

How do we get started checklist?



Reflect on the role you currently play with institutions

Think about how you currently engage with institutions: What services and support do you currently provide? Will this method allow you to engage differently or support deeper reflection at institutions? Can you foresee a need to expand your capabilities or resources to provide support to institutions as you work along the continuous improvement process?



Prepare by familiarizing yourself with the method and materials

Review all the materials and tools available and decide how you'll deploy them with your participating institutions. Think about timing and how the ITA and Sense-Making Conversation could be incorporated into existing campus initiatives. How do they fit into current (or new) initiatives? How do they fit in with your intermediary-institution relationship to date? Decide, or discuss with the institution, how engaged you'll be—high-level support or on the ground facilitating conversations?



Consider organizational efficiency

Think about your position as an outside intermediary working with multiple institutions. Could your participating institution benefit from working in a cohort? You could create opportunities for mentorship or outside perspective—as an intermediary you have a special vantage point to make those connections.



Kick off your engagement

Set time to connect with your institution(s). Plan a kick-off meeting to review the activities that will take place, and be sure the institutional team leads feel supported and secure in the plan to move forward. Discuss the timeline and where the team leads feel they will need your targeted assistance the most.



Plan for ongoing support

The reflections and conversations driven by this process will shed light on areas of opportunity, and institutions will want to know what comes next. Be prepared to support institutions as they move beyond reflection and into action.