**FY 21 Strategy Dashboard**

**Overview**

This page will be used to update, track and document the progress with strategic initiatives. This site will include one dashboard that will provide a brief overview of the scope, schedule and resources for each initiative. More detailed pages are included for each initiative that are visible for project owners and managers.  These detailed pages are used during check ins to collect regular updates that will align with the progress notes on strategy dashboard.

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| Initiative Name | Initiative Description | Owner | Status | | | Progress Notes |
| Scope | Schedule | Resources |
| Advsior Experience & Pathways | Develop a career pathway for advisor aligned with a compensation schedule | Katrina Magdol | On-Track | On-Track | On-Track | Working to Revise and distribute Advisor Pathway Implementation FAQ with Comp Structure guide, launch March staff survey to measure satisfaction, engagement ,Raise up conversations around performance planning, management, and evaluation of Advisors – what does equity look like. -            Need EDs, Darin, and Sarah to align on comp structure guidance that I’m proposing - I need to work with PDs and EDs to determine the best ways to gather additional feedback on how the Pathways and corresponding comp structure is being received during this implementation year |
| Director, Culturally Responsive Programming | Hire A director-level role on the National Program Team to focus on culturally competent and responsive programming | Sarah Place | Complete | Complete | Complete | Sheneita Graham, alum and former employee,  was hired and started on 11/16 |
| Cultural Celebrations | Manage budget and process for celebrating and embracing  cultural identities of our staff and students | Sabrina & Laura | On-Track | On-Track | On-Track | Coordinated first cross regional day of celebrating the culture of our regional cities.Used about 1/3 of the budget.Continue coordination with regional DEI committees to encourage more usage of the funds. |
| Foundations Aligned Management | Foundations aligned coaching and training for leadership bodies (SLT & Managers) | Susan Sheppard/Katrina Magdol | Complete | Complete | Complete | WORK COMPLETED WITH THIRD SETTLEMENT |
| Manager Training Series FY21 | All people managers retrained on performance manage aligned to imporving org outcomes in aligment with Foundations | Katrina Magdol | On-Track | On-Track | On-Track | Helped program teams prepare for step-back conversations and mid-year Advisor to Senior Advisor promotions. Created and facilitated general hiring training for people managers Supporting managers through corrective action process, when necessary. Launch March staff survey to measure satisfaction, engagement. Need to Raise up conversations around performance planning, management, and evaluation of Advisors – what does equity look like? |
| Foundations Course | Development of a self-paced virtual “Introduction to Bottom Line’s Foundations” for new staff | Letitia Dowling | On-Track | Off-Track | At Risk | Course has been developed with consultant. Feedback received from staff and DEI committee. Final edits and next steps are being reviewed by HR Department. Need to determine what other resources are needed to complete the virtual course and launch plan. |
| Advisor Training | Training our advisors on how to help their students grapple with the stress and emotionality they are currently feeling, and may continue to feel, as people of color at PWIs | Sheneita Graham | On-Track | On-Track | At Risk | NO UPDATE |
| Student / Advisor Engagement | Launch and manage student and Alumni Advisory Committee to bring student voice to key org-wide initiatives | Sheneita Graham | On-Track | At Risk | At Risk | NO UPDATE |
| Foundations Aligned Branding | Revise BL’s style guide to address diversity, equity, and inclusion, and incorporating inclusive use of language (e.g., pronouns, group identifiers, avoidance of bias, etc.) | Billi Solia-O'Brien | Complete | Complete | Complete | STYLE GUIDE REVISED WITH CONSULTATION OF BOARD AND FEEDBACK FROM DEI AND OTHER ORG FOCUS GROUPS. Phase Two launched to provide comprehensive brand training for staff that is tailored to the ways in which they interact with the brand. |
| Internal Policy Review | Revise BL org Policies to improve alignment with Core Values and DEI Committement | Carmen Farias | On-Track | On-Track | On-Track | The committee will complete a survey by the end of February to prioritize the or policy review suggestions and determine the policies we will work on. The committee will also determine which framework it will use to ensure the recommended policy revisions are in line with our commitment to DEI and Foundations. The committee will then determine how they will divide the revision work among the members of the group |
