

## **Initiative Owner Walk Through**

### **Checklist for Department Designated Staff (Managers, Leads, Subject Matter Experts)**

This checklist is intended to guide department designated staff in leading their assigned strategic initiative from initial understanding through definition of outcomes and Key Performance Indicators (KPIs). It ensures alignment, staff engagement, and clear tracking toward measurable success.

#### **1. Owning your assigned initiative(s)**

- Review the Department Strategic Goals and Initiatives provided by the Executive Team.
- Identify which initiative(s) your team will actively work on or also identify current projects underway, up and coming, or planned, that align with the initiatives.
  - Note: Resources are limited. Identify which initiatives you can support best to result in the biggest impact either operationally in the department, or as an improvement for our customers, or both. This Strategic plan provides clear direction, promotes alignment, and helps us focus our efforts on what matters most to the department.
- Identify partners or cross-division collaboration / processes owned by several divisions. Connect with other divisions to ensure optimal divvying of responsibilities and that work is not being unnecessarily duplicated. Division Managers should maintain a strong focus on the priorities within their own division, while also taking a broader view across the organization to identify opportunities for alignment, collaboration, and shared solutions / initiatives.
  - Note: Cross-divisional partnerships are encouraged and inherently part of the RivCoOne guiding principals.
- Each member from the executive team will be scheduling a kick-off with the Divisions in their purview and can include staff tasked with facilitating Strategic Plan meetings (Strategic Plan Liaison).

#### **2. Preparing to engage your team**

- Review the Strategic Goals and prepare an explanation of the selected initiative(s) purpose and importance.
- You should focus on engaging your entire team in this effort to ensure they understand the vision, feel heard through their feedback, and are invested in the final product
- Brainstorm questions to guide the conversation around:
  - Current State / Future State;
  - Pain points and inefficiencies;
  - Opportunities for improvement (i.e. how to bridge the gap between current/future); and
  - Data or resources already available.

#### **3. Facilitating a Team Conversation**

- Schedule and lead a team discussion or working session to review the Strategic Goals and introduce the selected initiative(s).
- Encourage open feedback on what success would look like from multiple roles.
- Gather input on:
  - Desired outcomes;
  - Barriers to success;

- Existing or needed metrics; and
- Potential process improvements or pilots.

#### **4. Defining the Future State and KPI Structure**

- With the feedback from your team and optional tools from County HR, Lean training, or other methodology, draft a clear vision statement for your project.
- Identify 1–3 measurable outcomes that will reflect progress and success. For project-based initiatives the KPI can focus on project completion. For process changes or service delivery there may be an existing metric to be measured (timelines, customer satisfaction).
  - Consider:
    - What data is available or needs to be tracked?
    - How frequently should data be reviewed?
    - Who will be accountable for updates?

#### **5. Reporting and Refining**

- Submit a draft initiative outline to your Executive Team Member and the Strategic Plan Liaison.
- Prepare your contributions for the 1-day Strategic Planning Retreat.
- Participate in a follow-up working session to refine and finalize the implementation plan.
- Schedule regular progress check-ins (monthly or quarterly) to monitor momentum and report out on progress via the designated Strategic Plan progress process. The Strategic Plan Liaison will set quarterly check-ins to gather information, milestone, progress.