tool will include the project timeline, budget sheet and risk and issue log.

#### Non-Project Task Lead

A task lead will be assigned by a cabinet member and is responsible for completing the task that is related to an initiative in the strategic plan. Non-project tasks do not require the project management process or completion of templates. Smartsheet will be used to document basic information such as the task name, start and end dates and the person responsible for the task.

# Strategic Plan Hierarchy Definitions



## Goal

A goal is “what” the institution wants to achieve. A goal is a specific target, destination, or an end result. It is a major step in achieving the mission and vision of the institution.

## Strategy

A strategy is a plan of action for “how” to achieve a goal that is usually major, comprehensive and long-term. Strategies are where institutions put their efforts in order to achieve the institution's goals.

- Direction in broad statements
- How you expect to win
- It also identifies the games you aren't playing
- These are the things that will change the game
- Clarifying which systems need to be top notch keeps everyone on the same page and investing in the right resources.

## Strategic Initiative

A strategic initiative implements a strategy and guides project performance. A strategic initiative sets in motion a related series of work tasks coordinated to support achievement of a strategy. Strategic initiatives are the means through which an institution translates its goals and visions into practice and brings benefits to its stakeholders.

*Example: Develop and deliver a strong, holistic system of student advising that assigns every student a single case manager to follow him/her throughout their educational journey.*

## Project

A project defines the work plan of an initiative. It is a temporary endeavor undertaken to create a unique product, service, or result. A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources. Projects are instruments that support strategic initiatives.

<p><b>Project Definition</b> A temporary endeavor undertaken to create a unique product, service, or result.</p> <p>A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Navigate</li> <li>• Recruit</li> <li>• Badgepass</li> <li>• Pathways</li> <li>• CBORD</li> </ul>	<p><b>Project Characteristics</b></p> <ul style="list-style-type: none"> <li>• Every project is unique</li> <li>• A single definable purpose, end-item or result</li> <li>• Projects are temporary activities</li> <li>• Projects cut across organizational lines</li> <li>• Projects involve unfamiliarity</li> <li>• Something is at stake when undertaking a project</li> <li>• The process of working to achieve a strategic initiative</li> <li>• Defined scope</li> <li>• Usually have a budget description</li> </ul>	<p><b>A Project is NOT</b></p> <ul style="list-style-type: none"> <li>• Part of normal operations of a business or organization</li> <li>• A process that repeats regularly in an organization</li> <li>• Work that we do which is routine and regular</li> </ul>
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## Non-Project

A non-project task does not warrant project management processes and structure. Non-projects have low complexity; please see the table below.

<p><b>Non-Project Tasks</b> Tasks that are necessary to accomplish a strategic initiative.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>• Organizational restructure</li> <li>• Create a new position</li> <li>• Purchase a set of furniture</li> <li>• Complete a white paper</li> <li>• Gather data requirements and create a report from internal or external sources</li> </ul>	<p><b>Non-Project Characteristics</b></p> <ul style="list-style-type: none"> <li>• Unlikely to have a budget to accomplish the task</li> <li>• Minimal approvals required by cabinet or administration</li> <li>• Minimal supervision for completion</li> <li>• Can be clearly described using a few sentences</li> <li>• Has a start date and end date</li> <li>• One or two deliverables; one or two milestones</li> <li>• Local area expertise/knowledge is in place</li> </ul>	<p><b>A Non-Project task is NOT</b></p> <ul style="list-style-type: none"> <li>• A project</li> <li>• An activity taking a long time period to complete</li> </ul>
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	<ul style="list-style-type: none"><li>• Only one or two functions involved</li><li>• Simple monitoring required - tracking % complete</li><li>• Low risk activities</li><li>• Straightforward and familiar to the organization</li></ul>	
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## **Appendix II**

### **Project Management Terms and Definitions**

#### **Project Management**

The application of knowledge, skills and techniques to execute projects effectively and efficiently. It is a strategic competency for organizations, enabling them to tie project results to institutional goals and priorities.

#### **Project**

It is a temporary endeavor undertaken to create a unique product, service, or result. A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources.

**Project Sponsor - see Appendix I for definition**

**Project Lead (Project Manager) - see Appendix I for definition**

**Non-Project Task Lead - see Appendix I for definition**

#### **Milestone**

Milestones can either be defined by specific tasks, events and decisions, or a cumulative point in time reached because of specific tasks, events and/or decisions. Most commonly, project milestones are characterized by one or more of the following:

- Highly significant tasks, events or decisions.
- A significant checkpoint or phase in the project lifecycle.
- A specified "percent complete".
- Completion of one or more deliverables.