| Internal Culture and Operations | Build Plan to work more effectively and build culture remotely | Letitia Dowling | Complete | Complete | Complete | FOCUS GROUP OF REGION REPS COLLECTED INPUT FROM REGIONS, MADE RECOMMENDATIONS TO SLT FOR IMPLEMENTATION TO IMPROVE REMOTE WORKING CULTURE IN FOUR AREAS. |
| BetterHelp | Provide our Success students with FREE UNLIMITED access to counseling or therapy. | Sarah Place | On-Track | On-Track | On-Track | NO UPDATE |
| Simplify and Streamline Advisor Data Management | Prototype and iterative design of dynamic reporting to help with the identification of insights that drive behaviors and inform decision-making. | Michelle | Complete | Complete | Complete | IDENTIFIED AND DEFINED LIST OF ELEMENTS WITHIN ACCESS AND SUCCESS PROGRAM |
| Simplify and Streamline Advisor Data Management | list of data elements, how do we capture data elements and how do we display those elements | Jenn Taylor | Complete | Complete | Complete | Product completed and in maintenance with Tech Team. No further developments until other needs are identified to create a new initiative |
| Active Directory Infrastructure | Moving IT infrastructure to cloud to deliver real time data solutions | JennTaylor/Andres | On-Track | On-Track | On-Track | The Common Drive cutover occurs next week and all prep has been completed for it. Communications have gone out via the Development standing meetings, Program standing meetings, and the local operations teams, and we have helped anybody with specific data (like finance and HR) move or plan their move already. Andres is moving the data for people to minimize the impact.This should wrap up in mid March as planned |
| Automated Messaging and Virtual Advising- Decision Making | full-org implementation of texting systems for both automated messaging/reminders and virtual advising | Melissa | On-Track | On-Track | On-Track | We have signed an agreement with AdmitHub.  We have recruited 6 advisors as early adopters, so we will be initially piloting with those advisors' caseloads in our core program (approximately 500 students). This will allow us to compare outcomes for the early adopters versus everybody else and move into this project with a strong understanding of what we can expect in terms of outcomes. We are also working on recruiting recent Access Only grads and will roll that pilot out when the advisor is hired. |
| Early Warning Systems and Student Pathways | Predictive modeling consulting to produce initial version of the Early Warning System (EWS) / Pathway Mapping | Jenn Taylor | On-Track | At Risk | At Risk | We have struggled to find diversity in firms offering machine learning services, so our timeline is getting tight. Reaching out to organizations this week to request bids or efforts put forth on pieces of the project, so we can get moving on analysis while minimizing risk of putting all of the efforts into a single firm. .It is also unlikely that we can find a firm that excels in the analysis and the technology integration, as they are different skillsets. So we are focusing on the analysis first and will assess the integrations as we see what comes of the first projects. |
| Core KPIs | Focus program model (and advisor time) on degree and affordability, and only absolutely core Employability and Life KPIs – all other important aspect delivered by partners orgs or mentors | Sarah |  |  |  | NO UPDATE |
| Employability and Life Partnerships | Find partners for Employablility and Life KPIs | Sarah |  |  |  | NO UPDATE |
| Build Internal and External Advisor Training/Practicum Program | Build internal and external (advisor) training / practicum program with tools (aligned to our internal advisor pathway) that ends with a BL credential and possibly a certificate/credits from a partner HE institution | Steve/Sarah/     SheCara | On-Track | At Risk | At Risk | Resource are at risk because operating with internal resources. Still identifying other external resources. |
| Indirect Training and Credentialing Program | Indirect training and credentialing program delivered primarily through memberships or affiliation orgs – e.g., NCCEP, DCAN, MCAN, NCAN, ASCA, HE Systems, etc. | Steve/Sarah | On-Track | At Risk | On-Track | Schedule is off because existing grant with GRad NYC training requires three trainings. We are just beginning the second and n to identify third partner. We have received funding from Kresge to partner with NCEEP. |

**FY 21 Org Wide Strategy Dashboard**