

Tailoring the Instrument and Best Practice Approach

A. Overview.

This guidance augments the Organization Change System, Tabs 1 through 4, with assistance for specific programs where the general guidance is not sufficient. This is the process used to tailor the *CapacityWare*TM system to the needs of a specific domain user.

EXAMPLES:

Ablen Consulting - to the specific needs of the Federal EEO Community.

McKercher and Associates - to the specific needs of school safety.

QWLC - to the specific needs of the national School Leadership Development program.

B. Respondent Opportunities.

Clarify the parameters of individuals who will complete specific instrumentation. Include population, frequency, cycle, and other information that will assist in adapting instrumentation to each group.

EXAMPLES:

Project Manager as to daily/hourly/minute-by-minute project status.

Potential buyer as a self-assessment to determine next steps.

Workforce members as internal experts on annual organizational surveys.

Department members as quarterly feedback for the leader/manager/supervisor in charge.

Investigator collecting information for an annual status report.

C. Ten Category UHS List.

Normally, the default categories of the UHS are not universally sufficient for special needs. It is highly desirable, however, that as many default categories as possible be used as long as they are well aligned with the intent and general scope of the default.

EXAMPLES of the Default UHS Categories and Potential Tailored Categories:

Default Categories

Environment
Leadership and Management
People
Skills
Organizations
Alignment
Technology
Information
Facilities
Equipment

Tailored Categories

Neighborhood
Centers-of-Influence
Students
Know-how
Affiliations
Group Philosophy
Typical Actions and Activities
Communications Avenues
Known Hangouts
Paraphernalia

D. Item Creation.

Ample guidance is already contained in the basic material to address specific needs: Positive statements, simple construction, short statements, respondable in degrees of agreement using the 0 to 9 scale.

EXAMPLES:

A management directive has been distributed that clearly delineates program authority.
Students carry items that are intended to intimidate others while at school.

E. Defined Scenario.

A scenario is defined by two elements: a descriptive statement and the degree to which it is true. In combination these two elements permit the user to craft an appropriately proportional response. The initial response is most likely a synopsis of potential action and further development to specifically apply in a given situation. In *CapacityWare*TM the descriptive statement is typically in the form of a well-structured instrument item. The degree to which that statement is true is judged by one or more respondents and permits sufficient understanding to craft the initial Action Plan Synopsis.

F. Research Source(s).

Identify one or more research sources that can be used as credible sources for each instrument item at three varying levels of agreement.

EXAMPLES:

From Good to Great!, by Jim Collins - Contemporary management practices book.
EEO Management Directive 715 - issued by the US Equal Employment Opportunity Commission
Executive Order 12699 - outlines federal intentions regarding response to disasters.

G. Developing Best Practices.

Based on regulatory mandates or prudent follow-through to a defined scenario the user develops a best practice "set" in three distinct parts:

1. Extract. An "extract" is an attributed quote lifted from a credible source having a direct bearing on a defined scenario.
2. Root Organization Development Perspective. The perspective, the second element of the Best Practice, sheds light on the "extract" as it will pertain to remediation in classical organization development terms.
3. Action Plan Synopsis. The short synopsis provides guidance as to potential remediation. It is not meant to be a fully-developed comprehensive OMR (see Book 4, Facilitation Teams, Tab 2) action plan. It is meant to provide the seed of an idea that can be

expanded by the user into an appropriate response considering a myriad of other influences (RGB composite of those who must implement the plan, timing, the culture of the organization, the return-on-investment in the initiative, etc.).

EXAMPLE:

Element/ Score/Day/ Book	Extract	Root Classical Organization Development Perspective	Action Plan Synopsis
ES / 6* / Leadership Engine, The, By Noel M. Tichy, Harper Business, Copyright 1997	Times are changing, and the organizations that thrive in the future will be the ones that change with them. And in order to do this, they must have leaders who will relentlessly search for reality and demonstrate the courage to act.	Everyone seems to trust that "change is inevitable." We often note that people sign up for change as long as it is convenient, or impacts others. One reality suggests that no one is immune from change in some way. The natural tendency is for people to try to influence change so that it is least disruptive to themselves with little regard to the impact of that resistance on the systems they are embedded within. The wise know that they can change most effectively with comprehensive and accurate information about the entire systems that are impacted by the change. The courageous know that they too are a part of the problem and a part of the solution as well. FIND OUT! has long been a battle cry of the courageous. No matter the individual hurt or pain that might be created, we must find out as close to the truth of a condition as possible if we are to make systemic improvements a reality.	Collect information about the "problems" in a systemic way so that solutions can be gauged against the whole condition as it exists. The <i>QWLC</i> Approach engages a "systemic" model system for this purpose - the Unifying Human Systems (UHS) Model. Each element of the Model impacts all other elements. Understanding likely implications of potential actions is at the root of systemic success. Select the lowest scoring survey item for the demographic group that you are in and develop alternative actions to correct the adverse condition. Engage with a Team of people who have a stake in your success. Follow Team guidance available.

*Note that the "set" is defined by the score of "6" in the formation of a specific response.

H. Creating Best Practice Links to Specific Data Points.

There are three ways to link the potential remediation set to a source condition:

1. Link to a Specific Instrument Item. Access to a specific course of action becomes easier to engage when the specific item link option is made.
2. Link to the Appropriate UHS Category. The UHS Categories form strategic initiatives when a preponderance of items contained in that Category return low scores. When this

happens, it is appropriate to link to the UHS Category (perhaps in addition to the individual instrument items).

3. Link to the "Best Chance of Success RGB Category." When the individual or organizational element has a track history of non-compliance, it is highly desirable to link remediation with the RGB profile of the individual who will take authoritative action to correct conditions, or with the group expected to take corrective action.

Summary

Tailoring the remediative features of *CapacityWare*[™] to the unique requirements of a narrowly defined domain adds incredible flexibility to a system already highly tuned to being easily adapted. Adapting the general guidance in the system to the concrete conditions that exist is always available and works well. Tailoring to the specific domain adds additional resources to be applied to very narrow conditions that do not apply generally.

For example, in the "legal professional" domain added tailoring resources may be necessary to cover critical conditions that apply in that professional and no other.