

Residency Syllabus

February 2007

1. The training facility (Point Plaza Hotel and Conference Center, Newport News, Virginia) has wireless Internet connectivity that permits the effective use of portable computers during the session. Bring your portable computer if you have one. It is always an advantage to have *CapacityWare*TM installed prior to the Residency. The course blends software use each day to illustrate how the "change system" works in concert with technology.
2. Times indicated on any agenda include breaks. Beverages are available in the room.
3. Start time is 8:30am. The day ends at approximately 4:30pm. Lunch is 1 hour at approximately 11:45am. A restaurant is available at the training site.
4. The Agenda format is a potential topic sequence but is not a rigid one. Topics will be discussed in the order in which participant readiness for the material is judged. The Residency Syllabus - Agenda is tailored to meet the needs of the participants as well as the needs of the *CapacityWare*TM Practitioners International Network.
5. Roles are assigned to participants for each topic as a means of creating empathy. Any role not otherwise recommended is a course participant role.
6. During the sessions, participants are encouraged to write inclusive chart numbers in the last agenda column to aid in finding topics of interest when transcribed charts are made available.
7. References are made to the Client Technology Library which, if not distributed before the course begins, will be distributed during the first morning. All course materials are available on line. Updates to course materials will be posted online as updates are made and announced in "The RGB Way!" - the monthly e-newsletter distributed.
8. Of the fifty online examinations, only 11 must be completed as a result of the Residency within one month for Workshop-level RGB Certification. An observed RGB practicum of two hours duration (template provided) must be completed within six months.
9. A listing in the *CWPIN* web site will be made upon completion of all course requirements.
10. Although the course is flexible enough to permit some "absences" because of pressing organizational needs, we have created a start-on-time and end-on-time culture that we ask all to respect. Absences are best accommodated during the appropriate scheduled breaks. It is expected that participants will be in attendance at least 85% of the scheduled time and make up time absent with a class "buddy" of their own selection.
11. Completion of the Facilitation Teams course is a desirable prerequisite for Residency.
12. A Residency Application is required for attendance. The information on the Application is used to tailor the actual course agenda.

Description - Day 1

1.

Residency Setup

Provide a description of what will happen during Residency.

- **5-Day agenda overview** - Will track a pseudo-client through a change cycle.
- **Confidentiality** - Speak about client conditions in this environment - repeat nothing.
- **Roles** - Defined to develop empathy with teams and client positions.
- **Homework** - Follow-through each day and prepare for the next day.
- **Missed-time makeup** - Participants responsible for their own learning.
- **Facility** - Quick virtual tour of facility.
- **Residency versus on-line** - Explanation of face-to-face versus Internet activity.
- **EDU catalog** - Express the desire to share the current national catalog listing.
- **Signature consistency** - Create the single-image signature to foster client comfort.
- **Library history** - Provide a brief history of the 5-volume client library.
- **Web visits** - Demonstrate the connectivity to Web resources through *CapacityWare*TM.
- **35-year timeline** - Provide planning insights that have impacted the *CWPIN*.
- **Certification versus Licensure** - Explain the differences between the two options.
- **Checkin's - ...out's - and ...up's!** - Explain the "CHECKS" that help develop culture.
- **Social Opportunities** - Offer the option to gather socially one evening.
- **Breaks** - Breaks are expected once each morning and afternoon at minimum.
- **Interact!** - Participants will get out of this event what they put into it - Guaranteed!
- **Types of Residency** - The options are: Content intense, Network Development intense.

(Note: order will be modified to accommodate late arrivals on day 1 only)

2.

Client Set (Illustration) - Typical Client Introduction Elements (Modeled)...

- + **Classical OD** - What kind of consultants are we, and why?
- + **Capacity** - Explain the range from capacity recovery to development.
- + **Tailored Nature of System** - Systemic with Client Tailoring at each stage.
- + **Model Consistency and Connectivity** - All models synchronize for optimum impact.
- + **INSIDE BUSINESS - The RGB Way!** - Community-based literature and client needs.
- + **Photography and Transcribing** - Need to know about reservations in advance.

3.

ProZone - learn a "hard" scientific dimension that creates "soft" organization culture issues. Cover the concepts and practical applications of the **ProZone** Model with its implications on forming and developing organizational culture. Link the concept of "organization capacity" as a central theme with the implications on recovery versus development as being **ProZone** dependent.

4.

CWPIN - learn how this dynamic network supports continuous capacity-based learning. We have formed a network of practitioners bound together by a common technology to add strength and diversity to our offerings. This is a past, present, and future description of the network that you are "joining" through this Certification and Licensure process.

