**Purpose:** This tool summarizes the full process to develop and publish recommendations by the task force and provides suggestions for activities to support the process.

**Users:** Facilitator and co-chairs

**Instructions:** Review the objectives and suggested activities to understand the full process. Objectives might be met through a combination of in-person meetings, individual and small group assignments, remote meetings, and email communication. As you plan how you will meet the objectives, use the last column to document your timeline and to capture key ideas.  
**\*Deliverables** are noted in the table for state- or region-level implementation technical assistance in conjunction with support from the Dana Center. Consider the following questions when making the timeline:

* Do you want to introduce the recommendations at a certain event?
* Should you try to coordinate with other initiatives with connections to the math task force?
* What are the best times in the academic calendar to engage people with new ideas?

**Math Task Force Process At-A-Glance**

**Math Task Force Process in Detail**

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| **Objective 1** | Surface concerns and hopes for improvement of undergraduate mathematics. Establish and communicate a charge for the task force. | | |
| **Suggested toolkit resources** | *Setting the Charge*; *Effective Meeting Checklist*; *Math Pathways Resource List; Math Pathways Slide Deck; Effective Strategies and Messaging for Communication and Engagement* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Create a draft charge using the *Setting the Charge* template.  Complete *State Higher Education Context*.  Suggested assignment for members:  Read *Identifying Task Force Members (Part II Only, Roles and Responsibilities)* | Call to action: Mobilize and empower task force members.  Review and finalize the formal charge.  Build a common understanding about the state context and math pathways. Resources: *State Higher Education Context Template, Math Pathways Slide Deck and Math Pathways Resource List*  Share information about related initiatives in your state and how the task force fits in.  Discuss concerns and hopes for the task force.  Discuss a communication plan to build awareness of the task force work. Resources: *Effective Strategies and Messaging for Communication and Engagement*.  Possible homework: Select one key reading from the *Math Pathways Resource List*. Note: If reading is assigned, it should be discussed in the next meeting. | Do all task force members understand the charge and their individual role in both establishing recommendations for math pathways and helping to communicate and champion those recommendations?  Do you have a plan for how information about the math task force will be disseminated across institutions and stakeholder groups? |  |
| **\* Deliverable:** Submit a formal charge to the Dana Center. | | | |

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| **Objective 2** | Define the current problems that math pathways will address. Identify what is known and what additional information is needed to understand the problems and their underlying drivers. | | |
| **Suggested toolkit resources** | *Facilitating Data-Driven Discussions; Effective Meeting Checklist*  For states or regions supported by the Dana Center: *State Context Assignment* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Prepare data for discussion (see *Facilitating Data-Driven Discussions* for suggestions).  Complete State Readiness Assessment and State-Level Data Template and collect other data sources.  Suggested assignment for members:  Do assigned readings from *Math Pathway Resource List*, if applicable. | Review and discuss data to define the problems and identify the evidence of each problem.  Identify additional data needed to fully define the problems.  Discuss how math pathways could be designed to address the problems identified. Start to identify key challenges to implementing math pathways. | Are the problems that need to be addressed clearly identified?  Is there evidence for each problem?  Do the problems and the evidence make a clear case for math pathways to all stakeholders? Is more evidence needed? |  |
| **\* Deliverable:** Write a 2-page brief for an external audience, summarizing the problems and the evidence for the problems. Have the consultant review the brief before submitting it to the Dana Center. Note: You may use this brief immediately to begin making the case for mathematics pathways to faculty, administrators, student support staff and other stakeholders. You may also wish to use it as part of the full document when publishing the task force recommendations. | | | |

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| **Objective 3** | Identify the challenges to implementing math pathways. | | |
| **Suggested toolkit resources** | *Defining the Challenges; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Identify the broad categories of challenges for the working groups based on input from the task force (see *Defining the Challenges* for examples).  Suggested assignment for members:  Consider assigning members to working groups. Individuals can begin to use the *Defining the Challenges* template to prepare for the working group discussion; can also get input from colleagues on the topics. | Ask small working groups to use the *Defining Challenges* template to identify the drivers for key challenges.  Have a full group discussion on key challenges in each category. Identify areas of overlap and connections between categories. Add input from other members.  Vet list of challenges with a small number of representatives of other stakeholder groups and/or critical friends to see if the major challenges have been identified.  Ask working groups to finalize a list of challenges for their topic. | Do all task force members have confidence that major challenges have been identified?  Has input from representatives of other stakeholder groups or external critical friends been considered?  **External communications check: Have all task force members shared information about the process within their institutions?** |  |

