### Developing a State Action Plan Toolkit

### Overview



### **Purpose**

- To assist chairs and facilitators to plan for creating a state action plan for enacting the task force recommendations.
- To address critical issues such as:
  - o Creating a plan to enact each recommendation.
  - Creating a communications and engagement plan that engages people and institutions across the state, and builds support and a sense of urgency for the recommendations.
  - Defining the ongoing role of the Mathematics Pathways to Completion math task force for phase two.

### Overview

A state action plan is the blueprint for enacting the recommendations. It includes a timeline, milestones, and key activities. The action plan may also identify resources needed to enact the plan. The math task force must transition from developing state-level recommendations to planning for enactment at the local level.

The Dana Center recommends establishing small working groups of 3 to 5 people to draft different components of the state action plan. In some cases, enactment of a recommendation might be very straightforward while in others, enactment might take careful strategic planning.

Consider the following examples.

**Situation 1**: A task force has recommended that a statewide transfer agreement be amended. There is a clearly defined process to follow that should be able to be accomplished in a relatively short time.

**Situation 2**: A task force has recommended that all colleges in the state offer at least two mathematics pathways (algebraic intensive and non-algebraic intensive) for students at the developmental and gateway levels. There is a need to create a plan for how this work can be supported throughout the state on a 3-year timeline.

In Situation 1, a working group might actually enact the recommendation. In Situation 2, the working group would create a plan for the enactment over time. In this case, the working group might continue to oversee this work over time.

The structure of using working groups versus the full task force has several advantages:

- Small groups are better suited to detailed work and can often accomplish tasks more quickly.
- The working groups can include representatives of special interest groups that are impacted by a particular recommendation.



- Breaking the State Action Plan into small components provides an opportunity to broaden engagement and include more people in the process.
- Working groups allow task force members to make decisions about their own commitment at this transition point. Some members may not have time to devote to this deep-level work. However, these members have the option to continue being on the task force but not commit to being on a working group.

### Components of the Toolkit

Each component is available as a separate file for use as handouts. Templates are available as Word and/or Excel files so they can be modified.

- 1. *Transitioning to Action Planning*, pages 3-5 Overview of how a task force can transition from making recommendations to creating a state action plan.
- 2. *Establishing A Working Group*, pages 6-7 Suggestions for developing a charge for the working group and selecting members
- 3. *Preparing Working Group Members*, page 8 Suggestions for preparing members before the working group convenes
- 4. Effective Practices for Communication and Engagement, pages 9-10 Resource to assist working groups to define communication and engagement practices related to their charge and deliverable.
  - Appendix A Communication and Engagement Plan Template (Word file), pages 11-12
  - Appendix B Sample Communication and Engagement Plan (Word file), pages 13-15
- 5. State Action Plan Template (Excel file), page 16
  Suggested template for working groups to document their plans to enact task force recommendations
  - **Appendix C** Sample State Action Plan (Excel file), page 17

### Transitioning to Action Planning

### **Developing a State Action Plan Toolkit**



**Purpose:** This tool is designed to plan the discussion that will assist the task force to transition into working on a state action plan based on the state-level recommendations.

**Users:** State facilitator and chairs

**Suggestions for Use:** The graphic and table below outline key issues that should be considered in the transition from making recommendations to creating the state action plan. It can be useful to have your consultant facilitate the actual discussion. In this case, the consultant should work closely with the task force chair and facilitator to plan the discussion.

While there may not be time to have a full discussion on each item, we recommend that the task force make high-level decisions for each item and then establish clear responsibilities for next steps. It may be helpful to split into small working groups for some discussion, which can be an effective way to define the charge and membership of the working groups.

Additional resources to support the work are identified in blue italics. These resources are included in this document and are also available on the Dana Center website as individual files.

### Some things to think about ...

### **Preparing for the Discussion**

The discussion will be most effective if some draft ideas for the task force are prepared in advance. For example, instead of asking the task force members to define topics the working groups, the chair and state facilitator should present a proposal for working groups on certain topics. The task force members can then revise the proposal if needed. This approach jump-starts the conversation and allows more time to be focused on issues in which discussion will be most valuable.

### What Resources Are Available?

Chairs of working groups should know what resources will be available to support travel and meeting costs. It will be helpful if the chairs and state facilitator have this information in advance of the task force meeting.



