

SDS Goal Setting Workshop #3
September 25th, 8:00AM-2:00PM
Facilitator: Patti Dobrowolski
Attendees: SDS Managers and Directors

Workshop Goals:

To continue to build discipline with our strategic planning process

To better align ourselves with our culture of service

To continue to build a strong team

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Agenda:

Purpose and outcomes

Introductions; person map

Current map review

Break

Action plan priority areas

-last year

-this year

World café discussion

Smart goals

Action planning

-Goal setting

Lunch

Action planning

-id milestones

-actions

-champions

Debrief

Personal accountability

Close

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The more we keep the map in the front of our minds and look at, the stronger and easier our smart goals will be to accomplish

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8 Meta Skills

ACTIVITY: if you have done your meta skill, find someone who has not had the experience, share with them what you did in the four weeks that you were focusing on your meta skill. What is the core strength you have been working on this year; what is the one thing you have been great at this year.

Observations:

Linda: Flexibility/Openness: I had lots of staff that were on vacation and leave. Opened up to Scott about an idea.

Alan: Inquiry/awareness: People weren't aware of opportunities, for example: I organized java training and it was successful.

Anne: Partnership/Collaboration: Involved in the merging of two workgroups, and thought about how we can merge these two successfully to meet customer needs in a new and better way.

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Marcus Buckingham: find your 32 strengths and have a strength finding profile; a program that tells you how to manage someone with specific strengths.

Any kind of thing you can do to get your understanding up about what you want to do

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Scott hopes that this presentation of the Meta Skills presents it in a way that makes it easier to discuss with your staff; bring it to life; builds an energy and if you can take that and work with your teams on a regular basis so they can bring it with them; in the beginning we'll have to be deliberate but eventually we'll do it without thinking.

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ACTIVITY: Introduce yourself and say the strength you will leverage for the map.

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Current Map Review

Left side of the map is the current state of the team: no easy button, lack of comm., internal focus, lack of pricing, success by fire drill, increased transparency

Right side of the map is the desired new reality: clarity and confidence, increased customer satisfaction, clear roles and responsibilities, clear expectations

ACTIVITY: What from last year's map has been successfully accomplished/what is missing? What should be part of the new reality?

Additions: Culture of Service (utilize Meta Skills), Transparency (sharing information, free information exchange, transparency over the way decisions are made), Service Improvement Metrics

Strategic planning is too complex, put it into common denominator by setting it up on the spread sheet like map.

Need to check up on the map every quarter so that we can keep track of our goals.

People have looked at the map in individual groups or on their own, but it is important to look at it as a team; keep track of it as a team.

Are the vision elements for this year different in any way?

ACTIVITY: Get into groups of four; are these the right vision elements? Is there something else that should be there or are those the one that should remain?

Respecting our customer's contributions and expertise

Accountability

Culture of Service

“People don't care how much you know until they know how much you care.”

UW Vision of Discovery

-We need to discover how we can help the university in their vision of discovery.

Partnership and Collaboration

Am I aligning to that vision of what we want to be?

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How we came up with the Priority Areas:

Directors met in August to come up with Priority Areas. We decided that we should keep our last priority areas but that we need to focus on new ones.

Culture of service is one of the drivers;

Service side: outreach, partnership and collaboration

People side: provide training, skills to do our job

Listed all the priority areas on cards and did card sorting exercise

Financial management carries over from last year

Business Continuity: all business units need to be more mindful of what business continuity plans are; how we can deliver service in a disaster and how we can deliver them on campus. Need to know what services continue all the time and strategize on the services that we have. We need to have a flow so that we don't divide up into different sections. Reliable and Responsive systems continue here. To do those things in support of our services so the business of the university continues. Engineering with business continuity in mind; raising the awareness with customers, having conversations and coming up with options and what ifs in order to come up with solutions now so that when it happens there aren't as many problems. Part of it is what we would do in the event of a disaster.

Service Focused: Questions: Does that cover service line management? Answer: That is a part of it but it is not directly on it; putting our customers hat on part of the time and looking at our service through their point of view and what their needs are. Take the information and go inside the organization; throw the answer back at the customer rather than meeting their needs the way they see it. Step back and put the customer hat on: are the things that we doing right now; are we really going through these steps for the customer or are we going through it for our organization.