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| **Objective 4** | Brainstorm solutions to address the identified challenges. | | |
| **Suggested toolkit resources** | *Linking Challenges and Solutions; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Ensure that working groups have finalized the list of challenges.  Suggested assignment for members:  Begin thinking about solutions to the challenges and gathering input from colleagues. | Ask small working groups to use the *Linking Challenges and Solutions* template to brainstorm solutions for each challenge.  Have a full group discussion on key elements in each category. Identify areas of overlap and connections between challenges and categories. Add input from other members.  Ask working groups to finalize a list of proposed solutions for their topic. | Have solutions been identified for each challenge?  Do all members have a general understanding of the proposed solutions, including advantages and disadvantages of each? |  |

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| **Objective 5** | Prioritize solutions. | | |
| **Suggested toolkit resources** | *Prioritizing Solutions; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Collect the lists of proposed solutions from the working groups and distribute to the task force.  Prepare for the prioritization process (see the *Prioritizing Solutions* tool for suggestions).  Suggested assignment for members:  Review the proposed solutions for all categories. | Discuss proposed solutions focused on clarification or lingering questions.  Create a process that allows all members to give equal input on prioritizing solutions.  Identify the solutions that will be included in the official task force recommendations.  Vet solutions with a small number of representatives of other stakeholder groups and/or critical friends.  Ask working groups to finalize recommendations on solutions. | Will the solutions address the identified challenges and collectively address the original problems identified in Objective 2?  Was there a high level of consensus in the prioritization process? Are there any items that need further discussion?  Has input from representatives of other stakeholder groups or external critical friends been considered? |  |
| **\* Deliverable:** Submit solutions to the consultant and the Dana Center for review. | | | |

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| **Objective 6** | Draft recommendations. | | |
| **Suggested toolkit resources** | *Drafting Recommendations; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs:  Collect and share feedback from any external reviewers, including the consultant and the Dana Center staff if support services are being provided.  Suggested assignment for members:  Review feedback and discuss as necessary. | Ask working groups to draft recommendations, using the *Drafting Recommendations* template.  Have all task force members review the recommendations. | Do the recommendations cover the priorities identified in Objective 5?  Are there overlaps or connections that should be noted or addressed? |  |
| **\* Deliverable:** Submit the proposed recommendations to the consultant for review. | | | |

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| **Objective 7** | Formally vet recommendations. | | |
| **Suggested toolkit resources** | *Planning the Vetting Process; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Identify options for vetting recommendations to present to the task force (see *Planning for Vetting Process* for suggestions). | Create a plan for formally vetting the recommendations with key stakeholder groups.  Prepare for the vetting process, (e.g., presentations, talking points, etc.), as applicable.  Determine if recommendations need any revision based on feedback from the vetting process.  Ask working groups to revise recommendations as necessary. | Was the case for math pathways convincing and effective?  Was there a high level of support for the recommendations among stakeholders? Did any major issues or concerns arise that require further research or discussion? |  |

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| **Objective 8** | Write and publish the recommendations. | | |
| **Suggested toolkit resources** | *Publishing and Disseminating Recommendations; Effective Meeting Checklist* | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Draft an outline and timeline for the writing process (see the *Publishing and Disseminating Recommendations* toolfor suggestions).  Suggested assignment for members:  Review the outline. | Finalize the outline for the recommendations.  Assign responsibilities for writing and reviewing the full document.  Finalize the timeline for the process.  Create a plan for dissemination. | Has the document been approved by the full task force?  If applicable, has the document been reviewed by the consultant and Dana Center staff? |  |
| **\* Deliverable:** Submit the full report on task force recommendations to the consultant and Dana Center for review prior to publication. The facilitator and co-chairs will finalize the report based on the feedback. | | | |

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| **Objective 9** | Disseminate and champion the recommendations. | | |
| **Suggested toolkit resources** |  | | |
| **Preparation** | **Suggested Activities and Resources** | **Progress Check: Are you ready to move on?** | **Timeline and Notes** |
| Facilitator and co-chairs: Organize and coordinate the plan for dissemination.  Suggested assignment for members:  Prepare for their individual role in the dissemination plan. | Carry out the plan for dissemination of task force recommendations. | Phase 1 ends with the publication of the recommendations. The task force will then pivot to Phase 2, creating policy and practice conditions for statewide or region-wide implementation. |  |