### **Transitioning to Action Planning Guide**

**Goal:** Develop a state action plan with the timeline, milestones, and key activities that will lead to the enactment of the math task force recommendations.

### **Math Task Force Creates Recommendations**



Working Gro	oup Activity	Task Force Activity
Establish Working Groups to Enact Task Force Recommendations	Establish Working Group for Communication and Engagement Plan (CEP)	Define New Task Force Role
<b>Step 1:</b> Task force establishes working groups to plan and enact recommendations.	Step 1: Task force establishes a working group that plans external communications about math pathways among and within state-level stakeholder groups.	<b>Step 1:</b> Task force creates plan for ongoing role and oversight.
<b>Step 2:</b> Working group chairs recruit and prepare members.	<b>Step 2:</b> Working group chairs recruit and prepare members.	Step 2: Task force reviews working groups' state action plans and progress on communications and engagement plan.
<b>Step 3:</b> Working groups prepare and submit state action plan and written summary to task force.	<b>Step 3:</b> Align state recommendation working group's communication and engagement suggestions to a central CEP.	
	<b>Step 4:</b> Information about state-level recommendations and ongoing work for state action plan is disseminated.	

Once draft action and communication and engagement plans are received from each working group, the task force will complete the following activities:

Draft State Action Plan.

Review and Vet the Plan for Feedback.

**Finalize State Action Plan for Enacting Recommendations.** 

The following table builds on the Transitioning to Action Planning Guide to identify key issues that should be decided by the Task Force in the transition to the next phase.

Working Gro	up Activity	Task Force Activity
Establish Working Groups to Enact Task Force Recommendations	Establish Working Group for Communications and Engagement Plan (CEP)	Define New Task Force Role
Leadership: Appoint a chair or cochairs. Consider if chairs should be members of the task force.  Number: It may be appropriate to assign a working group to each recommendation or to some recommendations if they may be combined into one group.  Membership: Consider what stakeholder groups should be represented.  Connections: Make connections with other state-level initiatives and task force recommendations, especially when selecting/deciding working group members.  Charge and deliverables: Define a clear and specific charge for each group and identify deliverables.  Timeline: Set deadlines for deliverables.  Resource: Establishing a Working Group	Dissemination of recommendations: Plan for dissemination of the task force recommendations or report. Consider different audiences, events, and media (e.g., online, print) through which information can be disseminated. Consider creating opportunities for discussion among stakeholder groups.  Ongoing communication: Create a plan for communicating updates about the work. Consider if individual working groups should be responsible for communications or if all communications should go through the Task Force Steering Committee.	Role: Agree on the ongoing role of the task force, especially how much oversight the task force should exercise over the working groups. It might be appropriate to establish a small steering committee for the task force's ongoing work.  Logistics: Plan for how the task force will continue to operate through meetings, email, phone calls, etc.  Internal communications: Plan for how work across working groups will be communicated and coordinated. Pay particular attention to areas in which different working groups will impact one another.
	NEXT STEPS	
After the working group chair recruits members and decides on structures and processes to meet the charge, the chair will prepare new members for the work.  Resources: Preparing Working Group Members; State Action Plan Template (Excel) with Sample Plan	Working group implements the communication and engagement plan. This may also include gathering feedback from stakeholders.  Resources: Effective Practices for Communication and Engagement; Communication and Engagement Plan Template	State facilitator and chairs set up future meetings, phone calls, or email communications.  Task force reviews working group deliverables and compiles the draft-to-finalized state action plan.  Ongoing external communications are disseminated to the field, and feedback is funneled back in.

### **Establishing a Working Group**

### **Developing a State Action Plan Toolkit**



**Purpose:** This tool can be used to prompt ideas about how to effectively establish working groups and define its responsibilities to enact task force recommendations.

**Users:** Math task force and/or working group chairs

### **Selecting Members**

There are several things to consider in establishing the working group membership:

- Who is the chair for the working group?
- What is the right size for the group?
  - Generally, effective working groups are 3 to 5 people. Too many people make
    it difficult to coordinate schedules and do detailed work; too few can limit
    perspectives and capacity, and can decrease legitimacy.
- Are there people outside of the task force whose interests best serve the charge of the working group, and should be recruited?
- What stakeholder groups should be represented?
  - Are there individuals who are recognized leaders or experts in this area? Is any special technical expertise needed?
  - Are there individuals with connections to other state initiatives (e.g., corequisite) who should be represented in this group?
- Consider if there are people or groups that should be consulted or informed but do not necessarily need to serve on the working group.

