

WELCOME!.....	1
General Institute Notes:.....	2
How to get the most of the National Programming and Resources:.....	3
How to get the most out of Team Time:.....	3
How to get the most out of Coaching Time:.....	4
Structuring Team Time:.....	5
Monday Day 1 - “Goals and Design”	5
Part 1: Goal Setting (~1 hour).....	5
Part 2: Mapping out the Institute (~1 hour).....	5
Part 3: Design Questions to Drive your Work (~1 hour).....	5
Tuesday Day 2 - “Shape and Share”	6
Sign up for a Campus Plan Feedback Session.....	6
Part 4: Shaping your work into a plan (~2 hours).....	6
Part 5: Prepare to Share Out (~1 hour).....	6
Part 6: Sharing out in the Step-Back Consulting Session (~2 hours).....	7
Wednesday Day 3 - “Planning for Action” Day.....	8
Part 7: Incorporating Feedback (~2 hours).....	8
Part 8: Tackling the Project Post-Institute (~2 hours).....	8
After the Institute.....	8
Part 9. Joining the Community of Practice.....	8

WELCOME!

We have built the “Opportunity Institute: Colleges and Universities Working to Improve the Student Academic Experience and Outcomes” as a working institute.

The challenges facing student success in higher education are often structural, and while some are long-standing, others reflect the evolving nature of student populations - their academic preparation and their career goals - in our ever-changing world. Transformational changes that promote positive experiences and success will require sustained, strategic efforts. Planning for these transformational changes is the goal of the Opportunity Institute.

We believe that meaningful change at the institutional level requires different perspectives, expertise, and evidence - both from within your institution and from the larger ecosystem. Thus, the Opportunity Institute is a gathering of teams, representing varied constituencies from within your institution, embedded in the programming and community representing our national scope.

Getting the most out of the institute to advance your team’s work will require strategic planning over the three-day period. We offer this brief guide as one path forward.

General Institute Notes:

The Flow of the Institute (color coding matches the colors on the Institute Schedule)

- **Team time:** We've allocated 11 hours over the three days for your team to tackle the project and do the strategic work that you are coming to the institute to accomplish. Be sure to check out the appropriate schedule for your time zone. Further guidelines on how you might make the best use of team time are below on pp. 5-8.
- **National programming and resources**
 - **Provocations:** We've invited in three notable individuals whose leadership in higher education seeks to get us to think in new ways. They will be offering short talks followed by ample time for conversation around their provocative ideas.
 - **Panels and Workshops:** These are opportunities to learn from experts. The panels have been pre-recorded and are available on our YouTube channel (<https://www.youtube.com/@opportunityinstitute2024>). The workshops are held during one band each day featuring three choices. All are interactive. And all will be recorded and uploaded to the YouTube channel after the Institute.
 - **Office Hours:** Many of the panelists - and a few bonus individuals - will be available during Office Hours for 30 minutes each day. This is your opportunity to ask them questions about the panel - or more generally about their expertise. You can just drop in to Office Hours - Zoom links will be provided on Sched.
 - **Coaches:** A cohort of national expert practitioners is available for Zoom consulting with your team during Team Time. You'll need to sign up to meet with a Coach. We encourage you to do so daily! Further guidelines are below on p.4.
- **Step-back Consulting:** On Tuesday at the midpoint of the Institute, we'll gather in small groups (3-4 teams) to share our work and receive feedback from coaches and peers. Further guidelines are below on p.7.

Community Norms

To foster unity and establish a professional, fair, and cooperative community, we provide norms and guidelines for the institute; these encourage everyone to be relentlessly welcoming, respectfully inclusive, and avidly participatory. Please read our full document [here](#).

Zoom

We will use Zoom for all programming. Each session has its own link provided on Sched.

- Please update your name in Zoom to include your Institution.
- If you are going to be viewing the sessions in a larger gathering, make sure that you have a way of contributing to the Chat or being near a microphone to ask questions.

Media Permission

All sessions at the Institute will be recorded. By joining each session, you agree to be part of a live-streaming event. If you wish to not have your image or name visible in public recordings, turn your camera off and remove your name from your Zoom profile.

Publicity & Social Media

We want to ensure that the hard work of the 2024 Opportunity Institute can be seen by the many stakeholders for this work on our campuses and in the broader ecosystem. We're using the hashtag **#OpportunityInstitute2024** for social media.

