

Event Record

Summary

Event ID: 6890
Client System: CH-P&R
Event Name: 09-CHPR - Leadership Team Tagup
Event Description: 09.0 - Implementation & Measurement
Priority: 3 - Routine
Opened: 6/30/2009
Event Date(s): 6/30/2009 through 6/30/2009
Time: 10:00:00 AM until 11:00:00 PM
Hours: 1.0
Hours from notes: 0
Location: Client Organization
Closed? False

Financials

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

Team

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

Attendance

Expected Attendance: 7
Invited: 7
Actual Attendance: 6

LMS Information

LMS Information - MUST DO: (No Data)

LMS Information - PROTECTED: (No Data)

LMS Information - PUBLISHABLE RESULTS:

This meeting marked a turning point in the exchange of FRESH information about sentiment that many are discouraged because change has not been forthcoming. We need to be straightforward about this sentiment in our workforce communications and be more overt about what is happening.

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: 6/30/2009

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-CHPR - RGB Workshop & Orientation - 3 10/21/2008 - 10/21/2008
EventID: 6743 01-4-CHPR - RGB Workshop & Orientation - 4 10/23/2008 - 10/23/2008
EventID: 6744 01-5-CHPR - RGB Workshop & Orientation - 5 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-CHPR - Leadership Team TAG UP 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: 6796 03-CHPR - LMS Problem Solving Teams Start 1/5/2009 - 1/16/2009
EventID: 6814 Team C - Item 1 - LMS Effectiveness 1/5/2009 - 1/16/2009
EventID: 6812 Team A - Issue 11 - Written Guidance 1/5/2009 - 1/16/2009
EventID: 6815 Team D - Item 3 - Employee Satisfaction 1/5/2009 - 1/16/2009
EventID: 6813 Team B - Item 5 - Consistent Decisions 1/5/2009 - 1/16/2009
EventID: 6816 Team E - Item 4 - Accurate and Timely Information 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 - Data 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: 6893 06-CHPR - Follow-through Planning Meetings 3/24/2009 - 3/27/2009
EventID: 6892 06-CHPR - Coaching Lab and Planning Session 3/24/2009 - 3/24/2009
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: 6923 07-CHPR - LMS Assistance Charter 4/24/2009 - 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: 6926 08-CHPR - Data Collection Team Meeting - Metrics 5/5/2009 - 5/5/2009

EventID: 6927 08-CHPR - Meeting with Elke Mitchell 5/13/2009 - 5/13/2009
EventID: 6929 08-CHPR - Facilitation Team Meeting 5/14/2009 - 5/14/2009
EventID: 6889 08-CHPR - Leadership Team Tagup 5/19/2009 - 5/19/2009
EventID: 6901 09-CHPR - First LMS Metric Cycle Begins 6/8/2009 - 6/19/2009
EventID: 6900 09-CHPR - Workforce Baseline Team Recommendations 6/8/2009 - 6/19/2009
EventID: 6930 09-CHPR - Meeting with Jim Wilson 7/2/2009 - 7/2/2009
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

Confidence in activities and recommendations

METHODS/AGENDA

Checkin

Elke - Facilitation Team Report (See Charts)

Joe and Elizabeth - RGB Update (See Handout)

RESOURCES

Facilitation Team Charts

DRAFT - RGB Update

Design/Agenda - Clinic - Went Well: (No Data)

Design/Agenda - Clinic - Needs Improvement: (No Data)

Transcribed Charts

Transcribed Notes (taken by Elizabeth)

6/30/08 P&R Tag Up City Hall - 10am

Attended by: Jim Wilson, Donn Levenworth, Winnie Lorenzon, LaVon Marrow, Chris Hickman, Elke Mitchell

Elke presentation - discussion: Facilitators are discouraged! "Lack of" / "no" communication about Art leaving proves nothing has been changed. 'Why don't I know about it before you tell me?'

Jim announced the Art news at 4 different gatherings.

Jim wanted to know how many people - Elke responded 1 or 2.

Facilitators notes:

- * Need positive changes to be seen
- * Implementation - evidence that progress has been made.
- * Didn't expect process to be handed back to them.
- * Need to clarify team sponsor role.
- * Instead of new teams - facilitators need to rally around "old" teams to move forward.

Jim - wanted the Reward team to make a presentation to all managers to build ownership (same/similar presentation that was given to LMT). Only information was handed out at the manager team .

Team Sponsorship role - Identified. When facilitators ask manager to be sponsor they need to give them the handout to help explain the role they are to play. (If LaVon becomes a liaison to fac team - she might "coach" sponsors in their role.)

