

## Planning the Vetting Process

---

**Purpose:** This resource supports task force leaders to plan an effective process to vet recommendations before final publication. Formal vetting of recommendations serves to:

- Address unforeseen issues or concerns before final publication;
- Build support and buy-in from stakeholder groups;
- Serve as an additional means of communicating the data, urgency, and plans for change; and
- Increase legitimacy and transparency of the mathematics task force process.

**Users:** Facilitator and co-chairs (“executive committee”)

**Instructions:** Review this resource for guidance and suggestions when planning for an effective vetting process. The content is divided into the following sections:

- General Recommendations
- Selection of Participants
- Preparation
- Suggested Agenda
- After the Event

### General Recommendations

In general, we recommend an in-person process for fully engaging stakeholders for the following reasons:

- Participants tend to engage more in-person and can share and build upon one another’s ideas.
- Faculty members of the task force can be actively involved in the presentation of the recommendations, which reinforces the understanding that this is a faculty-driven process.
- Faculty presentations of the recommendations can help faculty develop a sense of ownership and prepare them to be advocates and champions of the work.
- An in-person event heightens the sense of authority and importance of the work outside of the task force membership.

The in-person process can be done through a central event with representatives of stakeholder groups to give input or through multiple regional events with local representatives.

In cases in which in-person events are not possible, we encourage task force members to consider how they might structure other processes to create opportunities to achieve the outcomes listed above.

### Selection of Participants

The success of any vetting process is highly dependent on selecting the right participants. The following table lists stakeholder groups that you might want to involve in the vetting process.

Stakeholder Groups	Reasons for Involvement	Things to Consider
2- and 4-year deans, chief academic officers, or presidents	Enacting the recommendations at the institutional level will likely require the support of administration in terms of resource allocation, inter- and intra-institutional policy changes. Administrators have to plan ahead and like to be informed early about changes they can expect. For example, task force recommendations may require a change in student policy or procedures.	Are there organizations or associations that represent administrators and presidents in your state? These groups can be allies in helping communicate the report to their members and build understanding over time.
Policy agencies and/or policy makers (higher education and K-12)	If your recommendations include policy changes, you want people who will be part of that process to be engaged and informed. These people may include board members of individual institutions or state board members. Engaging and informing these stakeholders can also help build support for resources to support the enactment of the recommendations. Finally, if there are concerns about pre-emptive legislative action in this area, it can be helpful to demonstrate that the math task force is setting out a strong agenda to improve student success.	Are there policy makers or individuals in agencies who have been champions of higher education and/or who work on the transition from K-12 to higher education? Inviting them to participate honors that role and increases the likelihood that they will support this work. It can also be effective to engage people who are seen as not supportive of higher education. Being involved in the vetting process can give them an opportunity to see educators actively addressing key concerns.
Math education leaders not on the task force	There may be influential leaders who can help promote and advocate for this work.	Are there organizations or associations that can help communicate to math faculty? Are there any institutions or regions that were not well represented on the task force?

Stakeholder Groups	Reasons for Involvement	Things to Consider
Student affairs leaders, including directors of advising	Implementing math pathways inevitably will impact advising. These stakeholders can provide input on the feasibility of recommendations and how to coordinate with advisors and other student support staff.	Are there organizations or associations that represent advisors in your state? These groups can be allies in helping communicate the report and build understanding over time.
Faculty leaders from partner disciplines or on general education councils or similar groups	The recommendations may impact and/or depend upon general education programs or specific programs of study. Implementation may require the support of faculty in partner disciplines or in leadership roles regarding general education requirements.	Does the state have a faculty senate or general education council that should be informed of the recommendations? Are the recommendations going to require general education requirements at any highly influential institutions such as the flagship? Are there any programs of study that are particularly impacted by the recommendations?
Institutional research staff or directors (local or state-level)	If the recommendations address evaluation and tracking of implementation, the input of people who know the state and institutional data systems may be helpful.	Are there organizations or associations that represent advisors in your state? They can be allies in helping communicate the report and build understanding over time.
Other stakeholders who will be impacted by the recommendations		

### Preparation

The event should have a sense of occasion and importance, and we suggest that presenters prepare in advance.

- Practice beforehand. In some situations, task force members have met for a few hours before the participants arrive. Another option is for task force members to practice their presentations with one another remotely.
- Summarize important data in easy-to-read graphics or tables in PowerPoint slides or handouts.
- Consider what information participants should have prior to the event. Participants should be clear about the purpose of the meeting and their role. Keep in mind that

most busy people will not read more than one or two pages of information prior to a meeting.

- Plan for how input will be gathered at the event and how discussions will be documented. Some task forces have to have an external person record and summarize the results as a part of reporting the recommendations.

Other things to consider in planning:

- Do you want to video tape the presentations or take photos? If yes, get photo releases from presenters and participants.
- Who should the invitation come from? Do you need to make any personal contacts or follow-up to encourage people to attend?
- Do you need to provide food and beverages?

### Suggested Agenda

- **Welcome and introduction** from a high-ranking official or acknowledged leader. If the charge for the task force came from an official, that person (or his/her representative) should open the meeting.
- **Setting the context or “Why a mathematics task force?”** presented by a task force member or other leader. This section should be brief and high-level.
- **Background on the task force** presented by task force members. The purpose is to demonstrate the deliberation and thought that have gone into this process and highlight the big shifts in understanding. One way to approach this portion of the event is to ask the task force members to identify one or two key discussions or ideas that were the most meaningful to them. This section should describe the big picture—not every step—of the process.
- **Recommendations** presented by task force members. Be sure to include evidence for the recommendations.
- **Gather input** from the participants. Break into small groups for discussion. Task force leaders may want to create groups based on participants’ roles so that each group can focus on the recommendations that are most pertinent to them.
- **Summarize next steps.**
- **Debrief with the task force members** after the public event for 45–60 minutes; this time allows the task force to celebrate and discuss the input from the different groups.

### After the Event

Consider the following:

- Did input from stakeholder groups indicate a need to revise or add to the recommendations? If so, how will this process be managed?
- Will there be any follow-up with participants to thank them, inform them of how the input was used, or notify them of next steps?