

Event Record

Summary

Event ID: 6923
Client System: CH-P&R
Event Name: 07-CHPR - LMS Assistance Charter
Event Description: 07.0 - Team Formation & Culture Development
Priority: 3 - Routine
Opened: 4/23/2009
Event Date(s): 4/24/2009 through 4/24/2009
Time: 1:00:00 PM until 2:00:00 PM
Hours: 1.
Hours from notes: 0
Location: Client Organization
Closed? False

Financials

Invoice Amount: \$0.00
Reimbursable Expense(s): \$0.00
Non-reimbursable Expense(s): \$25.00

Team

Lead: Lacroix, Joseph
Anchor: Lacroix, Elizabeth
In-Room Support/POC: N/A
Team Sponsor: Wilson, James

Attendance

Expected Attendance: 1
Invited: 1
Actual Attendance: 1

LMS Information

LMS Information - MUST DO: (No Data)
LMS Information - PROTECTED: (No Data)
LMS Information - PUBLISHABLE RESULTS: (No Data)

Printing, Publications, and Logistics

PRE/POST Requirements:

Logistics:

A - Normal Event Package - 01 to 09

Models Used: (No Data)

Handouts Used: (No Data)

Film Used: (No Data)

Photography/Recording Completed: (No Date)

Tech Manuals Used: None

Event Plan

Data Foundation

(No Data)

Event Lineage

Parent Event(s):

EventID: 6714 CHPR-RGB Strategic Realignment 9/9/2008 - 7/31/2009

Concurrent Event(s):

EventID: 6338 RES I - 1-08 1/15/2008 - 1/17/2008
EventID: 6342 RES II, 1-08 2/11/2008 - 2/15/2008
EventID: 6822 00 - Initial Meeting with Pand R 9/9/2008 - 9/9/2008
EventID: 6823 00-CHPR - Initial Meeting with Leadership Team 9/23/2008 - 9/23/2008
EventID: 6715 01-CHPR - CW Server Installation & Orientation 10/7/2008 - 10/7/2008
EventID: 6747 01-CHPR - Earlyon Decision Meeting w/L-Team 10/9/2008 - 10/9/2008
EventID: 6732 01-1-CHPR - RGB Workshop & Orientation - 1 10/20/2008 - 10/20/2008
EventID: 6733 01-2-CHPR - RGB Workshop & Orientation - 2 10/21/2008 - 10/21/2008
EventID: 6734 01-3-CHPR - RGB Workshop & Orientation - 3 10/21/2008 - 10/21/2008
EventID: 6744 01-5-CHPR - RGB Workshop & Orientation - 5 10/23/2008 - 10/23/2008
EventID: 6743 01-4-CHPR - RGB Workshop & Orientation - 4 10/23/2008 - 10/23/2008
EventID: 6745 02-CHPR - Data Collection Team - 1 10/28/2008 - 10/28/2008
EventID: 6755 01-6-CHPR - RGB Workshop & Orientation Makeup - 6 10/29/2008 - 10/29/2008
EventID: 6746 01 - Tagup 10/30/2008 - 10/30/2008
EventID: 6341 RES I - 4.08 11/4/2008 - 11/6/2008
EventID: 6763 02-CHPR - Data Collection Team - 2 11/13/2008 - 11/13/2008
EventID: 6764 02-CHPR - Data Collection Team - 3 11/18/2008 - 11/18/2008
EventID: 6766 02-CHPR - LMS Transition Workshop 11/19/2008 - 11/19/2008
EventID: 6807 03-CHPR - Survey Distribution, Entry & Validation 12/8/2008 - 12/23/2008
EventID: 6794 03-CHPR - Leadership Team - TAG UP 12/9/2008 - 12/9/2008
EventID: 6811 03-CHPR - Facilitation Team Meeting 12/17/2008 - 12/17/2008
EventID: 6795 03-CHPR - Beliefs Set 12/22/2008 - 12/22/2008
EventID: 6812 Team A - Issue 11 - Written Guidance 1/5/2009 - 1/16/2009
EventID: 6814 Team C - Item 1 - LMS Effectiveness 1/5/2009 - 1/16/2009
EventID: 6815 Team D - Item 3 - Employee Satisfaction 1/5/2009 - 1/16/2009
EventID: 6796 03-CHPR - LMS Problem Solving Teams Start 1/5/2009 - 1/16/2009
EventID: 6813 Team B - Item 5 - Consistent Decisions 1/5/2009 - 1/16/2009
EventID: 6817 04-CHPR - Leadership Team - TAG UP 1/13/2009 - 1/13/2009
EventID: 6818 05 - Data Fair Preparation for Guides 1/23/2009 - 1/23/2009
EventID: 6830 05-CHPR - Data Fair 1 2/3/2009 - 2/3/2009
EventID: 6824 05-CHPR Feedback 2/3/2009 - 2/3/2009
EventID: 6831 05-CHPR - Data Fair 3 (ALL ATTENDANCE) 2/5/2009 - 2/5/2009
EventID: 6825 05-CHPR - Data Fair 2 2/5/2009 - 2/5/2009
EventID: 6829 05-CHPR - Facilitation Team Data Fair Follow Thru 2/10/2009 - 2/10/2009
EventID: 6826 05-CHPR - Leadership Team TAGUP 2/10/2009 - 2/10/2009
EventID: 6892 06-CHPR - Coaching Lab and Planning Session 3/24/2009 - 3/24/2009
EventID: 6893 06-CHPR - Follow-through Planning Meetings 3/24/2009 - 3/27/2009
EventID: 6896 07-CHPR - Workforce Baseline Team Meetings 3/30/2009 - 4/10/2009
EventID: 6894 06-CHPR - Initial Team Orientation Meetings 3/30/2009 - 4/3/2009
EventID: 6887 06-CHPR - Leadership Team Tagup 3/31/2009 - 3/31/2009
EventID: 6895 07-CHPR - Workforce Baseline Team Formations 4/9/2009 - 4/10/2009
EventID: 6922 07- CHPR - Facilitation Team Meeting 4/13/2009 - 4/13/2009
EventID: 6897 07-CHPR - LMS Team Recommendation Presentations 4/20/2009 - 4/24/2009
EventID: 6888 07-CHPR - Leadership Team Tagup 4/28/2009 - 4/28/2009
EventID: 6898 08-CHPR - Team Meetings 5/4/2009 - 5/15/2009
EventID: 6899 08-CHPR - LMS Implementations 5/4/2009 - 5/29/2009

