Park Ridge-Niles School District 64 Strategic Plan

Protocol for designing, implementing and assessing proposed changes

- **Create a document that will define and align proposed change with the mission, parameters and beliefs of the District's Strategic Plan.**
  1. Define the change in detail and summarize the objectives and how it aligns to the District's parameters and beliefs.
  2. Define the measures of success for each objective.
  3. Identify the source of the change (i.e., mandated or other).
  4. Justify the necessity of the change.
  5. Explain how existing jobs, systems and processes will be impacted by the proposed change.

- **Identify the individuals and groups (stakeholders) impacted by the change.**
  1. Describe the characteristics of those stakeholders to be impacted by the change that include:
     A. List who will be impacted, their relevant experience, knowledge, needs and history.
     B. Describe how they will be impacted.
     C. Determine when they will be impacted.
     D. Tendency to support/resist given previous experience with similar changes.
     E. Workplace or important needs/values not to be compromised.
     F. Special interests/biases/predispositions to be acknowledged.
     G. Knowledge about the change(s) in question.
     H. Predominant communication and/or social style(s).
     I. Other attributes/characteristics important to acknowledge or address in order to maximize the impact of the change.
  2. Propose the best way to address individual stakeholders.

- **Select the leaders and define their roles and responsibilities for the change.**
  1. Identify the overall District-level sponsor.
  2. Select a project leader(s).
  3. Appoint school-level leaders.
  4. Establish committee(s) necessary for governance, implementation, communication, conflict resolution, etc.
  5. Document scope and responsibilities of each role.
  6. For each role above, develop performance expectations, accountabilities and how each will be measured/evaluated.

- **Establish a timeline with task lists and milestones for implementation.**
  1. Determine which project management software/ template/tool is needed.
  2. Draft a timeline that itemizes/lists:
     A. Individual tasks.
     B. Contingencies and dependencies.
     C. Timeframes for each task.
     D. Milestones and benchmark dates.
     E. Who is responsible and accountable for each task.
     F. Who is needed for advice/consultation or needs to be "in the know" for each task.
     G. How is it known whether each task is on target or at risk of not being done.
  3. Review timeline against other District initiatives and ongoing practices to stay aligned.
  4. Identify potential project constraints or risks.

- **Identify and allocate the required materials, resources and equipment to implement the change.**
  1. Specify the following required to effectively manage the change process:
     A. Human resources (e.g., people, expertise).
     B. Tools, technology, etc. (e.g., software, hardware, templates, methods, assessments, etc.).
     C. Equipment/materials (books, manuals, guides, audio-visual, toolkits, etc.).
  2. Determine the funding/budget for #1 above.
  3. Document how/when to use the above tools and equipment and how/when to produce and distribute materials.

- **Implement an ongoing system of listening and communication(s).**
  1. Develop or select a communication methodology; use existing method if District already has one in place.
  2. Partner with District's Public Information Coordinator to determine, document and/or develop the following for each significant, District-wide communication campaign:
     A. Who are key communicators? Do they have the skills/credibility required to be effective?
     B. What are the key messages? How do they need to be crafted for maximum effectiveness?

  C. Why is the message needed? What is the intended outcome of each message?
  D. When do key messages need to be delivered?
  E. How or by whom does each key message need to be communicated? Written, voice, face-to-face?
  F. To whom does each key message need to reach?
  G. Does the message require a feedback loop? If yes, when and how will the interaction process work?
  3. Document lessons learned, successes and opportunities for improvement after each communication campaign.
  Communicate with the District's Public Information Coordinator the progress to be included in the District's annual reporting to the community at large on the progress of the overall Strategic Plan (e.g., Connections newsletter, "State of the District," etc.)

- **Identify and select a training approach.**
  1. Consult with the appropriate department to determine the following:
     A. Who to train.
     B. What to train them on.
     C. Why this training.
     D. How to train.
     E. When to train.
     F. Where to train.
     G. How to differentiate training.
  2. Evaluate training effectiveness and redesign training as necessary.

- **Develop an ongoing system of evaluation before implementation begins.**
  1. Monitor the timelines, task lists and milestones for implementation.
  2. Using the measures of success in Step 1, determine if the objectives were achieved and if additional measurements are needed in the future.
  3. Implement an annual or other periodic review process to make sure the change is successful and if not, propose plans for improvement or cancellation.
  4. Report on lessons learned (what went right, what went wrong, what would you do differently).