You're listening to You've Got This, episode 366.

Welcome to You've Got This, a weekly podcast for higher education professionals looking to increase their confidence and capacity for juggling the day-to-day demands of an academic life.

I'm your host, Dr.

Katie Linder.

On this episode, I'm answering a listener question that was emailed to me.

Now this person said, "I know that planning is one of your superpowers, and I'm curious if you have advice or strategies for planning with a team of people.

Specifically, I'm helping to design a strategic planning retreat for the leadership in our unit, and I also need to meet with a team of people I'm supervising to plan out the next year.

I'm fairly good at planning for myself, but I'm not used to planning with larger teams of people.

I have some ideas for using coaching questions to get the conversation started, but I'm not sure how to move from that to a shared vision and then action items.

Our group often has really rich and interesting conversations, but without always resulting in a plan.

This is such a great question.

So I'm so glad that this person emailed me and also just a reminder to all of you.

If you've got a question you want me to tackle on the podcast, you can always email me at hello@drkatylinder.

com.

And I love to incorporate your questions into the show.

So, um, this listener is asking about a couple different things.

One is strategic planning with a team and also regular planning for a year of activities with a team.

And I'm going to offer a series of steps that I think can apply to both situations, but I'm going to offer a few different caveats depending on the situation that you might find yourself in.

So the first question that I think is important to start with, whether it's strategic planning or just planning out the year, is do you have a solid mission and vision in which to ground your planning?

Now, this might be something that you have in your unit itself.

It might also be something that you have at the larger organizational level.

And then the next question is, do you have a sense of the organizational or unit values that will help to guide or drive the work of strategic goals?

Because when you're starting to think about planning, you want to make sure that you're going in the right direction before you get into all the weeds of like actually doing all the things.

So gathering all of those materials about mission, vision, values to have alongside planning can be really helpful as you start to go into these conversations.

Now, I think the other helpful thing when it comes to planning, and this is really for like looking at like a year's worth of activities or services or things like that, is to put anything on the table that's already a given.

So for example, if there are regular activities or services that your office provides throughout the year, you would note that first.

And you would also put in any other kinds of calendared projects like writing up an annual report, if that's something you have to do on a regular basis.

And doing this as a first step can help you to know how much margin that you might have to take on any extra special projects or initiatives.

So kind of getting everyone aligned first around the bigger picture of what you're trying to do or accomplish, and then the regularities that you're going to have to build in and work around as you're doing your planning.

Now, as you're putting those kind of givens on the table, these things that are already a given for your unit or your area, I think this is also a great place to discuss what is or what is not working.

Because just because you did something in the past or you had a plan to do it moving forward doesn't necessarily mean that it's working in the way that you wanted it to.

So this is a great part of the discussion to think about, you know, what are things that you might want to stop doing or pause doing, including the things you want to start doing as well.

So we want to make sure we're not just having an additive approach, that we're always adding more to what we we have on our plates, but are there things we want to take off of our plates as well?

Now the next thing that I think can be helpful to do if you're leading some kind of strategic planning effort or planning effort with a team is to use a tool like a SWOT analysis or a SOAR analysis to organize the group's thinking.

So SWOT you may be more familiar with.

It stands for strengths, weaknesses, opportunities, and threats.

I actually prefer SOAR, S-O-A-R, which stands for strengths, opportunities, aspirations, and results.

And using categories like these to lead some kind of brainstorming session with a team can be really helpful.

And I think that when you do something like with a tool like this, you can do small groups where people are kind of discussing these together and then coming back and doing like a broader share out with the group.

Or if depending on the size of the group, you could have to just be like a large group conversation that you're, you're walking everybody through at the same time.

Once you've had a chance to complete a tool like that, which gives kind of an overall assessment of what you think are possibilities for what you might want to do.

I think it's also helpful to have just a brainstorming session or just larger discussion that's a little bit open-ended as to like what do we think about these results?

What does this mean to us when we look at the analysis of the sore or the swat and what are the kinds of things that we think could result from this information in terms of decision making as we move forward.

Now it's also really useful I I think, to allow individuals to connect their personal work to the work of the team.

So if you've done an activity of brainstorming around a tool like a SWOT or a SOAR, then you can give people a chance to actually think about how they are connecting their individual projects or their individual work in bigger ways to the larger unit or organization.