Any significant circumstance unique to a given project.

## **Project Charter**

A document that serves as a focal point throughout the project. These charters will be updated throughout the lifecycle of the project. The purpose of a project charter document is to document the following: Reasons for undertaking the project (institutional need and description)

- Institutional need
- In-scope and out-of-scope items
- Identifies requirements, deliverables, objectives, assumptions and constraints of the project
- High level risks
- Milestones
- The project team
- Communication plan
- High level budget
- And more

## **Issue**

Issues are defined as anything that arises in the project that needs to be dealt with to ensure the project runs smoothly.

## **Risk**

Risks are defined as uncertain events or conditions that may affect the project outcomes.

## **Dashboard**

Dashboards are a reporting mechanism that aggregates and displays metrics and key indicators so they can be examined at a glance by all possible audiences.

## **Predecessor**

When managing a project timeline, it is an activity that logically comes before a dependent activity in a project timeline.

## **Stakeholders**

An individual, group or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project or program.

## **Project Plan**

Project Plan and Timeline is used to further detail out the project activities involved and will be monitored and updated regularly throughout the lifecycle of the project. Details include:

- Task identification
- Estimated start and end dates (duration)
- Resource assignments

- Dependencies
- Milestone identification

## **Project Management Lifecycle**

Project Management Lifecycle has four phases: Initiation, Planning/ Design, Implementation, and Closure. There are variations to this definition, but the most basic definition includes these phases. (Note: The Project Management Institute (PMI) has 5 phases: Initiate, Plan, Execute, Control and Monitor, and Close)

## **Project Phases**

### **Initiation Phase**

Initiation Phase may originate at the direction of the College as an assigned project or by staff or faculty. This is the idea phase in which a project is proposed.

### **Planning /Design Phase**

The planning phase is when the project plans are documented, the project deliverables and requirements are defined, and the project schedule is created. It involves creating a set of plans to help guide your team through the implementation and closure phases of the project.

### **Implementation Phase**

Implementation Phase is where the team will execute the project plan. In this phase, it is important to monitor the tasks on the project, track the schedule and budget to make sure the project is progressing as planned.

### **Closure Phase**

Closure Phase needs to cover the following key areas: an end of project report to assess if project objectives were met, post project follow ups, and lessons learned.

## Appendix III

### Smartsheet Setup and Use for Strategic Project Management

The implementation of the Strategic Plan is supported by using Smartsheet for tracking project schedules, budgets, and risks and issues. Progress toward the goals will be displayed on dashboards in the Smartsheet platform. Additionally, the cabinet members have their own dashboards to visually see the projects under their respective areas. Even though the strategic projects will have % complete tracking specific for the project level, the progress on the goals will be manually updated for progress toward completion.

In order to have the Smartsheet dashboards populated, we will need to have the Goals and Strategies defined with strategic initiatives and projects entered into Smartsheet.

- If a strategic initiative is part of the strategic plan when the plan is approved, the PMO will enter the information into Smartsheet. This will generate the structure to add projects to the strategic initiative as needed.
  - If there is a project associated to the strategic initiative at the onset of the strategic plan, this will also be entered into the Smartsheet setup.
    - The project sponsor and the project lead will need to be identified in order to be setup in Smartsheet.
    - The project lead will need to participate in the Smartsheet overview and the project management training offered by the PMO in order to manage their project using the Smartsheet templates.
- If a strategic initiative is approved at a later date, the cabinet member will need to contact the Project Management Office to enter it into Smartsheet. Additionally, projects associated to the initiative will be entered into Smartsheet.

#### Smartsheet Strategic Initiative and Project Naming Convention

In order to organize the Smartsheet setup and create a recognizable way for everyone to understand how initiatives and projects are organized within the strategic plan, there will be a standard way to name initiatives and projects.

The strategic plan will have goals named goal 1, goal 2, goal 3, and goal 4. Under each goal, there will be strategies: strategy A, strategy B, strategy C etc. Under each strategy, there will be strategic initiatives: strategic initiative i, strategic initiative ii, etc. Then under each strategic initiative there will be projects, and or non-project tasks. These will be named with a prefix of the goal number, the strategy letter, and the strategic initiative letter and then a project number.