How to get the most of the National Programming and Resources:

It's up to your team to decide if you want to stick together or divide and conquer for the Workshops and Office Hours. Remember that everything will be recorded and available post-institute this summer for re-watching and/or sharing. Also be sure to read our more detailed notes on meetings with Coaches (p. 4) and Step-Back Consulting (p. 7).

How to get the most out of Team Time:

Team Time is the dedicated time each day for teams to work on their projects. Your work each day of the institute should be driven by a central theme/focus:

- **Day 1 is the “Goals and Design” day.** Your focus should be on defining/refining your project goals - both the ultimate goal and your goal for productivity during the institute - and tackling the design questions that will drive your work.
- **Day 2 is the “Shape and Share” day.** Your focus should be on advancing your work with an eye toward the step-back consulting sessions in the afternoon. You'll need to be ready to share a tight summary of your project and the 2-3 questions that you want feedback on (see more below on p.7 about the step-back consulting process).
- **Day 3 is the “Planning for Action” day.** Your focus should be on integrating the feedback you have received into your plans and delineating a strategy to take action on your project post-Institute.

More details are provided below on pp.5-8 for scaffolding you might find helpful to shape your team work for each day of the institute.

In addition, at the start of each Team Time, we suggest that you ask two questions:

- *What is an insight we have gained since the previous Team Time?*
- *What are the implications for our project?*

First, take a few minutes of quiet time for each team member to answer the questions individually. Then share your thoughts with one another and discuss how the new thinking might re-shape your work.

How to get the most out of Coaching Time:

Your team will have the chance to sign up for coaching sessions during the designated Team Times. The coach cohort is a dedicated, experienced cohort of coaches and student coaches who offer targeted feedback and support during Team Time sessions. Coaches can provide your team with the guidance needed to effectively achieve your institute goals.

<p>What Opportunity Institute Coaches provide:</p>	<p>What you can bring to your coaching time:</p>
<ul style="list-style-type: none"> ● Active listening ● External perspective to your institution ● Student perspective ● Expertise in given area(s) related to your project ● Suggestions of resources or references to similar projects ● Brainstorm realistic timelines 	<ul style="list-style-type: none"> ● What 1-2 ideas or challenges do you most want feedback on? ● Briefly describe the purpose of your project ● Share an outline or short documentation of your project ● Refer to Team Time Questions for other ideas

How to Sign Up with a Coach:

- View the Coaches section in Sched.
- Once available, within each Coach Bio, you will find the link to sign up for a 45 min meeting during Team Time sessions.
- Select a time that works best for your team.
- You will receive a confirmation message with the Coach’s Zoom link
- You will also receive a reminder message with the Zoom link!

Structuring Team Time:

Monday Day 1 - "Goals and Design"

Part 1: Goal Setting (~1 hour)

Why are you here? Use the first hour to define and refine your project goal(s).

- *Goal-setting:*
 - *What is our project?**
 - *What is the ultimate 'goal' of our project? What will success look like for us?*
 - *What is our team looking to accomplish during the institute?*
- *Team perspectives:*
 - *What perspectives are represented on our team? What spheres of influence do we have? Does our breadth and depth match well with our chosen project?*
 - *Whose voices are we missing?*
 - *Who do we need to join us in this work after the Institute? Who are our allies? From whom do we need buy-in?*

*What does a good team project look like? Many possibilities:

- "Relationship-building" - great for newly convened teams to build trust and set priorities for the challenging work ahead.
- "De-siloing the work" - creating strategies to ensure that every member of a campus unit is ready to do their pieces of the work necessary to enact structural change.
- "Single Project" - the classic project with a discrete problem identified and a focus on how to effect structural change to address it.

Part 2: Mapping out the Institute (~1 hour)

There's a lot happening in the three days of the Institute. Use the second hour of the team time session to be sure you're ready!

- *Institute Itinerary: How will we make the best use of the institute to ...*
 - *... maximize our team's internal productivity?*
 - *... learn from the parallel sessions of workshops and office hours?*
 - *... learn from coaches at the Institute? (Make sure you schedule a consultation!)*
- *Let's look ahead to the expectations for the Tuesday Campus Plan Feedback Session to help us pace and focus our work.*

Part 3: Design Questions to Drive your Work (~1 hour)

- Have you met with a Coach yet today? Sign up now for all three days!
- This work is likely taking place after our first Provocation and round of Workshops. So be sure to take time to ask two questions, first individually, and then as a team:
 - *What is an insight we have gained since the previous Team Time?*
 - *What are the implications for our project?*

OK, time to move on to design thinking that can provide a useful framework your work. We suggest thinking expansively first to welcome all ideas, and only later applying a filter to focus.

