Tips for Developing a

Good Work Plan,

Goal Setting, and Q&A

WIOA
Professional Development
americanjob**center**

Illinois
Department of Commerce
& Economic Opportunity
OFFICE OF EMPLOYMENT & TRAINING

icsps
impacting
educational
equity

Illinois Center for Specialized Professional Support,
Illinois State University, College of Education

Presented By

- Aime'e Julian, PhD
  - Director
  - Illinois Center for Specialized Professional Support
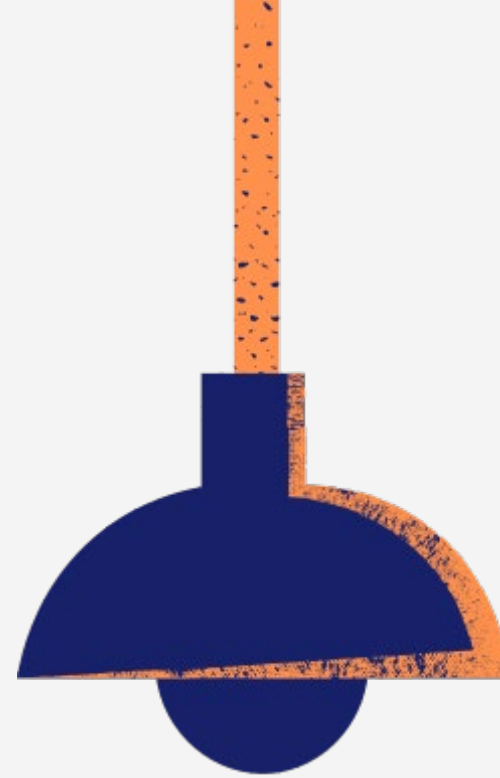
Presented By

- Molly Cook
  - Director, Extended Capacity Consulting
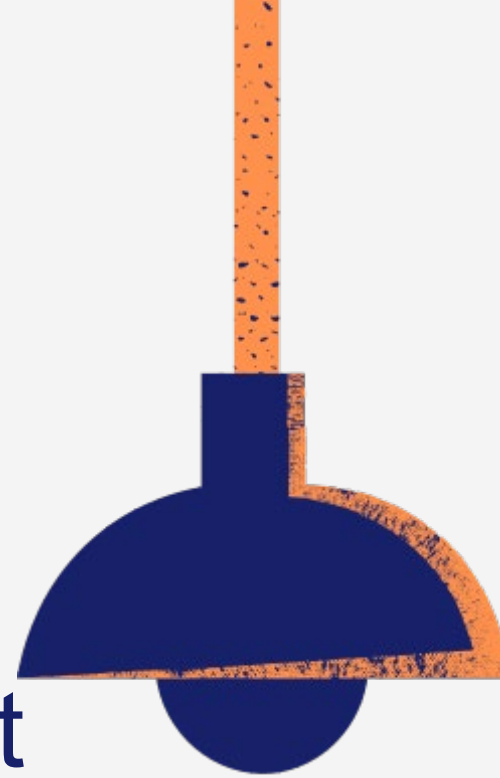 - Consultant, Illinois Center for Specialized Professional Support

Poll

How many of you are on teams that, more often than not, reach their deadlines and goals?

Chat

Thinking back on past teams you've been a part of, what is one thing a project manager, coach, or leader has done well to motivate your team or keep you on track?
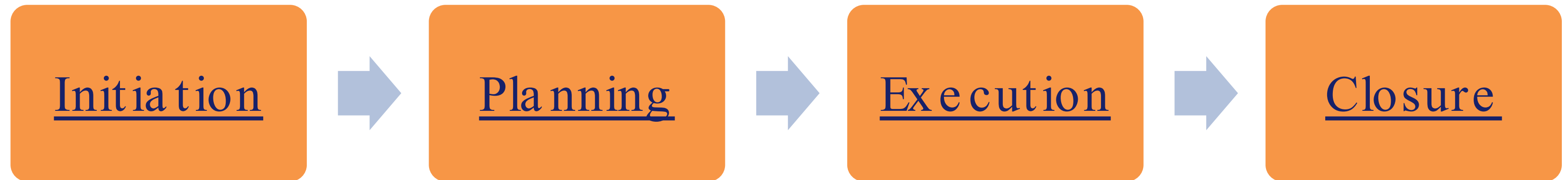
Developing a Good Workplan