So this might be like a think, pair, share activity where they see where their projects or their kind of individual work aligns or overlaps with the overall group and the direction of where you might be taking your work.

So this is just a piece that I think is really important if you have the time to allow people to make those connections.

Now that step of aligning individuals to the larger group and what you're trying to do can also lead into a next step, which is where you're starting to do a bit of a gap analysis of what's been brainstormed and what the group actually has the capacity to do.

Now this is the step that I feel like we skip or we ignore.

And we just go straight into like, Hey, we're going to do all the things.

But at this stage, I think it's really helpful to look at a timeline or a calendar to assign different projects to people and to like quarters of the year.

It's a kind of workload analysis or project work plan that can help you to know who's going to be doing what, when, what fits into the workload of your timing and what might have to wait.

Now, one of the things that I think is really helpful for this kind of planning when you're starting to kind of like put things down on paper and document what you're doing, um, is it starts to hold people accountable to like, Oh, I'm actually going to have to do this thing.

So this listener had described, you know, like we talk about this, but we don't actually do things or we're having a hard time with the implementation stage.

So when you're getting down into like the action step stage, writing these things down and assigning them to people is going to start this process of having people maybe push back a little bit and say, like, I don't know that I have the time to do this.

Okay, then once you have a sense of what you want to move forward with as a team, you can also schedule things like quarterly touch points to see what has made progress.

Or if you have just regular meetings with this team, you can have a dedicated agenda item at whatever that regular meeting schedule is to check on progress for those particular projects or initiatives.

Now, I want to layer in a couple of additional things here around strategic planning because I couldn't tell this from the listener question, But sometimes strategic planning is implemented over a much longer period of time.

So a lot of what I just described can be applied to that, but I'm going to offer a couple of caveats here.

So if you're building out like a five year plan that you're going to have to execute over a much longer timeframe, it can involve more and different stakeholders and community members.

So for example, you might do a needs analysis to ensure that you're focusing on addressing the right kinds of needs and concerns within your community.

rather than just having your own internal team plan what you think is needed.

Now you might have other data that you're bringing into that discussion, but you might just want to think about who are the stakeholders that you need to take into account if you're doing like really lengthy planning or strategic work.

The other thing is that brainstorming for a multi-year plan can look really different than an annual plan, because obviously you can accomplish more in multiple years than in one year alone.

Now that may feel like just common sense, But it can be hard to know how big to go with your brainstorming because you still need to break projects down into small increments to execute them.

So one option that I like to offer is that instead of starting with really big goals, you can start with the first year of goals or projects, and then think about how to build off of those towards something bigger or more complex.

So for example, if you want to start by offering one workshop or training on a particular topic, you might eventually build off of that into a series of things that can be turned into a micro credential for people to earn once they have completed this like internal training.

So there's ways to kind of start small and go big instead of go big and then break down into small.

And if you find that you're having a hard time with implementation, you might consider starting small and going the opposite direction because I think that that can be helpful for people.

Now I am sure there is a ton more that I could say about planning with a team, but I feel like these are just some good principles or starting points that you can kind of be thinking about as you're diving in.

And I would also say there are some really helpful resources out there about kind of like facilitating meetings, facilitating retreats, um, that are available online.

There's books.

I'll try to link to a couple of these in the show notes that I think are also helpful if you're not sure about like activities that you want to be doing with people during, you know, an extended retreat where you're doing some planning.

But one way to think about it is to break it down just like you would a course.

What are the objectives that you're trying to meet?

What are the activities that you would use to meet those objectives?

And then how are you going to assess that those objectives have been met?

And this is another way to think about breaking down a longer retreat.

So if I was going to do this for like a half day or even a day, I might break this down by like every hour or every 90 minutes or every quarter.

Like if it's a full day, I might have like four 90 minute sections of like, what am I trying to achieve or accomplish within that period of time?

What are the objectives for that period of time?

And then how do I know that they've been met?

Like that would help me to chunk the time in a way that would feel a little bit more manageable Versus just like looking at an entire day and not being sure how I'm gonna kind of get us, you know through to the end So if there are other questions that I can answer around this topic or around other topics that you want to hear me address You can always email me at hello at dr.

Katie Linder calm.

I always love to hear from you.

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