

## SCOPE OF WORK

The Clarion Group will complete the following scope of work to assist Washington College in its strategic visioning process.

### **Phase 1: Preparing for the Process**

The Clarion Group will help Washington College prepare for its strategic visioning process by:

- Reviewing all appropriate background information on the College
- Advising leadership on all aspects of preparing for the strategic visioning process, including:
  - Determining who the strategic planning group will be
  - Developing the agendas for the strategy sessions
  - Providing participants with “pre-work” to prepare for the sessions
  - Working with appropriate leadership and staff on all aspects of preparing for the strategic visioning process, including the timeline for the project and the required logistical arrangements

### **Phase 2: Securing Stakeholder Input**

The Clarion Group will facilitate a process to secure input from key stakeholders on the current situation and future direction of Washington College. This process will include:

- Virtual focus groups with, for example, Washington College students, faculty, and staff
- Individual telephone interviews with stakeholders such as the Board of Visitors and Governors' Executive Officers, administrative leaders, and key partners

The insights secured via these methods, in combination with your brand survey data, will both inform the strategic visioning process and provide opportunities for transparency and engagement of the College's faculty and staff.

In completing Phase 2, The Clarion Group will complete the following steps.

- Work with leadership to determine which stakeholders to include in the process.
- Develop a protocol to use in conducting the focus groups and interviews.
- Conduct the focus groups and interviews.
- Analyze the results.
- Prepare a written executive summary of the results, to be used by the strategic planning group as input to the strategic visioning process.

### **Phase 3: Facilitating Visioning Sessions**

The Clarion Group will facilitate two visioning sessions over the course of a day on campus to consider a vision for Washington College ten years from now, when the College will celebrate its 250<sup>th</sup> anniversary. The first session will include Washington College faculty and staff, with an estimated ½-day duration (ideally in the morning). This session will also allow faculty and staff to “meet and greet” with me and ask any questions they may have about the overall strategic visioning process. The second session will include the strategic planning group, to be convened for an estimated two hours. At each session, participants will:

- Reflect on their aspirations for the College in ten years.
- Identify the key elements of a 10-year vision statement for the College.

I will compile and analyze the data secured over the course of this day and summarize it in a written document you can share with all faculty and staff. This document will be another input to the strategic planning session.

### **Phase 4: Facilitating the Strategic Planning Session**

The Clarion Group will facilitate a two-day strategic planning session at which the planning group will:

- Assess the current situation of Washington College, including identifying:
  - Its strengths
  - Its weaknesses/areas of needed improvement
  - The critical issues it will face over the next three to five years
- Consider the output from the visioning sessions and confirm key elements of vision for Washington College ten years from now.
- Set the College's five-year strategy, within the context of its current mission and informed by the key elements of its future vision, including:
  - Identifying the central challenge that it faces over the next five years
  - Defining the few critical strategic priorities necessary to meet that challenge
- Develop a strategic map – a one-page visual display of the strategy – that defines the strategic objectives that must be achieved to accomplish each strategic priority.
- Prepare Washington College to move to implementation of its strategy by:
  - Prioritizing the strategic objectives to be carried out during the first year of implementation
  - Identifying the few “tracks of work” that will be carried out during the first year
  - Determining specific next steps leading into the implementation planning workshop.

The Clarion Group will document the strategic planning session with an in-depth written summary.

### **Phase 5: Facilitating an Implementation Planning Workshop**

The Clarion Group will help Washington College begin to implement its strategic map by completing the following scope of work.

- Prepare for the implementation planning workshop by working with College leadership to:

- Confirm the implementation priorities/tracks of work for the first year of strategy implementation.
- Determine the best way to organize for the successful implementation of those priorities/tracks of work.
- Identify the “leads/champions” that will lead implementation of each priority/track of work and the teams that will support them.
- Prepare for all aspects of the implementation planning workshop.
- Conduct a two-day implementation planning workshop – delivered virtually or in person, depending on your preference – that includes:
  - A one-hour orientation to implementation planning for College leadership and the leads/implementation teams responsible for implementing each track of work
  - Individual, 90-minute implementation planning sessions (up to a maximum of five sessions) with each lead/implementation team responsible for implementing a track of work. At each session, the team will begin to develop the implementation plan for its assigned track of work, including:
    - Identifying the few critical results/outcomes for its track of work
    - Beginning to identify tactical steps, deadlines, and accountabilities for each result
    - Identifying next steps required to complete the implementation plan
    - Receiving guidance and coaching on how to optimize the management of implementation