- Project Lifecycle

- Tips for each phase of the project lifecycle

- Resources

Project Lifecycle

Initiation → Planning → Execution → Closure
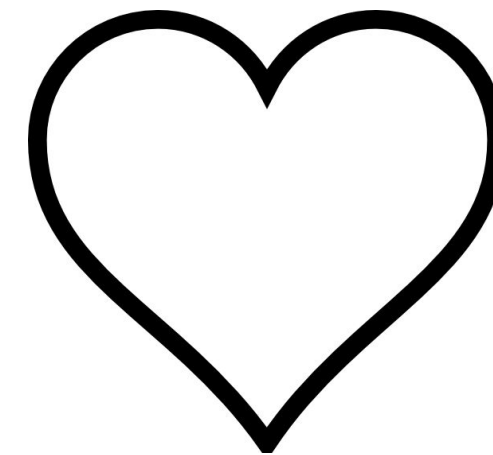
Pre-Phase 1

📌 Talk to others

📌 Research other programs/groups that complete similar work

📌 Consider your work style

| Who do I work well with? | Why do I care about this topic/cause? | What time do I have to give to this project? |

"Self awareness and self love matter. Who we are is how we lead."

-Brené Brown, Dare to Lead, pg.11

SELF-AWARENESS IS THE FIRST CHAPTER IN THE BOOK OF LEADERSHIP

-Nadeem Saeed

Chat

What steps do you usually take prior to joining a team or taking on a project manager/staff role?

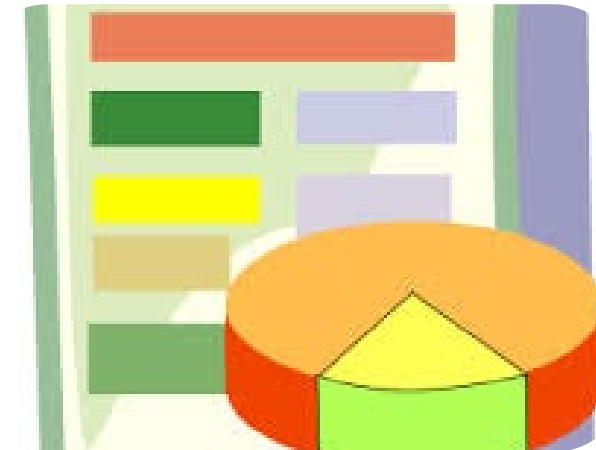Are there any that you wish you did?
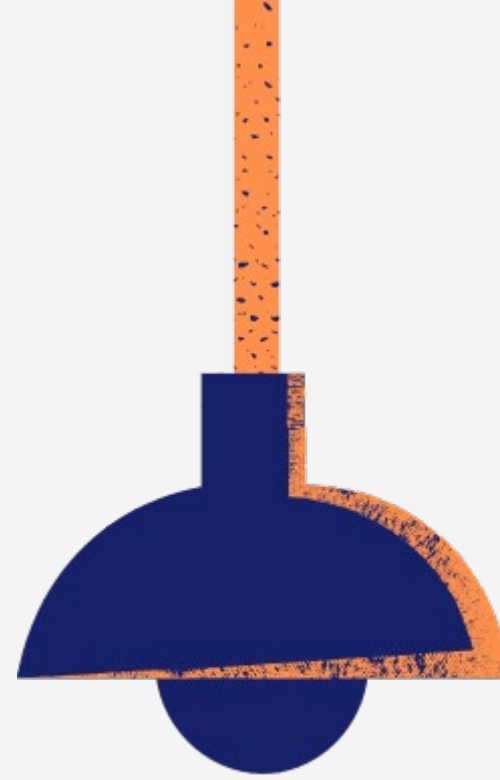
Phase 1: Initiation