EventID: 6889 08-CHPR - Leadership Team Tagup 5/19/2009 - 5/19/2009
EventID: 6900 09-CHPR - Workforce Baseline Team Recommendations 6/8/2009 - 6/19/2009
EventID: 6901 09-CHPR - First LMS Metric Cycle Begins 6/8/2009 - 6/19/2009
EventID: 6890 09-CHPR - Leadership Team Tagup 6/30/2009 - 6/30/2009
EventID: 6902 10-CHPR - Evaluation Roll-up 7/13/2009 - 7/24/2009
EventID: 6891 10-CHPR - Leadership Team Tagup 7/28/2009 - 7/28/2009

Needed Event(s):

(No Data)

Design Information

Design/Agenda - OMR:

OUTCOMES

Clarify a shift to assistance to the LMT/LMS
Increase confidence in progress

METHODS/AGENDA

Check-in

Offer of Assistance to LMT/LMS,

J&E - Beginning immediately, QWLC will respond to non-decision-making requests for assistance in helping with the behind-the-scenes implementation of accepted Team Recommendations.

Jim - Will implement early in May.

Exposure to Models System - ICO, OMR(1 and 2),

J&E - LMT/LMS needs exposure to same models as the Facilitation Team.

Jim - Good, do it!

Exposure to candid comments from Front-line Change Agents (Facilitators)

J&E - This an ideal place to come for candid information.

Jim - Invite me to Facilitator meetings, I'll show up when I can.

Sponsorship Minimums - Sample List of "Potential Sponsor Involvement Options"

J&E - Attached at the "Notes" is initial DRAFT, want to clarify if needed.