<p>5. The Facilitation Team - learn why the team approach to facilitation produces reliable results. Define the roles and composition of the facilitation team and how members interact to create extraordinary results.</p>
<p>6. Introductions - learn the latent talents available through this team "interview" process. Get to know something about the people in the room.</p>
<p>Lunch</p>
<p>7. The RGB Workshop Template - learn the essential elements of a standard RGB event. Describe the elements and options of the boilerplate RGB workshop two-hour (plus or minus) design as it is currently approved for those Certified at the Workshop level.</p>
<p>8. Client Professional Library - get to know the resources available for any condition.</p> <ul style="list-style-type: none"> - Organization Change System Manual - <i>CapacityWare</i>TM Administrators Manual - RGB WorkStyle Preference Manual - Facilitation Teams Manual - Diagnostic Report and Follow-through Manual - Internet - extended materials and updates as posted
<p>9. Event Production - learn what it takes to produce a high capacity event for any condition. Be it small or large, this segment thoroughly describes what transpires in a small isolated event and details those differences that take place in long-term complex engagements.</p>
<p>10. Unifying Human Systems - learn how to use the most reliable "any organization" model. The UHS Model is the central "systemic" model used in all interventions to collect data, feed it back to those from whom it was gathered, and begin planning systemic interventions.</p>
<p>11. Staying Out of Content - right after "do no harm" learn the notion behind Ashby's Law. One of the most difficult aspects of facilitation is the absolute requirement to stay out of the content the group is dealing with during their sessions. This short lecturette helps understand WHY and HOW this golden rule is so essential to success.</p>
<p>12. Managing Activity - learn the software tools to manage all activity. Planning, scheduling, implementing, and evaluating planned activity is at the core of any change effort. Too often, these activities are completed by habit, or (in the worst cases) not done sufficiently at all. This software aid assists facilitators by helping manage all activity according to pre-established requirements.</p>
<p>13. International Buyers Service - learn how to find the most effective event support mementos. Gifts and other mementos distributed at events as rewards for "best" behaviors, or as a remembrance of the event play a critical part in extending the life of the event AND help with reentry effectiveness.</p>

14.

Homework - learn why off-site and off-hours study supports the classroom experience. Each day, we'll ask that you review the day's work and references as well as look ahead to tomorrow's references to help prepare you for sessions that are more effective. Rather than take home all library binders, select one or two of the most important. If, as a participant, you miss any portion of the Residency, you are expected to identify an individual in the class who will cover the material you miss. Make note of the Chart Number of the last chart created before you depart, and the first chart being created as you return. It is a participant responsibility to get up to speed on these topics.

Description - Day 2

15.

Checkin - learn how to continuously recover and develop organization cultural capacity. Checkin's are an opportunity for anyone to ask a question of any kind, make a statement to get a reaction, have spin-off conversation about anything pertaining to the learning focus of the event. Although 30 minutes are normally allocated, the Checkin time may end up being the highest investment of the day!

16.

Adult Learning Model - come to understand the "hidden" rationale for powerful event designs. How adults learn and how they apply what they have learned is important to the design and facilitation of events. Since there is a natural flow that best achieves results, taking advantage of that natural design advances almost any group process.

17.

Basic Graphics - learn the minimum essential graphic facilitation techniques. Some fundamentals of Graphic Facilitation will be demonstrated. Participants are expected to apply these fundamentals in all future chart work they encounter during the balance of Residency - and beyond. These fundamentals are part of the *QWLC - CWPIN* signature.

18.

Facilitation Essentials - learn the minimum essential facilitation techniques for success. There are several essentials that facilitators need to become "expert" at - Setup, Full Participation, and Tasking are at the top of the list. This short review session helps embed these essentials.

19.

RGB - Interpersonal Dynamics - learn what to expect as RGB predispositions collide. Everyone has engaged in the simple RGB Individual Profile workshop. However, some basics require attention when you shift to interpersonal dynamics. Participants will learn the most important dyadic implications of RGB predispositions.

Lunch

20.

SPOONS, SPOONS² and 99! - learn the experiential essentials to surface difficult topics. Participants must have an understanding of GAMES that help make difficult points. Three GAMES will be used to dramatize how "playful" and serious dialog can come together to make a profound difference for RGB workshop participants.

