Action Planning Worksheet

Complete the Work Plan for Each Phase

Copy and paste the blank table for each phase you identified. Add additional rows to each table, as needed.

Phase One Work Plan – Information Gathering and Process Revisions
Summer 2019 Planning Phase – These items are targeted plans developed from input derived from Campus Site Visit #1 and the ZOOM conference with ATD Coach Jennifer Hill-Kelley. Important preliminary goals include developing institutional vision around HSS work, process mapping the student experience (current/real v. ideal/perceived), establishing a framework for onboarding/advising, and completion of a communication audit (visit notes). We also want to emphasize knowing our students, their communication preferences, and take action steps toward advising redesign (ZOOM call).
Related major goals 1. Communicate about this work on campus 2. Create intake form 3. Redesign SOAR and create Rocket Launch 4. Establish relationship with community resources
Measurable indicators of progress by *year, term, or month*: **SOAR Outcomes** All new incoming students are ready and prepared to start learning before the first day of class (i.e., registered for classes, financial aid completed, accessed student email, parking permit obtained, housing reserved, intake form completed). **Intake Form Outcomes** All new incoming students will share their needs and issues with the college before Rocket Launch so they can be more prepared, knowledgeable and aware of resources. **Rocket Launch Outcomes** 1. All new incoming students will be aware of campus and community services and how to access them at the conclusion of Rocket Launch. 2. All new incoming students will be connected to resources by midterm of the first semester. 3. All new incoming students are aware of the qualities of successful college students. **4.** All new incoming students learn more about their academic program at Rocket Launch.

Major Milestone/Activity	Key Steps	Start Date	End Date	Completion Date	Lead Staff Member(s)	Resources Required	Progress Notes
SOAR -- All new incoming students are ready and prepared to start learning before the first day of class (i.e., registered for classes, financial aid completed, accessed student email, parking permit obtained, housing reserved, intake form completed).							
Identify members of SOAR team	Which areas of campus should be represented? (Fin Aid, IT, Advising, Bus Office, Faculty, Intake Team, ????) Educate them about purpose of team and SOAR Invite them to participate Schedule first meeting	Dec 2019	Jan 2020	January 15, 2020	Jenny Sanders		12-10-19 proposed committee: Include Beverly Ellis (advising), Fin Aid, Lisa Holland (Business Office), Courtney Haygood (Housing), Laura Johnson (IT), Kim Coker (marketing), Bailey Carl (Admissions), Divesh (faculty), Sara Landaverde (faculty), Jenny Sanders (chair) meeting invitation sent 12/13/19 meeting scheduled 1/9/20--rescheduled for 1/15/20 Team decided to add a student who has previously attended SOAR to the team--Elizabeth Self
Identify who needs to attend SOAR	Define who attends, take others out Mandatory or not? Approval needed? Should there be "excused" absences? Tracking system for excused absences? Who "excuses" them? What qualifies as an "excused" absence? Consequences for not attending IF mandatory How will they get the information if they do not attend?	Jan 2020	Jan 2020		Jenny Sanders	Executive Cabinet (if requesting to make mandatory)	Recommendation was to make SOAR mandatory for all first time entering freshmen. Situations including geographic location, travel/vacation schedule, or work schedules would be reasons to be "excused." The key activity will be registration for class. Students registered outside of scheduled SOAR dates will still need to complete the additional SOAR tasks at the time of registration.

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Major Milestone/Activity	Key Steps	Start Date	End Date	Completion Date	Lead Staff Member(s)	Resources Required	Progress Notes
							Still need to determine WHO will excuse a student from attendance and a tracking system for completion of alternate format.
Decide if we need to create alternatives to SOAR in person	If mandatory, what is the alternative? What do other schools do in this situation?	Jan 2020	Feb 2020		Jenny Sanders	John Grant--shared how his college handles students who do not or are unable to attend SOAR	
Identify the learning outcomes of SOAR	Identify the content to be covered What do we want them to learn/accomplish at SOAR? Establish outcomes Create "syllabus"	Jan 2020	Feb 2020		Jenny Sanders Sara Landaverde		
Develop marketing plan	When should SOAR be marketed? How should students be told about SOAR? Adjust the message (mandatory vs encouraged)	Jan 2020	Feb 2020		Kim Coker Jenny Sanders	Postcards, flyers, email, social media, posters, etc.	
Identify evaluation measures	Identify what is being measured Determine how to assess What determines success at SOAR? Pre-/Post- survey? Checklist of activities?	Jan 2020	March 2020		Valerie Wilson Sara Landaverde		
Design and build alternate format (if needed)	Decide on format Identify content Build	Jan 2020	May 2020		Traci Rushing Jodi Eppinette	Brightspace?	