Project Charter

- Deliverables
- Objectives (Charges/ Priorities)
- Stakeholders
- Time
- Budget
- Scope
- Team Members
- Risks
- Success Criteria

Define the vision/ mission

Create a structure (workgroups)

Set deadlines

Determine budget, staff, and members

Example

EQUITY TASK FORCE WORKGROUP GUIDE

ILLINOIS WORKFORCE INNOVATION BOARD

Data Analysis Workgroup
Assessing, analyzing, and recommending education and workforce tools that can track program access and outcomes and disaggregate data to reveal disparities in policies and program delivery.
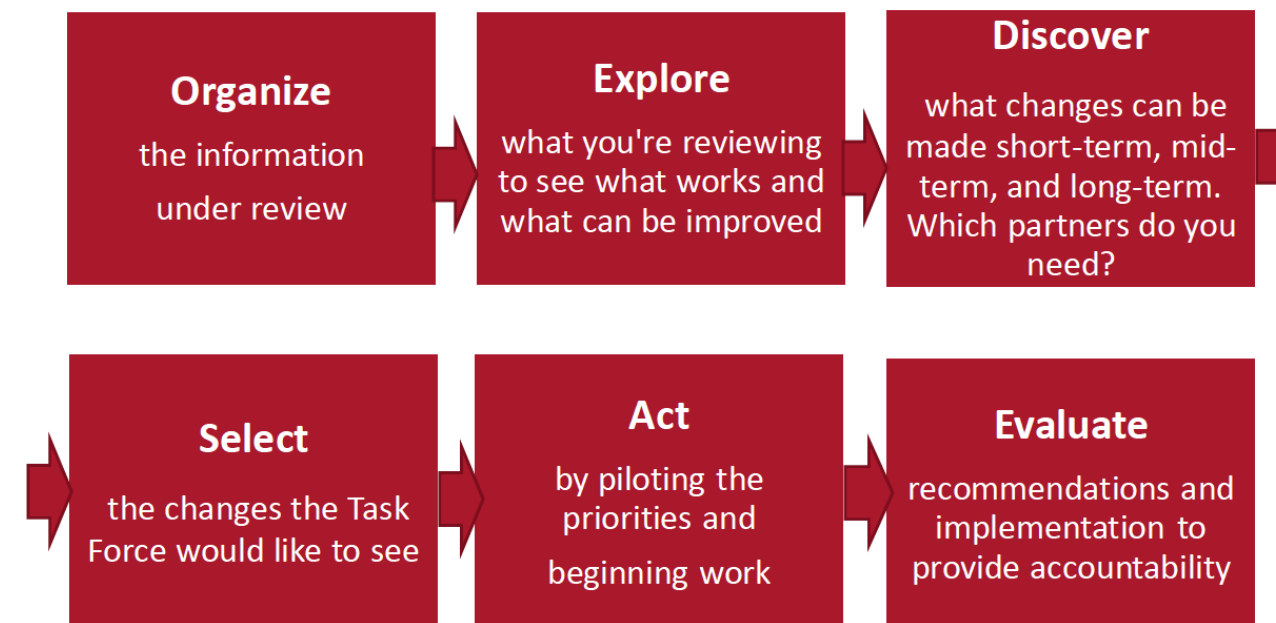
Policy Workgroup
Examining programs, policies, and practices to infuse issues of equity and inclusion into these programs, policies, and practices as authorized by law.
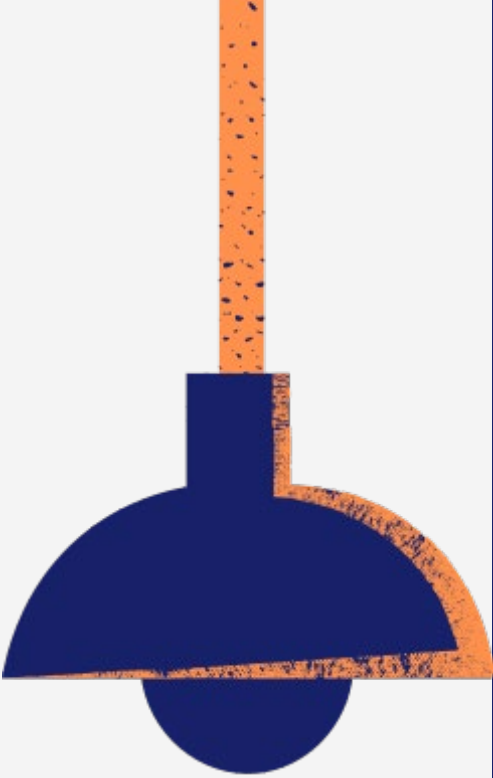
Program Workgroup
Making recommendations regarding inclusive and diverse approaches, including professional development of staff, to ensure use of an equity lens in serving their diverse populations.