### Define the Working Group Charge, Timeline, and Deliverables

Setting a clear charge is the most important activity that a task force can do to support an effective working group. A charge should be clear and realistic. It is a good practice to have one or two people draft the charge and then vet it with others to see if everyone has a common understanding. The language of the charge and its recommendation should mirror the Task Force Recommendations report to enhance consistency between the report and the working group's activities. Additionally, deadlines (e.g., completion of working group activities, submission of deliverables to the task force) should be clearly defined.



### Sample Charge

The Math Pathways Working Group will create a plan for implementing Task Force Recommendation 2 that every college offer at least two math pathways based on existing courses in the state transfer module (statistics, math for liberal arts, or college algebra).

See the full task force report for details.

The Math Pathways Working Group will focus on work with math departments to develop courses and define alignment. The group will collaborate with the Advising Working Group and the Communication and Engagement Working Group.

The plan will include:

- A plan for enacting the recommendation at all colleges over the next three years (e.g., goals for number of colleges each year, proposal about how to identify early adopters, etc.). The activities for the first year should be well defined.
- Request for support: Identify what resources or services will be needed to support this work.
- A timeline and plans for future follow-up (e.g., the written plan is due to the task force on February 1, 2017 and a working group member will present the plan at the task force meeting in late-February).

### **Preparing Working Group Members**

### **Developing a State Action Plan Toolkit**



**Purpose:** This resource can help working group chairs prepare members of the working group, especially those who have not been previously involved in the math task force work, to be informed and work efficiently.

**Users:** Working group chairs

### Recruitment

When inviting someone to serve on a working group, it is helpful to provide the following information:

- Brief background on the task force
- Copy of the Task Force Recommendations report
- Charge of the working group
- Estimate of time commitment
- Logistics of meetings and likely work assignments.

### **Preparation**

Providing members with structure and resources can save time and help the group work effectively and efficiently. Here are suggested activities:

- Ask all members to read the math task force recommendations and any other pertinent artifacts from the task force.
- Ask members to read other documents directly related to the working group charge (do not overload members with too much information). Ask task force chairs and facilitator for any resources, such as data slides and reports provided by the Dana Center, on specific topics as needed.
- Prior to the first in-person meeting, schedule a conference call or webinar to review background information and ensure that all members clearly understand the charge and time commitment.
- Provide agendas and outcomes for each meeting.



### Effective Practices for Communication and Engagement



**Developing a State Action Plan Toolkit** 

**Purpose:** This resource can assist working groups to define effective communication and engagement practices related to their charge and deliverables.

**Users:** Working groups

Effective communication practices build awareness of math pathways within and across institutions. Engagement strategies enable people to process and act upon their awareness of information to build ownership. Both communication and engagement are essential practices that require planning and subsequent action among different stakeholder groups.

Working groups should examine the following practices and incorporate them into their action plan. If a separate working group is established solely for communication and engagement, then use the *Communication and Engagement Plan Template* (Appendix A), alongside coordinated discussion with other working groups, to create an aligned communication and engagement plan for both state- and institutional-level activities. Refer to Appendix B to view a *Sample Communication and Engagement Plan* (Appendix B).

Communication and Engagement Practices	Considerations
Build champions and advocates among task force and working group members, or interested individuals.	<ul> <li>Prepare talking points for a common message.</li> <li>Create a PowerPoint slide deck and informational materials for presentations.</li> <li>Help people practice for presentations and for representing the work, and to prepare for tough questions.</li> <li>Ensure champions have up-to-date information.</li> </ul>
Create an online repository of information.	<ul> <li>Provide any resources, references, or data that the task force found especially useful or enlightening.</li> <li>List events.</li> <li>Post updates and informational materials.</li> <li>Prepare videos of champions talking about the work.</li> </ul>
Find different ways to engage others in the work.	<ul> <li>Create opportunities for discussion around data, research, student interviews, etc.</li> <li>Organize site visits to model programs.</li> <li>Help departments and college to organize local events.</li> </ul>
Think broadly about stakeholder groups.	<ul> <li>Consider who will be impacted by the recommendations: administrators, advisors and other student support staff, client disciplines, etc.</li> <li>Research how these groups receive information: professional associations, events, discussion forums, etc.</li> </ul>



