

## 2015 Management Retreat Debrief to Management Team

### Context:

The following information is distilled from an approximately 4-hour process that occurred at the Management Retreat at the UCLA Conference Center in Lake Arrowhead on June 18 and 19, 2015.

It began with the creation of a list of topics of interest generated by the managers from which was eventually chosen four topics to discuss based on what we considered to be pressing needs: mentoring, bridging silos, work-life balance, and customer service. The managers then brainstormed information regarding these topics in response to four prompts:

- 1) What would the ideal form of this topic look like?
- 2) What are the potential challenges or obstacles?
- 3) How can we use our influence to accomplish this?
- 4) What can the College and/or Executive Team do to help make this occur?

### Introduction:

Contained in this debriefing is a summary of the brainstorming described above, condensed into four themes identified as common across all four topics:

#### **Common themes defined:**

**Value-** driving force and what is important to us as a college culture

**Strategy-** how the structure is executed (strategic actions)

**Structure-** elements of the plan and process (i.e. goals, modeling, training, retreats, follow-up etc.)

**Resources-** things needed to accomplish strategies to execute the structure

### **Mentoring**

**VALUE** - Secure encouragement and support from Executive Team, support each other, unite efforts, model the values (in interactions and communication).

**STRATEGY** - Define how the values, the structure, and resources are utilized or applied. (Examples: Define mentorship and its purpose; mandate Management retreat and Executive participation; identify what our succession plan looks like.)

**STRUCTURE** - Establish consistent elements for the mentoring process. Model from the top down. (Example: Create "match.com" for campus mentees/mentors)

**RESOURCES** - Secure money, time, and space to make it happen.

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### Bridging Silos

**VALUES-** Pursue equanimity, sharing, and collaboration of voice, efforts, and work across management.

**STRATEGY-** Create opportunities to share all voices and break down barriers in order to move from a reactive to a predictive state.

**STRUCTURE-** Foster a transparent process, communicate the information, and follow it consistently.

**RESOURCES** - Secure time and money and share information.

### Work-Life Balance

**VALUE** - Value and support personal and mental health.

**STRATEGY** - Tie College goals to workload.

**STRUCTURE** - Set clear, realistic, and consistent goals that we apply and assess.

**RESOURCES** - Secure time and staff. (Example: college hour)

### Customer Service

**VALUE** - Value everyone's role, be honest, be respectful, working together, understand boundaries. We are family; customers include students, community, *and* colleagues.

**STRATEGY** - Provide training to facilitate consistent and appropriate information dissemination across the College (including student workers). (Examples: Improving the College website; make people answer their phones; utilize quantitative and/or qualitative analysis to identify appropriate resource allocation--including information--and facilitate assessment).

**STRUCTURE-** Establish guidelines, expectancies, rewards, and consequences.

**RESOURCES-** Funds for staff, support, resources, and training.

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### Synthesized Objectives:

Although goals, outcomes, and strategic actions will be developed later, the following three objectives can be generalized from the focus of each of the above topics and can be used to guide further response and planning:

- 1) Break down silos: collaborate and communicate.
- 2) Move from a preventative to a predictive state (especially in planning).
- 3) Secure resources.

### Next Steps:

- 1) Form MPDC to create functional processes for the development of goals, outcomes, strategic actions, and assessment.
- 2) Work closely with Executive Team to ensure alignment across constituencies as well as transparency of processes and incorporation of values into functional culture of institution.
- 3) Secure appropriate resources to support planning and execution.