<p>21. OMR² - learn to plan and implement plans that achieve desired results. This simple, yet profound cornerstone model is both diagnostic and prescriptive. It holds the cornerstone place among the <i>CapacityWare</i>TM planning models as the primary integration model with the RGB technology.</p>
<p>22. Practicum Scenario - learn to create a pseudo organization as a backdrop for learning. A Facilitation Team will be selected and a scenario presented describing the parameters of an event. Those not on the Facilitation Team will be asked to play specific "roles" in this facilitated event. The results of this facilitation will be used for the remainder of the Residency as a backdrop for all other exercises.</p>
<p>23. Creating Instruments - learn how to create a data collection instrument to find critical issues. Data Collection (Group Interview) instrumentation will be designed and created using <i>CapacityWare</i>TM.</p>
<p>24. Group Interview - experience a group data collection interview and learn "do's and don'ts." A Facilitation Team will be selected to conduct a group interview, the results of which will be used to fine-tune other data collected and provide a crosscheck on resulting trends.</p>
<p>25. Checkout - end the day with a checkout that may help adjust topics to group needs. At the end of a day (or similar period), the idea is to collect information from the participants that will enable an improvement in subsequent sessions.</p>
<p>Description - Day 3</p>
<p>Checkin - learn how to shift dialog into a deeper level of importance to meet organization needs. Surface questions and comments related to a previous, current, or subsequent session.</p>
<p>26. Respondent Data - learn how to keep track of the organization population with whom you work. <i>CapacityWare</i>TM software registers individual records for anyone who will attend an event or participate in a data collection effort. The Respondent Data files contain dozens of fields that are used for a wide range of things that include helping to stay in touch through e-mail and identifying demographics that help sort data collection results.</p>
<p>27. Nested Outcomes - learn the organization developer's default outcomes for all conditions. Regardless of the project or client outcomes established, practitioners must keep in mind and work toward a set of outcomes established for our network and our profession. These outcomes, if practiced in common, will serve to unite those who are working in different parts of the same organization.</p>
<p>28. Item Generation - learn how to select and create effective survey items. Instrument (normally survey) Item generation involves both selection from a pool of items and the potential creation of specific items that may not be contained in any item pool. This section explains both the selection process and survey item creation criteria.</p>

29.

Prioritizing - learn how to create a sharp focus that gets the right things done right.

When a group is used to select and create items, it is often the case that more items are generated than are practical to adopt in the final survey. Under the best of circumstances, a group process will be used to narrow the list of potential items that will be used. Using a group process to select survey items will help prevent suspicion. This lecturette and exercise illustrate this activity.

30.

Make Instrument - learn how to create a survey to collect needed data for decision-making.

There is a three-part process that results in instrument creation: selection and/or creation of items, editing to tailor the items, and development of the heading that includes the demographic options. These processes will be demonstrated during this session.

31.

ICO - learn how to design events and initiatives to optimize organizational effectiveness.

The maturation of any group process follows a specific sequence directly related to RGB. This session will detail the work of Will Schutz and show a direct connection to RGB technology that will help drive groups to maturity faster and with greater yield from group activity.

Lunch

32.

Examination Demonstration - learn how to get on-line and take required examinations.

The two-parts to Certification are Residency and the satisfactory completion of on-line examinations. This demonstration will allow users to complete an examination as they learn the process.

33.

Graphic Icons - learn graphic techniques to improve participant retention of materials.

During this session, participants will share their favorite graphic "icons" with a walk-around exercise.

34.

ICO - Implications of RGB Deficiency - Dyadic Task - learn to diagnose ineffective groups.

In groups, participants create a list of potential implications of RGB deficiencies on the dynamics of group maturity and then brief out results.

35.

Data Collection - INPUT - learn to input the results of completed surveys.

Participants will complete the data collection instrumentation and input it.

36.

RGB - Matching Tasks with Talent - experience the results of mismatched job design.

Participants will be required to make their own list of the top ten tasks required of them on their current job. These "input" documents will be swapped with others who will RGB type the tasks and engage in a brief coaching session.

37.

Select Best Practices to Link - learn to research and identify best practices to solve problems.

There are already hundreds of Best Practices (partial and fully completed) that users can link to selected survey items. This exercise enables participants to link survey items with practical solutions to trends surfaced during data collection.

Checkout - end the day with a checkout that may help adjust to group needs.

Generate feedback that will modify the next day.