Re this afternoon meeting:

Jim wants to continue the 5 programs and show progress - will address this afternoon.

Break up areas of responsibility - not all will be happy. Policy + administration - will take at least a month to implement.

All need to work in their area.

Performance plan- force people to do jobs in a different way.

Jim does not like surprises say 1 thing to Jim and something else to others.

Chris: they need to accept and buy-in.

LaVon - underlying issues - Band-Aid on bigger problems - regroup and come out strong in fall with successes.

Joe: There is intimidation and harassment there are people who do not want things to get better. Some in the culture want this initiative to fail.

Huddle: It is not about [dentistry or P&R] about organization problems. Currently no mechanism to get important information out.

Staff on the pedestal of normal and need to be knocked off to give them something to talk about and to get involved.

Leads: 3 don't want to lead (Jan, Erin, Marie) LaVon too strong an influence - due to her position in the organizations.

Winnie: as a sponsor said come to me if you need - now realizes that a sponsor cannot assume everything is OK if they don't hear anything or no one steps up. Need to show up for the first 10 minutes on a regular basis -be available to answer questions - show interest and support - then leave and let the team do their work.

Organization is 39% Red need to play to their needs.

RGB Update - names position titles.

RGB Participation records. Transcripts given to Jim. LaVon reviewed and gave corrections/deletions.

Joe will sent out reminder about RGB Update this afternoon.

Jim will meet with FACs to make progress and encourage the team. (Winnie and Chris may attend as well).

Joes notes (following are placeholders):

- In response to how difficult it is to facilitate a "charged" group - people need to learn a new way of participation.
- Reminder of FAC Lead rotation in October 2009.
- Voiced concern that Buckroe has three facilitators at one location - can be difficult to schedule.
- Passed R-eady, G-et set, B-e Informed (RGBI) to Jim as an option for morning coffee meetings at twice monthly for 15 to 30 minutes to see how it goes.
- Use CW to track RGBI's.
- Who can ya trust for the truth - J&E and Facilitation Team after third visit.
- NOW is the time to focus on the Management end of L&M - folks need more direction/being told.
- One of our jobs is to check with Stealth on facilitators for the purpose of learning and maintaining standards.
- Finished Cycle-1 today for all practical purposes.
- Cycle-1 - Freedom to learn - observe - get ready for tough issues that may follow.
- Meet with those who are not in step (turned over complete set of transcripts to Jim). Organization didn't even meet mandatory session (said we would do makeup session if necessary).
- Ekle and LaVon cleansed the lists of some seasonal WAEs.
- Have corresponded w/FAC TEAM 5 times w/o answers from them. Facilitators need to model what we want the rest of the organization to do - not there yet.
- Facilitators need to do examinations.

- Can't do it all JIM! Enlist front line soldiers you think you can trust and check on them. Remember they have prozones to maintain as well.

Ideas that can to mind (Elizabeths mind - Yea!) - also posted to Best Practice - Technology innovations:

= Open the door for MSF - LMSI

= Cycle-2 Tagups need to include time for direct reports to recap their RGB activities in a round-table.

Participant Comments:

Participant Comments Score: 0

Technology Suggestions:

Ideas that came to mind (Elizabeths mind - Yea!) - also posted to Best Practice - Technology innovations:

= Open the door for MSF - LMSI

= Cycle-2 Tagups need to include time for direct reports to recap their RGB activities in a round-table.

Best Practice Documentation:

Closed: (No Data)

Notes

Date: 3/8/2009 6:50:09 PM

Name: N/A

Note:

Establish/Update Records

Date: 6/30/2009 2:59:24 PM

Name: Lacroix, Joseph

Note:

Cindi:

I wanted to respond to you about your e-mail regarding the Update "message" and the slip in belief.

I'm sending this also to Elke just so she'll know.

I bragged about you. That isn't hard to do. At the Tagup, and as forcefully as possible I said something like, "One of our best facilitators is Cindi Lewis-Brown. She took the time to respond to a difficult e-mail and it was refreshing to have someone tell us something that might have been hard to say but necessary. She will get the job done. I have great confidence in her." Something like that.

You added to the bits of critical information at a time when it was highly needed and useful. Your input at a critical point allowed some dialog to unfold at a pivotal meeting. Combined with the report from Elke it sealed the deal for what we had to drive home. Thank you.

Also, and on a side note - (it almost goes without saying) - your charts are vivid and complete. Your help to Elke a Team Meetings is appreciated by her (may not need to be said) and will be appreciated by those who might otherwise have to struggle and squint at the digitals

Have a great day and keep the faith - this will happen. We are more on schedule than you might realize.

Joe and Elizabeth