Target Populations as our scope: Women, rural residents, people of color, individuals with disabilities, veterans, justice-impacted populations, immigrant populations, LGBTQ community, homeless and homeless youth, low income individuals, foster care youth and alumni, migrant and seasonal workers, individuals working to achieve their high school equivalency, persons receiving public assistance, individuals who are basic skills deficient.

Framework and Approach:

Organize
the information under review

Explore
what you're reviewing to see what works and what can be improved

Discover
what changes can be made short-term, mid-term, and long-term. Which partners do you need?

Select
the changes the Task Force would like to see

Act
by piloting the priorities and beginning work

Evaluate
recommendations and implementation to provide accountability

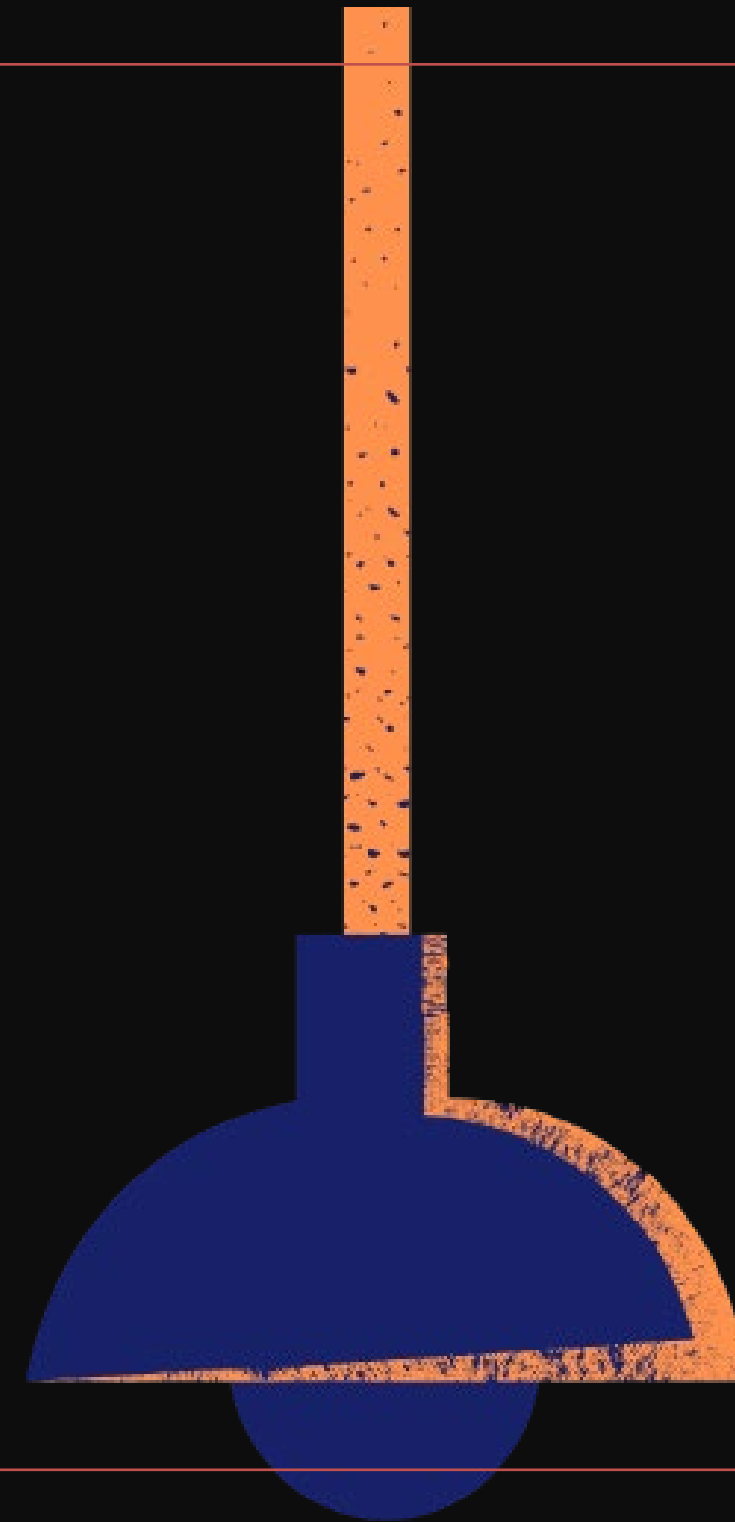**ILLINOIS workNet CENTER**
americanjobcenter