For example:

1Aip1 (goal 1, strategy A, strategic initiative i, project 1 – p1)

1Ainp1 (goal 1, strategy A, strategic initiative i, non-project task 1 – np1)

## **Managing Strategic Plan Projects**

When a strategic project is approved to launch, the project will be created in Smartsheet with an assigned project lead and project sponsor. Each project launched must be associated to a strategic initiative. The PMO will create the project templates and share them with the project lead, project sponsor and the cabinet member. The project lead will then use Smartsheet to manage the project with a project plan template sheet, a budget sheet, and a risk and issue log. These sheets will roll-up into other sheets to help populate the dashboards.

In addition to using Smartsheet to manage and report on project progress, the project lead should also use appropriate supporting project templates to aid in the management of the project. The PMO will make these templates and processes available for project leads to use. Some of the most useful templates are the project charter, project status report, meeting agendas, stakeholder registers, and the communication plan template. Each project that falls under the strategic plan should use a SharePoint site to store their documents and share information with their stakeholders and project team. The project lead can request the SharePoint site through the Project Management Office.

There will be some guidelines created to help summarize the percent complete at the initiative level.

## **Strategic Planning Smartsheet Setup Overview**

The Smartsheet setup includes the ability for a strategic plan project manager / lead to manage their project with a project plan template, a risk and issue log, and a budget tracking sheet. These three sheets will help project managers keep their project on track and on budget. These three sheets feed the hierarchy of dashboards in Smartsheet for the strategic plan. Without the lowest level (the project level) information kept up to date, these other dashboards will not have populated information.

The information will be setup in Smartsheet to populate appropriately into all of the dashboards. The navigation capabilities are built into the dashboards so it is easy for individuals to click on an icon to see a higher or lower level of information.

## **Training**

The PMO will offer training on the Project Management Process and how to use the Strategic Plan Smartsheet setup for project leads, sponsors and cabinet members.

The training will include:

1. Overview of the Project Management Process
  - a. Project management basics
    - i. Project management lifecycle overview
    - ii. Project manager role
    - iii. Project sponsor role

- iv. Team members
    - v. Stakeholders / Customers
  - b. Project management best practices
  - c. Project templates and location
    - i. Project Charter
    - ii. Stakeholder register
    - iii. Communication plan
    - iv. Kick-off agenda
    - v. Project status updates
  - d. SharePoint project site
    - i. Team collaboration
    - ii. Document repository for project documents
    - iii. How to navigate in SharePoint
    - iv. Setting permissions and adding members to your project site
    - v. SharePoint strategic project landing page (hub)
- 2. Smartsheet Overview
  - a. Access and login information
  - b. Strategic plan projects
    - i. Basic Navigation in Smartsheet
    - ii. Overview of dashboards and how information is populated
    - iii. Smartsheet Project Plan Sheet (timeline and task list)
    - iv. Smartsheet Budget Sheet
    - v. Smartsheet Risk and Issue Sheet
  - c. Online (through Smartsheet) training resources and tutorials

### **Support and Help for Strategic Projects**

The Project Management Office will support project leads and cabinet members with using the Smartsheet tool and the project management templates to manage the strategic plan projects and non-project tasks.

The PMO will setup the project templates in Smartsheet, provide training on how to use the Smartsheet tool, provide high level project management (PM) training, provide training on how to use the templates, but will not be responsible for managing all strategic plan projects. However, the PMO will be available to provide coaching and support for strategic plan project leads as requested.

The project leads (co-leads) and cabinet members can contact the PMO in the following ways:

Email: Julie Gerstner, [jgerstne@lccc.wy.edu](mailto:jgerstne@lccc.wy.edu); Ph: 307.778.1362

Email: Amanda Newell, [ANewell@lccc.wy.edu](mailto:ANewell@lccc.wy.edu) ; Ph: 307.778.1181

Email: [pmo@lccc.wy.edu](mailto:pmo@lccc.wy.edu)

### **Project Management Trainee Program**

The PMO will offer training and mentoring to select individuals across campus to support projects and initiatives at LCCC. Since the current economic environment does not support having additional full-time staffing in the department, this model will embark on a journey to identify, train and mentor existing employees from other departments to act as project managers for efforts across campus.

The PM program would require candidates to be with LCCC for at least one year and working within their department for one year.