- *Air and discard our “smelly fish”. What problems occupy our brain space in a non-productive way?*
 - *Let’s name them, share them, and then set them aside to keep our focus on the problems that we can tackle.*
- *How can we break down our goals into smaller stages and tasks? We have ~8 hours of team work time that we can devote purely to our project.*
 - *What questions do we need to answer?*
 - *How should we prioritize those questions?*
 - *Do we have a system in place to keep us organized with good records, etc?*
- *What do we not yet know enough about our problem to either better define our goals, inform our solutions, or create a workable timeline and action plan?*
 - *Are there resources at the Institute that can help us?*
 - *What evidence/people at our own institution do we need to seek out?*

Tuesday Day 2 - “Shape and Share”

- Sign up for a Campus Plan Feedback Session.**
- Have you met with a Coach yet? Sign up now for today and tomorrow!

Part 4: Shaping your work into a plan (~2 hours)

This is the time to move toward a more complete and shareable version of your plan. Your plan will need to have sufficient structure and flexibility to survive the vicissitudes of the coming year. Coaches will be available today *before* the Feedback Sessions for consultations.

This is time for serious, focused work to advance your project. You know what you need to do.

- *How did our work progress on Day 1? Are we on track? Do we need to revise our goals?*
- *What aspects of our project do we have well-defined?*
- *What still needs our attention?*
- *Where are we running into problems or uncertainties?*

Part 5: Prepare to Share Out (~1 hour)

Prepare for the Step-back Consulting Sessions (see below) at end of day. This should be a 5-minute presentation. Prepare **three slides**:

- 1 slide on what is our project and goal? How do we define success?
- 1 slide on where it fits into campus strategy? What impact will its success have?
- 1 slide on what 1-2 ideas or challenges do we most want feedback on?

Linked here are [Google Slides templates](#).

Part 6: Sharing out in the Step-Back Consulting Session (1.5 hours)

We will use this time for building cross-campus conversations, connections, and constructive feedback opportunities. Each team will have an opportunity to present a draft project plan including issues and challenges they’re grappling with as part of their planning. After this brief presentation, each team will receive feedback and possible solutions to consider. Please watch [this quick video](#) by Bret Eynon on our YouTube channel for a clear explanation of the process.

Logistics

- We will assign 3-4 campus teams to each group.
- Each group will have an Opportunity Institute coach and a Student Coach as facilitators.
- Each round of feedback takes 25 minutes; there will be 3-4 rounds.
- Within each round, one team will present; members of other teams and the Summer Institute coach will act as “consultants” providing feedback and solutions.
- We ask everyone to help us keep to this timing, including a break after 2 rounds.

1	Designated team member presents their plan.	5 minutes
2	Members of other teams “take on” action/strategy question as if it is their own: First, ask clarifying questions only and listen to response.	5 minutes
3	Then members of other teams discuss the focus issue using appropriate language, e.g., “ <i>I think we should ...</i> ” The presenting team “steps back” remains silent, listens, takes notes.	12 minutes
4	Team who presented now comments on what they learned from the conversation.	3 minutes

The success of this process depends upon active and thoughtful contribution from the group members. Going beyond simply asking questions by offering possible strategies and solutions – and doing so as if they were part of the team facing the challenge. The language of “we” is important.

Wednesday Day 3 - “Planning for Action” Day

Do you need to sign up with a Coach yet?

Part 7: Incorporating Feedback (~2 hours)

Hopefully both the act of pulling together your project to share and the feedback from the consulting session gave you a lot to work with. Use the first two hours to further refine your project and work around the challenges.

- *How has our project evolved during the Institute? What contributed to this?*
- *Can we overcome the previously identified challenges?*
- *What new challenges have emerged?*

Part 8: Tackling the Project Post-Institute (~2 hours)

In this last Team Time, you’ll want to focus your attention on how you’ll translate your plans into action post-institute.

- *How can we make the case for our project?*
 - *What do we know that others on our campus don’t know? Who needs to hear this? How can we communicate with them?*
 - *What kind of evidence or arguments will be persuasive to advance our work?*
- *What are the levers of change at our institution?*
 - *Who do we need to bring in to help us advance this work*
 - *Who controls decision-making and resource allocation?*
- *Where are the voices of students in this work?*
- *Do we have a clear plan for action with target dates?*

After the Institute

Part 9. Joining the Community of Practice

Stay tuned for your invitation to join the Community of Practice. No obligation, just opportunity!