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Develop and implement training for SOAR tour guides and all staff involved	Create script for tour guides Share syllabus with volunteers—what are we trying to accomplish with SOAR Identify specific *positive* ways to frame intake survey for students Schedule training session	Jan 2020	May 2020		Jenny Sanders Jodi Eppinette Rebecca Hughes	Previous tour guides	

Holistic Student Supports Redesign Toolkit

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Communicate changes to campus partners	Share with the campus what changes we are making COMMUNICATE—don't assume—that everyone knows what is going on at SOAR and what is to be accomplished	Jan 2020	August 2020		Jenny Sanders Kim Coker	Emails Brief meetings	
Design sequence of events for SOAR	What order should students go to various offices/stops?	Feb 2020	April 2020		Jenny Sanders		
Recruit staff to volunteer and help	What are the characteristics of a strong tour guide? Solicit faculty—leverage the champions who have volunteered in the past Use students? (Ambassadors, Scholars, etc.)	Feb 2020	April 2020		Jenny Sanders	Previous faculty guides List of ambassadors and Scholars	

Major Milestone/Activity	Key Steps	Start Date	End Date	Completion Date	Lead Staff Member(s)	Resources Required	Progress Notes
INTAKE SURVEY -- All new incoming students will share their needs and issues with the college before Rocket Launch so they can be more prepared, knowledgeable and aware of resources.							
Review the team composition	Determine who the key stakeholders/referrals are What input is needed from team? Invite and explain purpose of team and intake	Dec 2019	Jan 2020		Wayne Banks	List of resources Student for input	
Reach out to other institutions about their intake survey process and look at their questions	Identify colleges that do this work well Determine a contact person Determine what we want to know from them Reach out to them	Dec 2019	Jan 2020		Wayne Banks		
Investigate solutions for managing data from intake survey and connecting students to services	Is this Starfish or something else?	Dec 2019	March 2020		Valerie Wilson Marcus Copeland		
Create map linking questions/items to the resource who needs the information	Review which resources/personnel need to receive intake survey information How do the results need to be presented to resources to be useful? How is the reach out going?	Dec 2019	March 2020		Wayne Banks Community Resource Chair	List of resources with contact info Survey? Meeting?	
Evaluate the survey responses for this current survey	Identify which items are yielding valuable data and which ones are not Review feedback received to date	Jan 2020	Jan 2020		Valerie Wilson Lee Sanders		
Ask students for feedback who took survey in summer	Determine what info we want to receive from them (expectation/understanding of survey, length, question clarity, feeling after completion, follow through, etc.) What is it about the student experience with the intake survey that would help improve the process? Identify students who took the survey Schedule focus group meeting to solicit feedback	Jan 2020	Feb 2020		Wayne Banks	List of students who completed intake in 2019	
Obtain feedback from resources partners about wording of questions	What questions will yield valuable information for resource partners?	Jan 2020	Feb 2020		Wayne Banks	List of community/campus resources Schedule meeting?	

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| Plan to connect students to services as the result of the survey responses | How/when will we connect students to services…particularly the services not housed on campus? | Jan 2020 | March 2020 | | Wayne Banks | | |

Major Milestone/Activity	Key Steps	Start Date	End Date	Completion Date	Lead Staff Member(s)	Resources Required	Progress Notes
Develop evaluation plan	What data shows that the intake survey helped connect students to needed surveys? How will we know the student did something after the referral to service and attend the service? Do the service areas already track something?	Feb 2020	April 2020		Wayne Banks		
Train staff that receive the survey results on what should happen once results are received	Establish written policy/procedure for follow-through Schedule training meeting for all referrals	March 2020	May 2020		Wayne Banks	Reserve room for training Printed copies of procedures/plan	
Create message to share with students about intake	What do we want to tell students about the intake survey and follow through? What message will elicit the most honest results? When/where will we share that message with them? How do we evaluate the impact of messaging after implementation? Does the name of the "intake survey" impact that message?	March 2020	May 2020		Kim Coker Jenny Sanders		