Fiscal Responsibility: under financial management, more accountability to managers and directors when it comes to budgeting. In order to provide accountability; part of that is having the information; push the decision making down to at least director level and hopefully to manager. There is an interim that exists from old EC processes, just don't have systems in place yet. While we will be very supporting to C&C wide effort we will not necessarily wait for that because there are things SDS can do now to make the transition better. Question: Will we see more things like a budget for our work unites? Answer: Yes, first the directors will get budgets then go from there.

If you're connected with the customer part of that process is to keep checking in to make sure you are meeting their needs. Shift the conversation to taking those specific things and tying them back to being service oriented. Project management.

Organizational Culture: focusing on the people part of the organization. Managing where we are today to our future state. Our staff needs to be successful on our new vision. Creating experiences for people so they can start relating at their own pace and in their own way so they can be more effective than they are today. Share best practices and modeling opportunities. Help each other move forward as an organization.

Message to our staff; as you think about what we will focus on in the coming year, the blue bold focuses on what we want to be our reality and our customer's reality.

Dialog about what is changing in shift to the culture of service

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ACTIVITY: World café; dialog format that helps us rotate through and build on each others ideas; get into five groups of six people and sit together in a circle of chairs to provide for easy dialog, be fully engaged and participating. In group designate a facilitator and one person to scribe: facilitator makes sure that everybody has a chance to talk. Scribe will capture everything that is discussed; only capture the key concepts, simply scribes for the conversation. The facilitator will remain and debrief to the next group what happens.

(3) What will need to change in how we work together when we move into the UW Tower?

- openness and supportive to change
- more creative
- interface with the customer
- empathy
- flexible
- be respectful
- ways we communicate

(2) In what ways will our goals need to be different this year?

- tangible and real (SMART)
- goals incorporated into daily work
- augment customers and UW visions
- emphasis on customer direction
- accountability
- better communication
- understanding at all levels
- engagement

(1) What can our customers expect of us in this new culture of service?

- flexibility
- understanding
- collaboration
- accountability
- follow thru
- partnership
- listening/communication
- timely response

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SMART Goals:

SMART is a goal to figure out how you are going to get where you want to be.

Specific
Measurable
Attainable
Realistic
Tangible

Turning a general goal into more actionable steps.

Without a clear destination you're all dressed up with no where to go

“Drive thy business or it will drive thee” – Benjamin Franklin

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Priority Areas:

Fiscal Responsibility

Business Continuity

Service Focused

Organizational Culture

On the map from last year there are end goals. Did we achieve the goals from last year's swim lanes and are their goals that we want to carry over into our new lanes.

ACTIVITY: What SMART goals would we like to carry over into 2008 for each priority area?

SERVICE FOCUSED:

- (1) All SDS service are defined for internal and external use by 4/08
- (2) Web page that lists and describes all SDS services and links to info about each service is developed by 8/08
- (3) Staff training for SDS service delivery as been identified by 4/08
 - a. Service delivery: how do we go about delivering a service?

FINANCIAL RESPONSIBILITY:

- (1) SDS financial processes roles and responsibilities defined by January 2008
- (2) SDS financial processes and policies implemented by June 2009
 - a. Put into first one to make plan

BUSINESS CONTINUITY

- (1) Inclusive BC Action Team formed by 12/31/07 (involving SDS staff/C&C/OIM/Staff selected by Directors)
- (2) BCAT has identified a “Top 5” of critical services by 3/31/08
- (3) Pilot project aligned to BC produces completed by 6/30/08

ORGANIZATIONAL CULTURE

- (1) Culture of service is defined, published, and communicated across all of SDS by 4/1/08
- (2) Incorporate the published definition of COS into HR processes including job description, performance evaluation, rewards and recognition program by 6/1/09
- (3) Develop and publish a communication strategy to provide the COS throughout SDS by 4/2/08

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Action Planning:

ACTIVITY: Plan and build out what steps per quarter will lead to your end SMART goal. Choose one milestone per quarter per goal. Whoever is champion of each lane should be identified. A champion is someone who will keep track of progress throughout the quarter/year.

Quarter One: July-September

Quarter Two: October-December

Quarter Three: January-March

Quarter Four: April-June

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ACTIVITY: Think about how will you contribute to the success of the SMART Goals

- spread the word
- clarity

- participate
- focus
- commit
- involvement
- participate
- communicate
- thoughtful
- emphasize training
- follow through
- enthusiasm
- share
- participate
- commitment
- involve staff
- ideas
- optimism
- organize
- engaged
- innovate
- communicate
- support
- collaborate
- collaborate
- define our services
- attend
- spread the word
- clarity
- participate