Description - Day 4
<p>Checkin - learn how to shift dialog into a deeper level of importance to meet organization needs. Resolve issues and answer questions that impact learning.</p>
<p>38. Organization Change System - learn a universal system to change an organization's capacity. The OCS is a generic program management system that results in deliberate organizational change. It can be adapted to any specific project desired and easily modified to accommodate specific special requirements. The sequence of stages within the system also makes it easy to use several stages or single stages collectively without harm to the entire 10-stages.</p>
<p>39. Run Reports - learn to identify information needs and generate reports to satisfy those needs. Reports are designed for both on-screen display and paper-based production. This segment addresses the unique features that allow a user to isolate specific reporting requirements and provides a demonstration of the more popular report productions. Reports will be produced as a result of the Residency ongoing pseudo-client exercise.</p>
<p>40. Decide Report Configuration - learn to select reporting options from available templates. The Diagnostic Report and Follow-through Manual provides the options that can be included in boilerplate paper-based reports to clients. Users are encouraged to use these options to satisfy the needs of those for whom reports are created. These options are not intended to be limiting. A separate "book" will be shown in its current configuration for Multi-source Feedback reports (the MSF Report Option will be included in the library when finalized at Manual 5).</p>
Lunch
<p>41. Workforce Banding and Smart Tailoring - learn to develop "strategy sets" to respond to diverse workforce needs for both recovery and development initiatives. The concept of workforce banding and the subsequent practice of tailoring interventions for specific bands results in a targeted return-on-investment and the potential leverage of effort.</p>
<p>42. Systemic Leverage Points - learn to identify leverage points with a high return-on-investment. An examination of the UHS Model illustrates that there are selected descriptive points at which prescriptive actions can be programmed that have a better chance of dramatically impacting culture in a positive way.</p>
<p>43. Creating the Best Practice Synopsis - learn to create specific plans to fix detected problems. Long before a data collection effort is "released" to the workforce for response in survey form, practitioners begin the process of creating actions that can be taken to improve organization capacity in the event specific items return scores that indicate action is warranted. This segment covers the creation of Best Practice Synopses that would potentially be engaged in the remediation of trouble areas.</p>
<p>44. Matching Tasks with Talent - Task - learn from an actual MTT coaching session. In an earlier exercise, participants completed an RGB Matching Tasks with Talent Worksheet. During this Segment, an assigned "coach" will use that source document to type the tasks and complete the worksheet. A final step will be the entry of the results into <i>CapacityWare</i>[™] so that a MTT product can be generated.</p>

<p>Checkout - collect a list of final lingering questions to be answered. Collect feedback that will influence Day 5. Ask participants to bring a 6-foot piece of string or comparable material for use in an exercise.</p>
<p>Description - Day 5</p>
<p>Checkin Clear up any questions or concerns.</p>
<p>45. Basic Model - learn to diagnose and plan for the population progression toward improvement. Create a Basic Model into which all participants place "Life Cards" as a means of examining organization realities and explaining potential barriers to progress to a more desirable future. Lessons learned here are used to help design long-term interventions in complex organizations.</p>
<p>46. Organization Realignment - learn to identify and fix weaknesses in any organization. The final model presented in Residency is the Organization Realignment Model - titled to illustrate that every adjustment to an organization alignment structure must consider the systemic impact it will have on all other alignment elements.</p>
<p>47. CapacityWare™ Statistics - 101 - learn to identify and use already available statistical analyses. CapacityWare™ collects data to be used in decision-making. It is imperative that users have confidence in the results of statistical calculations. This segment itemizes the statistical capabilities of the software and illustrates how specific products can be used to improve the quality of decision-making.</p>
<p>Lunch</p>
<p>48. RGB - Model Connectivity - learn to intentionally develop team structures to achieve success. This final walk-around exercise will help participants link RGB-related models to intervention requirements. The results of this exercise allow participants to develop their natural abilities to help their organizations through change efforts and identify suitable adjunct change agents.</p>
<p>49. Sidetracked Item Resolution - learn through experience the resolution of dangling concerns. Throughout the Residency, numerous questions or concerns normally arise that are best addressed and resolved toward the end of the 5-days.</p>
<p>50. Review - learn to effectively conduct a review of complex materials presented over five days. A fast-paced review will be conducted to tie together all the important elements of Residency and address any final questions before graduation.</p>
<p>51. Certification Requirements and Privileges - learn specific privileges of CWPIN membership. Clarify the non-Residency requirements for Certification as well as the privileges extended those who meet final requirements.</p>
<p>52. Graduation - learn final techniques that build ownership among participants. Individual photos will be taken of graduates, as well as a group picture. Graduates are invited to submit a paragraph for the CWPIN web site attesting to their credentials.</p>