Jim - OK to use in at next Tag-up (may have comment)

Participation Range (Minimum - Maximum per month)

Recommend for Facilitators: 2 hour min - 8 hour max (not discussed)

Recommend for Team Member: 2 hour min - 4 hour max

J&E - Consider and be prepared to publish some criteria.

Jim - reasonable, will do.

Common "Literature" as a foundation for action (available in CapacityWare Software)

J&E - provided "Good to Great" extracts to prompt dialog among LMT/LMS
Jim - looks good will review and considers using it.

Behavior Guidelines during "10 Stage Strategic Realignment Activity"

J&E - Beliefs Set topic for next Tag-up,

Work Regimen on Team Tasks, Strategy this Fall

J&E - QWLC to finalize 1st Beliefs Set and make ready to
lamine and distribute - May

Jim - OK with guidelines on what LMT/LMS are to do with it.

Information Letter to All Personnel - Status of Progress

J&E - 90-day update on happenings (last was January Executive Summary)

Jim - Look to May to make it happen.

Interim on-line and publishable Calendar

J&E - As P&R perfects an accessible calendar for all, QWLC will continue to
provide interim calendar at the CHART. GEMS a partial "prize" of
Acer Computer to users as incentive.

Jim - OK.

RESOURCES

Time: 1 hour

Materials: ROI Report, Sponsorship DRAFT Tasks, Good to Great Extracts.

Design/Agenda - Clinic - Went Well:

Jist of meeting timely.

Agreement with all suggestions.

Design/Agenda - Clinic - Needs Improvement:

None

Transcribed Charts

See the notes within the agenda.

Participant Comments:

Participant Comments Score: 0

Technology Suggestions:

Release 10-Stage references at each Stage to unify approach.

Best Practice Documentation:

Closed: (No Data)

Notes

Date: 4/24/2009 3:15:39 PM

Name: Lacroix, Joseph

Note:

Sponsorship Tasks (DRAFT)

Sponsors ought to accept the role, if requested, when the task is outside their normal decision-making purview.

By agreeing to serve as a sponsor the following tasks are available to the organization:

1. Before the first meeting, sponsors ought to review the research available on the topic/issue assigned to keep informed of potential trends. Much of the research can be accessed through CapacityWare Software. Also, review the results of the Coaching Lab and Planning Session, paying particular attention to the issue before this Team.
2. Meet with the Facilitation Team Lead and/or Team Anchor to craft a "Team Charter". The Lead is responsible for the initial draft of this document. Sign off or recommend changes until you can sign off. This ought to be a negotiated document that sets the scope and parameters of the Team activities. Ask for a meeting with QWLC if additional clarity is wanted.
3. Attend the first half of the initial Team Meeting and introduce the Facilitation Team and Topic.
4. Let everyone know the importance of this effort and of your availability, when needed; but that you intend not to interfere with their treatment of the issue before them.
5. Let the Team know the general amount of their time and effort expected (Monthly minimum and maximum). Discuss this commitment with the supervisors of those assigned to the team so that the "chain-of-command knows what the organization commitment is and is not (leave plenty of wiggle room for unknown contingencies that will arise).
6. Encourage Team Members to keep their supervisors informed.
7. Relate to the Team the results of the Coaching Lab and Planning Session priorities.
8. Tell the Team that this was an initial effort and they need not be entirely bound by the initial effort except by general direction as indicated by the issue before them.
9. Check in at the beginning of subsequent meetings but do not linger - just let the team know you are interested and supporting them.
10. Meet with the Facilitation Team as needed to get a sense of progress and to help find solutions to problems that impede progress.

11. Play a role as if you were the decision-making authority as recommendations are formed and prior to their finalization. Help the Team make the best presentation possible.
12. When the Team is ready for the recommendations briefing, set the schedule and provide brief introductory remarks as a lead in.
13. When the recommendation have been accepted, meet one last time with the Team, thank them for their service, and answer any questions that might be posed.
14. Help the Facilitation Team learn from the experience. What did they do well and what might they improve in their next effort.
15. If there is follow-on activity, help to bring the issue to closure. Take every opportunity to let the workforce know what happened and what might be the next steps.
16. Insist that the Facilitation Team keep the CapacityWare Software Event Record up to date and review the Record before and after each Team Meeting to keep yourself informed of current activity.