Time

"A cognitive quirk called the planning fallacy leads us to consistently underestimate how long it will take us to complete a project"

Team Members

- "The strength of the team is each individual member. The strength of each member is the team."

- - Phil Jackson

Four Domains of Team Strength

EXECUTING	INFLUENCING	RELATIONSHIP BUILDING	STRATEGIC THINKING
People with dominant Executing themes know how to make things happen.	People with dominant Influencing themes know how to take charge, speak up, and make sure the team is heard.	People with dominant Relationship Building themes have the ability to build strong relationships that can hold a team together and make the team greater than the sum of its parts.	People with dominant Strategic Thinking themes help teams consider what could be. They absorb and analyze information that can inform better decisions.
Achiever Arranger Belief Consistency Deliberative Discipline Focus Responsibility Restorative	Activator Command Communication Competition Maximizer Self-Assurance Significance Woo	Adaptability Connectedness Developer Empathy Harmony Includer Individualization Positivity Relator	Analytical Context Futuristic Ideation Input Intellection Learner Strategic

Strengths Finder

ANALYSTS

Intuitive (**N**) and Thinking (**T**) personality types, known for their rationality, impartiality, and intellectual excellence.

Architect INTJ	Logician INTP	Commander ENTJ	Debater ENTP

DIPLOMATS

Intuitive (**N**) and Feeling (**F**) personality types, known for their empathy, diplomatic skills, and passionate idealism.

Advocate INFJ	Mediator INFP	Protagonist ENFJ	Campaigner ENFP

SENTINELS

Observant (**S**) and Judging (**J**) personality types, known for their practicality and focus on order, security, and stability.

Logistician ISTJ	Defender ISFJ	Executive ESTJ	Consul ESFJ

EXPLORERS

Observant (**S**) and Prospecting (**P**) personality types, known for their spontaneity, ingenuity, and flexibility.

Virtuoso ISTP	Adventurer ISFP	Entrepreneur ESTP	Entertainer ESFP

16 Personalities

Consider Small Group Roles

Consider the roles that members tend to take on including task, relationship, and disruptive roles.

