



HOW TO ENGAGE YOUR TEAM IN THREE-YEAR PLAN DEVELOPMENT

HOW CAN PROGRAM OR DEPARTMENT LEADERS ENGAGE THEIR TEAM MEMBERS IN CREATING THREE-YEAR PLAN?

It is important to set aside dedicated time for brainstorming and developing the Three-Year Plan. Integrating a Three-Year Plan development item into regular meetings or dedicating retreat time specifically for planning is a great way to do this.

Below is a guide to engage your team in creating your Three-Year Plan, organized across two meetings:

- Meeting #1 is for brainstorming ideas for the Three-Year Plan.
- Meeting #2 focuses on transforming those ideas into a concrete Three-Year Plan.

MEETING #1 – BRAINSTORMING IDEAS FOR THE THREE-YEAR PLAN

- Schedule a time for your team to brainstorm potential goals for your Three-Year Plan.
 - Before the Team Meeting:
 - Email your team the [Three-Year Plan Brainstorming Exercise and Worksheet](#) and meeting discussion.
 - During the Team Meeting:
 - **First**, designate a team member, or yourself, as the recorder responsible for compiling a master list of the shared brainstorming ideas.
 - **Second**, start by having team members share potential goals they brainstormed on the [Three-Year Plan Brainstorming Exercise and Worksheet](#) you emailed to them before the meeting.
 - The recorder should compile these ideas on a master list.
 - If you are meeting in person, the recorder can list them on a whiteboard, etc.
 - If you are meeting via Teams, consider having the recorder share their screen and type information in a Word document.
 - **Third**, once your team members have shared their ideas, begin refining the list to the goals you would like to further develop for the Three-Year Plan.
 - As the leader, you want to walk away from this meeting with a refined list of at least three potential goals specific to your program or department.
 - You or the recorder should compile this refined list, ideally in a Word document, that you can send to the team.
 - After the Team Meeting:
 - Send the refined list of potential goals to the team, along with information about the next team meeting dedicated to further development of the goal elements.



HOW TO ENGAGE YOUR TEAM IN THREE-YEAR PLAN DEVELOPMENT

Email template for Three-Year Plan Brainstorming session with your team:

- Plan to send this email at least one to two weeks before your program or departmental meeting, where you will brainstorm potential goals.
- Edit the message as desired to fit your voice or as an addition to your regular communications.
- You will need to attach the [Three-Year Plan Brainstorming Exercise and Worksheet](#).
 - The worksheet is available in the [Integrated Planning Resource Hub](#).

EMAIL TEMPLATE

Hi Team,

One of the key foundational elements at OTC is the Strategic Planning process. As part of this process, programs and departments system-wide, including ours, complete a Three-Year Plan designed to help align the priorities of the college, our program or department, and division for the upcoming three years.

At our [insert date] program or departmental meeting, we will brainstorm potential goals for the upcoming three years (2025-2028).

Attached to this email is a brief Three-Year Plan Brainstorming Exercise and Worksheet. Please bring a complete copy of this worksheet to our team meeting. At our meeting, we will discuss potential ideas and, as a team, identify goals we would like to focus on for 2025-2028.

If you have any questions, please let me know!

[Insert Your Email Signature]



HOW TO ENGAGE YOUR TEAM IN THREE-YEAR PLAN DEVELOPMENT

MEETING #2 – TRANSFORMING IDEAS INTO A CONCRETE THREE-YEAR PLAN

- Schedule a time for your team to develop your Three-Year Plan.
 - Before the Team Meeting:
 - Email your team the [Three-Year Plan Development Worksheet](#) and meeting discussion.
 - During the Team Meeting:
 - **First**, designate a team member, or yourself, as the recorder responsible for completing the [Three-Year Plan Development Worksheet](#).
 - **Second**, start with the first goal you would like to develop and complete the [Three-Year Plan Development Worksheet](#) for that goal.
 - You will not have to submit this worksheet, so no worries about making sure it is perfect! The worksheet will really help you not only put your thoughts on paper, but it will also help you when you enter your information in Diamond.
 - As the leader, you want to walk away from this meeting with a Three-Year Plan Goal Development Worksheet created for each of your goals.
 - After the Team Meeting:
 - Share your developed goals with your Dean or Vice Chancellor and request their feedback prior to entering into Diamond.

Email template for Three-Year Plan idea development session with your team:

- Plan to send this email at least one week before your program or departmental meeting.
- Edit the message as desired to fit your voice or as an addition to your regular communications.
- You will need to attach a copy of the goals you developed in your brainstorming session.

EMAIL TEMPLATE

Hi Team,

Thank you for all the great goals you brainstormed for our program or department's Three-Year Plan.

At our next program or department meeting, we will work on developing the steps, resources, and assessments we will take to complete each goal.

I have attached to this email a copy of the goals we would like to focus on for 2025-2028. Please begin brainstorming ideas for achieving these goals in preparation for our meeting.

If you have any questions, please let me know.

[Insert Your Email Signature]