Communication and Engagement Practices	Considerations
Think in multiples: multiple delivery methods, multiple audiences, multiple times.	<ul> <li>Multiple delivery methods</li> <li>Consider disseminating via state and regional events, local events, virtual events, newsletters, email blasts (general or targeted), etc.</li> <li>Multiple audiences</li> <li>Ask: Who is the audience? What is the right message for this audience at this time? Who should deliver the message to this audience so that it has legitimacy?</li> <li>Multiple times</li> <li>Consider how communication and engagement activities work together. People need to hear things multiple times, people want to deepen their understanding over time, and people want to be respected and to contribute. (Approach each activity with the assumption that the audience is a valuable part of the math pathways effort.)</li> </ul>

## Developing a State Action Plan Toolkit Appendix A: Communication and Engagement Plan Template



stakeholder groups. **Purpose:** This template is designed to help develop a strategic plan for communication and engagement with diverse

**Users:** Task force members; possibly a working group

should be planned strategically at appropriate times for appropriate audiences. information and, potentially, provide input. It also creates interest and a sense of ownership. Opportunities for engagement stakeholders, but it also includes finding meaningful ways to engage them. Engagement allows people to interact with Instructions: Developing an effective communication and engagement plan not only involves communicating information to

following questions: Use this template to facilitate and document a discussion to build a communication and engagement plan. Consider the

- Who needs to know? Consider different stakeholder groups.
- What do they need to know? Tailor the information to the audience.
- When do they need to know it?
- target audience(s)? How do they get information? Are there existing venues or platforms (e.g., events, newsletters, blogs) that reach the
- How can people engage with the information?

## Step 1: Identify audience and needs.

Venues or Platforms	When does the audience need to be informed?	Type of Information or Engagement	Audience



Step 2: Plan specific activities.

		Audience
		Activity or Product
		Delivery Method and Frequency
		Who's Responsible
		Deadline

# Developing a State Action Plan Toolkit **Appendix B: Sample Communication and Engagement Plan**



## Step 1: Identify audience and needs.

math faculty	0,550	MAA ASA - conferences and other
•		events, newsletters, websites
		List of math department chairs
College and	Inform.	Department of Higher Ed
University		communications
Presidents		
Deans, Provosts,	Inform, consult with representatives on	State administrator associations
VPs of Academic	specific issues.	Department of Higher Ed
Affairs		communications
Advisors	Inform, gather input.	State affiliate of NACADA, state
		association of directors of advising
		<ul> <li>conference website</li> </ul>

### Step 2: Plan specific activities.

Audience	Activity or Product	Delivery Method and Frequency	Who's Responsible	Deadline
Math chairs	Email updates to math chairs (2- and 4-year); coordinate with Math Pathways Working Group.	September, November, February, April	Bryant	3rd week of each month listed
General	Build mailing list (sign-ups at events, on website).	Website, events	Louis	Ongoing
Math faculty	th faculty: questions and	Will be sent to math chairs and   Jonathon	Jonathon	0pen



Audience	Activity or Product	Delivery Method and Frequency	Who's Responsible	Deadline
	concerns about task force recommendations; identify model programs	any math faculty on mailing list, posted on website, disseminated through associations.		October 15; close November 2
Math faculty	Contact presidents of state affiliates for math professional associations and plan for how to use association platforms; coordinate with Math Pathways Working Group.	Will be determined by association.	Bryant – MAA and ASA Miguel – AMATYC and NADE	September 15
General	Develop common set of talking points and slide deck for task force members to use (PowerPoint versions for math faculty, advisors, and administrators).	Host webinar to review; task force members will volunteer for presentations as opportunities arise.	Anandi – will also coordinate assignments for presentations	September 30
General	Develop a one-page handout about math task force.	To be used as needed at events; posted on website.	Jenna	September 30
Advisors	Coordinate with Advising Working Group to present at state advisors conference.	Conference presentation, and follow-up webinar for those not in attendance.	Anandi	October 27
General	Newsletter and webinar updates	December and April Ask Department of Higher Ed and associations to help distribute.	Jenna	2nd Monday of December and April
Math faculty	Local discussion groups: Encourage math chairs to host discussions locally; provide background reading (e.g., Modernizing Entry-Level Mathematics Programs: The Case for Mathematics Pathways) and suggested discussion	Ongoing; coordinated with Bryant on email updates to chairs.	Jonathon	Prep materials and start outreach by October 1