Task Roles
- Information seeker/giver
- Organizer
- Clarifier
- Elaborator
- Evaluator
- Initiator

Relationship Roles
- Gatekeeper
- Harmonizer
- Tension Reliever
- Supporter

Disruptive Roles
- **Blocker**
- **Avoider**
- **Credit Seeker**
- **Distractor**
- **Dominator**

Phase 2: Planning

📌 Create a workplan

📌 Develop a system

📌 Create workgroups

ATTACHMENT I - PROJECT IMPLEMENTATION PLAN

Note that successful grantees will be required to develop a more complete workplan.

List the major project activities in the first column. In the second column, indicate the timelines for completion of the activities. Timelines may be specified by the month of the project (e.g., such as month 1, month 2, etc.) or by specific dates. In the third column, indicate the staff by name and title responsible for performing the activities, and indicate the organizational affiliation of each staff person listed. The fourth column must describe the deliverable associated with the project activity. [Expand the table as needed].

ACTIVITY	TIMELINE	RESPONSIBLE STAFF	DELIVERABLE

Sample plan from workNet

Workplans

CPTP Disability Workgroup

Charge:
Identify and provide strategies and recommendations for eliminating barriers to ongoing employment for individuals with disabilities.

Priorities:
- *Service integration:* Highlight opportunities for funding, collaboration among agencies, best practice business models, referrals, etc.
- *Career pathway awareness:* Align focus and priorities around career pathways that support ongoing employment for individuals with disabilities
- *Continuous improvement:* Identify opportunities for ongoing improvements in collaborative efforts, awareness raising opportunities, and advocacy

Driver/Anchor	Deliverable	Status	Timeline

Workplan

📌 Incorporate charges and priorities

📌 Consider the steps to achieve each charge and priority

📌 Determine the realistic time allotment you and group members have

Create an evaluation framework for the WIOA system including evaluation elements of policies, programs, and processes
created or overseen by the IWIB to be used by the WIOA system.

Driver/Anchor Description	Expected Outcome Activities	Deliverable	Target Delivery Date
Create a draft framework based on the DOL 2020 Evaluation Toolkit	All Workgroup members provide feedback on the document Determine additions to the document, including fillable forms, executive summary, and definitions Make edits based on workgroup, CIC feedback, and equity definition from Equity Task Force	Draft Illinois Evaluation Framework/Toolkit	April 2021
Pilot the evaluation of programs, policies and processes using the framework	Identify 6 programs, policies, and processes to pilot using the framework Assign workgroup members to pilots as 'point persons' for communication and assistance Create a process to solicit feedback from the pilots	Models and examples of utilizing the Evaluation Framework	September 2021
Present to the IWIB a final Evaluation Framework	Edit framework based on pilot results/suggestions Present edited framework to full CIC Present edited framework to WIOA partners for feedback Present framework to the IWIB for adoption	Evaluation Framework for the IWIB	October 2021
Disseminate the Evaluation Framework to WIOA partners	Share with all WIOA Partners	A working Evaluation Framework	December 2021

Example

Drivers:

Execute a customer centered design service delivery model

Better prepare staff to effectively serve business and individual customers

Demonstrate a business-demand driven orientation and establish strong business partnerships

Funding opportunity for piloting best practices in Equity work

Anchors

Integrated business services framework for state and regional workforce and economic development programs

Cross-Agency development of staff and WIOA system stakeholders

Expand access to information and resources

Establish direct relationships among diverse stakeholders

Expected Outcomes

Identification of best practices in equity-based decision-making among organizational leadership and in service delivery

Identification of best practices for assessing performance and performance metrics in evaluating organizational capacity and service delivery

Identification of strategies and programs for providing high-quality professional training