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ROCKET LAUNCH 1. All new incoming students will be aware of campus and community services and how to access them at the conclusion of Rocket Launch. 2. All new incoming students will be connected to resources by midterm of the first semester. 3. All new incoming students are aware of the qualities of successful college students. 4. All new incoming students learn more about their academic program at Rocket Launch.							
Develop marketing plan	When should Rocket Launch be marketed? How should students be told about Rocket Launch? Adjust the message (mandatory vs encouraged) Communicate to campus	Dec 2019	April 2020		Kim Coker	Develop marketing plan	
Review team composition	Identify the key stakeholders/referrals What input is needed from team? Explain purpose of team , Rocket Launch, and intake Invite to attend Schedule meetings	Jan 2020	Jan 2020	January 15, 2020	Jenny Sanders		12-10-19 proposed committee: Jodi Eppinette (faculty), Scotty Morrison (faculty), Bailey Carl (Admissions), Wayne Banks (intake chair), Community Resources chair, Courtney Haygood (Housing), Jenny Sanders (chair), Hannah Dixon (advising), Kim Coker (Marketing) meeting invitation sent 12/13/19 meeting scheduled 1/9/19; rescheduled 1-15-20 Team decided to add a student--Morgan Lindsey
Identify the learning outcomes of Rocket Launch	Identify the content to be covered Establish outcomes Create "syllabus"	Jan 2020	Feb 2020		Sara Landaverde		
Who should attend?	Housing only? Full time first time? Degree seeking? Transfer? All?	Jan 2020	Feb 2020	January 15, 2020	Jenny Sanders		Recommendation was made for all first time at Tech, degree seeking students would be required to

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							attend. This would include transfer students as faculty and others believe those students need the content as much as freshmen.
Mandatory attendance?	Mandatory? Approval? If mandatory, what constitutes an "excused" absences? Who tracks excused absences? Consequences for not attending? Tie participation to Student Success?	Jan 2020	Feb 2020		Courtney Haygood Jenny Sanders	Executive Cabinet if approval for mandatory needed	Recommendation was made for all first time at Tech, degree seeking students would be required to attend. Situations including late registration (after Rocket Launch), work or childcare schedule, geography, taking classes completely online, etc. would constitute an excused absence. A grade in Student Success would be based on completion of the in person or online version of Rocket Launch to enforce attendance. Still need to determine who tracks excuses.
Faculty role	What is their role? What does that role look like? Goals for faculty involvement? Specific curriculum for faculty sessions? Communicate vision and plan with faculty	Jan 2020	March 2020		Sara Landaverde Jodi Eppinette Jenny Sanders	Input from faculty	
Establish evaluation plan	Identify what is being measured Determine how to assess What determines success at Rocket Launch?	Jan 2020	March 2020		Valerie Wilson Sara Landaverde		

Major Milestone/Activity	Key Steps	Start Date	End Date	Completion Date	Lead Staff Member(s)	Resources Required	Progress Notes
Determine effective way to connect students to resources at Rocket Launch	How will we actually make the connection? More than just knowledge that resources exist	Jan 2020	March 2020		Jenny Sanders Wayne Banks		

Holistic Student Supports Redesign Toolkit   **Achieving the Dream**

Create alternative format for those who cannot attend (excused and fully online)	How do you tie them to academic programs and resources if not present? Decide on format Identify content Build	Jan 2020	May 2020		Courtney Haygood Jenny Sanders	Center for Online Learning (Brightspace)?	
Establish agenda	How does the agenda help connect students to their program and help prepare them?	Feb 2020	April 2020		Jenny Sanders		
Provide training for faculty and others involved in Rocket Launch	Share syllabus and desired outcomes Review agenda COMMUNICATE—don't assume—to ensure they know what should happen at Rocket Launch	April 2020	August 2020		Jenny Sanders		

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                        Dream Core Team
                        Valerie Wilson &
                         David McLeane

  Community    Intake Survey    Data        SOAR       Rocket Launch   Mentoring      Communication
  Resources    Wayne Banks   Valerie Wilson Jenny Sanders Jenny Sanders Jodi Eppinette   Kim Coker
     ???
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