March	Louis and Bryant	Convening with task force and faculty presentations; video presentations (make available on website)	Math faculty convening: Showcase model programs; coordinate Math Pathways Working Group	Math faculty
October	Amandi	Advisory group will help develop full plan.	Convene advisory group of deans, Provosts, and Vice-Presidents to get input on communication strategies.	Administrators
Website up by October 1 2nd Monday of October and February	Louis Amandi coordinate with department staff	Supplementary materials to support general info (e.g., handouts); Update every 2 months.  Emails in October and February (Announce resources for local presentations and local discussion groups; promote website, announce events.)	questions. Math task force members will attend or call in if possible.  Website – collaborate with Department of Higher Ed Dana Center Mathematics Pathways resource site – state page  Department of Higher Ed communications to administrators and presidents	General Administrators
Deadline	Who's Responsible	Delivery Method and Frequency	Activity or Product	Audience

	Developing a State Ac	tion Plan to Enact Recommend	ations
Suggestions for Use:			
* The math task force or some	template as a common planning and reporting t subgroup should synthesize the separate worki led to fit your process. See the sheet "Sample Sta	ng group plans into a cohesive plan to e	ensure that interrelated work is appropriately aligned.
Working Group Charge, Time		te Action Plan Tor an example of now t	ne temprate can be used.
Enter recommendation from state tas			
Timeline of Activity:			
Deliverable:			
W 1: C m::1			
Working Group Title: Working Group Chair:			
Working Group Members:			
Recommendation(s)			
Enter recommendation from state tas	sk force report below.		
<b>Goal Setting</b>			
We recommend setting a long-term g	oal that captures the vision of what enactment of the reco l be measurable. We suggest a 3- to 5-year timeline.	ommendation will look like. This may have alre	eady been done in the recommendation itself or in the Plan for Scaling. I
not, drait a goal now. The goal should	be measurable: we suggest a 3- to 3-year timeline.		
General Strategy for Enactme	ent of the Recommendation(s)		
Write a general description that sum	marizes the strategy for enactment.		
		Timeline	
Create a timeline with milestones, ac	ctivities, and resources that will be needed. A milestone is	a key achievement that contributes to accomp	dishing the overall goal. Each milestone may require multiple activities.
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### Appendix C: SAMPLE State Action Plan to Enact Recommendations

### Suggestions for Use:

- \* Working groups can use this template as a common planning and reporting tool.
  \* The math task force or steering committee should synthesize the separate working group plans into a cohesive plan to ensure that interrelated work is appropriately aligned.
  \* Modify this template as needed to fit your process. See the sheet "Sample State Action Plan" for an example of how the template can be used.
  \*Working Group Charge, Timeline, & Deliverable

The Math Pathways Working Group will create a plan for implementing Task Force Recommendation 2 that every college offer at least two math pathways based on existing courses in the state transfer module (statistics, math for liberal arts, or college algebra).

See the full Task Force Recommendations report for details.

The Math Pathways Working Group will focus on work with math departments to develop courses and define alignment. The group will collaborate with the Advising Working Group and the Communication and Engagement Working Group.

Timeline of Activity:	Working group action plan template is due February 1, 2017.
Deliverable:	Submit Rec 2 working group action plan template to task force.
Working Group Title:	Math Pathways Working Group
Working Group Chair:	Melissa Reynolds
Working Group Members:	Steve Phillips, Lisa Merino, Jessica Lotz, Shelby Richardson
Pacammandation(c)	

Every college and university will offer at least 2 math pathways to students at both the developmental (if applicable) and gateway levels and have a viable plan for ensuring that students go into the appropriate pathway based on their programs of study.

### oal Setting

ting a long-term goal that captures the vision of what enactment of the recommendation will look like. This may have already been done in the recommendation itself or in the Plan for Scaling.