Tips for Presenting Complex Information

Agenda

Facilitator

Visual Aids

Follow-up materials

Present to someone else first
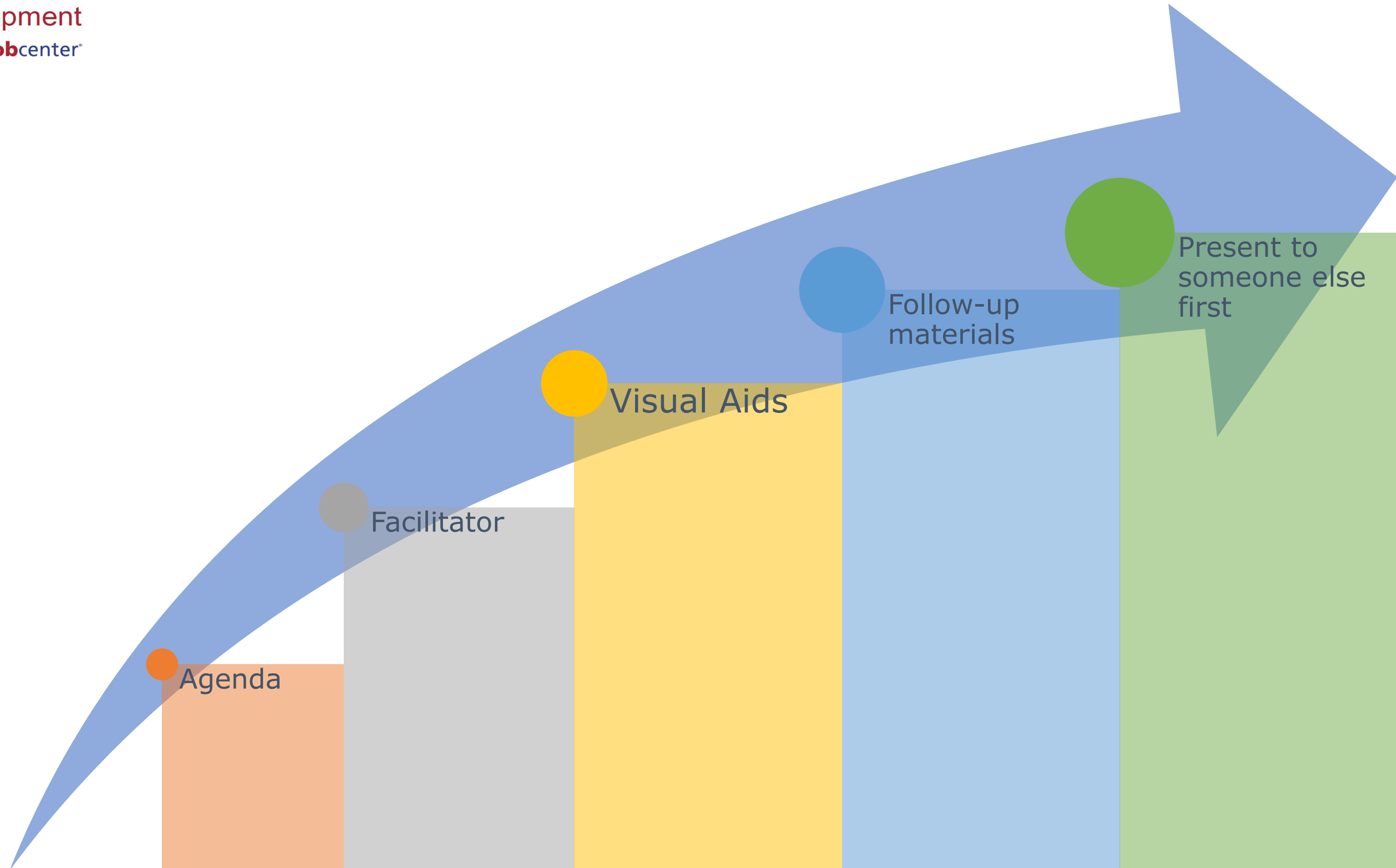
Develop a System

How will you communicate as a team?

- Teams
- Calendar Invites
- Google Drive
- Group Me
- Stand Up Meeting
- Run of Show

Run of Show Example

TIME (AM)	PRESENTER/ACTOR	ACTIVITY	Pass to Next	Tech Action	VIDEO	NOTES
8:10	Molly/Sarah	Confirm Zoom is working		Check Zoom phone and video	NONE	
	Sarah	Controls PowerPoint		PowerPoint	NONE	
	Terah	Monitors Chats		Chats	NONE	
	Molly	Make Sarah, Jeannette co-hosts		Co-Host	NONE	
8:15	ALL	All Core Team Arrives		Login to Zoom	NONE	

Create workgroups

Organize
the information under review

Explore
what you're reviewing to see what works and what can be improved

Discover
what changes can be made short-term, mid-term, and long-term. Which partners do you need?

Select
the changes the Task Force would like to see

Act
by piloting the priorities and beginning work

Evaluate
recommendations and implementation to provide accountability

Set charges & priorities.

An opportunity for members to have increased leadership

An opportunity for members to use specific skills sets
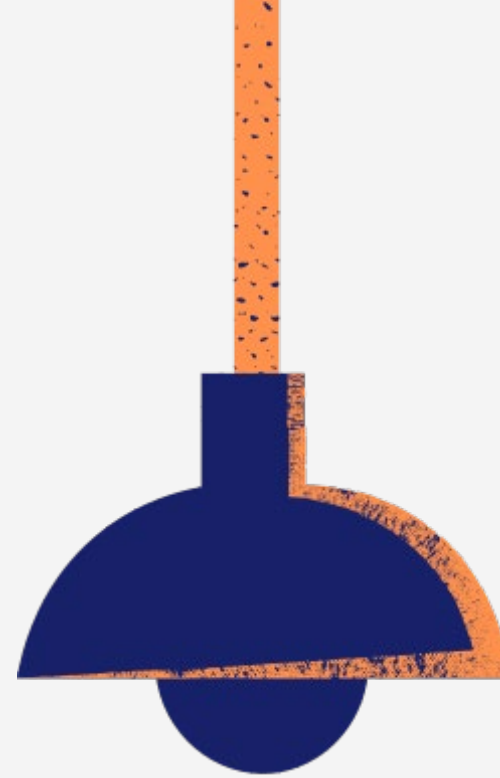
Phase 3: Execution

📌 Include goals and next steps in all agendas and notes
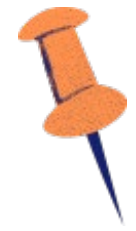
📌 Check-in with workgroups and members

📌 Pilot Test

"Daring leaders must care for and be connected to the people they lead."

-Brené Brown, Dare to Lead, pg. 12

5 Features of an Effective Goals-Setting Process

1 Set Specific Goals

Set goals that are well-defined. For instance, generate 10 leads, who are decision-makers, this month is being specific. Do not set imprecise goals like generate more leads.

2 Measurable Goals

Goals should be measured to know how far we have traveled in achieving our desired outcomes.

3 Attainable Goals

You cannot set unrealistic goals that demotivate your workforce. Your employees should be able to achieve the goals with some extra effort and time.

4 Relevant Goals

Set goals that are relevant to an employee's job description. You cannot expect a salesperson to generate more leads using marketing tools.

5 Time-Bound Goals

When you set goals, set the deadline for those goals. Without target time, we keep working toward the goal but hardly achieve it. Time-bound goals drive us toward success.
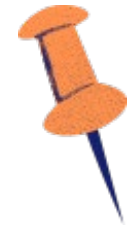
Phase 4: Closure

- Evaluate your progress

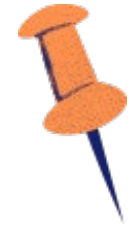- Should the work carry on?

- Ask for member evaluations.

- Express appreciation

Conclusion

Be realistic in time expectations

Check-in with members

Determine communication methods early

For resources, links, and ideas visit this Padlet.

Questions?

Tammy Stone
Public Services Administrator, Office of Employment & Training
Illinois Department of Commerce & Economic Opportunity
O: 217.557.5549 Tammy.Stone@illinois.gov