W. The goal should be measurable. We suggest a 3- to 5-year timeline.

By Fall 2018, every college and university in the state will offer at least 2 math pathways with clear recommendation for which pathway is most appropriate for which students.

### General Strategy for Enactment of the Recommendation(s)

Write a general description that summarizes the strategy for enactment.

We hope to identify 10 early adopters who will implement math pathways in Fall 2016 with the additional 15 colleges following the next year. We will also set metrics for assessing depth of implementation at institutions

Disseminate information statewide. Build from existing model program and find local leaders who will help others implement. Hold a few key events to support implementation. Create a website with information and resources.

eate a timeline with milestones, activities	<b>Timeline</b> s, and resources that will be needed A milestone is a key achievement that contributes to accom	olishing the overall goal. Each milestone may require multiple activiti	
	de dissemination of information to math faculty and administrators in collaborat		
	g Group. CEP will focus on development of materials and written documents. Our	group will help identify venues and opportunities and	
Milestone: deliver			
Leads for Milestone: Steve as Deadline:		Resources Needed	
Deadline:	Activity	Resources Needed	
8/15/15	Work with C&E working group to develop a standardized presentation and written information to be disseminated at events.		
8/15/15	Create a list of all professional associations, publications/online venues, and events likely to include math faculty and administrators.		
9/5/15	Prioritize groups and venues for outreach: plan for presentations/ publications; meet with and engage leadership of associations.		
10/1/15	Recruit and train 3-5 faculty who will do presentations identified in the plan above and also who will offer to do presentations at colleges.		
Start in September 2015, ongoing	Work with C&E to send out bimonthly updates to math chairs.		
	2016, at least 10 colleges will implement pathways as "early adopters."		
Leads for Milestone: Jessica			
Deadline:	Activity	Resources Needed	
9/30/15	Survey math chairs to identify existing successful programs.		
10/1/15	Dept of Higher Ed will provide a webpage on site for resources and information. C&E working group will manage the webpage.  Dept of Ed has agreed to support work.		
early October 2015	Compile list of resources that will help colleges and faculty	Check with Dana Center for resources	
early October 2015	Consult with IR experts at state and local levels on data collection plan.	rels on data collection plan.	
mid-October 2015	Statewide convening of math faculty and administrators to launch work; showcase existing models and share resources.  NAC has agreed to host. Colleges will need to pay for the convenience of the convenie		
late October 2015	Hold webinar with condensed version of information from convening for those who were not able to attend.	Dept of Ed can host webinars.	
December 2015	Goal: At least 10 institutions sign a commitment letter as "early adopters" lto add or improve math pathways over the next year. Colleges will agree to collect and analyze the data. submit enrollment and success data.		
Spring 2016	Offer support for early adopters: Can we do a workshop with Dana Center Designing Math Pathways Workshop?	Coordinate funding and logistics for the workshop.	
September 2016	Early adopters submit data on fall enrollments.	T * * - * - * - * - * - * - * - * - * -	
January 2017	Early adopters submit data on completion rates for first semester.		
February 2017	Hold webinars that spotlight promising practices with early adopters.		
	ber $2015$ , develop a data collection and evaluation plan to measure progress on i	mplementation and impact.	
Leads for Milestone: Melissa			
Deadline:	Activity	Resources Needed	
August 2015	colleges and universities.		
September 2015	Send a data collection and evaluation plan to selected representatives for vetting.		
mid-October 2015	Have final plan ready for statewide convening.		

Communication and Engagement			
Consider what groups or stakeholders will be impacted by this recommendation and activities. Are there any groups that need to be informed or consulted during the process of drafting the plan for enactment?			
Groups	Informed or Consulted?	Plan for Communication and/or Engagement	
2- and 4-year math faculty	Consulted	Professional association meetings, newsletters, and special events. More details in timeline. Compile list of math chairs; work with Communication and Engagement working group to disseminate information.	
Client disciplines		Support math faculty for local engagement.	
Administrators	Informed	Professional association, Dept of Higher Ed meetings, newsletters, and special events.  More details in timeline.  Support math faculty for local engagement.	

on may contribute to or be dependent upon progress for other recommendations. Note these connections her

Advising Working Group will develop plans for communications to and training of advisors. Communication and Engagement Working Group will support our communication efforts as noted above.