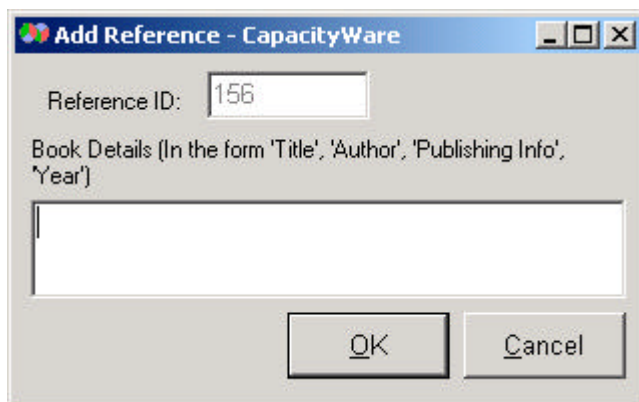


## Engaging Best Practices

**A. Overview.** Identifying and engaging Best Practices is an integral part of the *CapacityWare*<sup>TM</sup> Organization Change System. The Best Practice literature may come from outside the organization, or it may come from within. Whatever the source, *CapacityWare*<sup>TM</sup> provides the means to link a Best Practice set of circumstances to a current condition in the organization that could benefit from it. There are five ways that Best Practices are engaged in the client organization:

- ? By reading and talking about a Best Practice that has general application.
- ? By linking appropriate Best Practice extracts to specific data collection results.
- ? By incorporating Best Practice literature into Event and/or Initiative design.
- ? By incorporating Best Practices into related training initiatives.
- ? By developing specific "if this condition than that response" into tailoring efforts.

**B. Adding (and Editing) Sources.** When Best Practice ideas are located, the source must be entered into the Best Practice module so that appropriate attributions can be made. In some cases, these will be external documents; in other cases, the document may be internally generated. Those who will use the materials may want to know the source and be able to contact/research that source for additional information when and if desired. From the Main Menu "click" Edit, then select Sources, then "click" Add Source. The following illustration will present itself.



**Figure 1.**

**1. Reference ID.** The software assigns the next available source identifier to the reference you are about to add.

**2. Reference Text Window.** Type the source material text into the window provided for this purpose.

**3. OK.** When complete, "click" OK.

**4. Cancel.** This action may be cancelled at any time prior to completion by "clicking" Cancel.

**C. Adding Best Practice Extracts.** The following screen presents itself from the Main Menu by "clicking" Best Practice, then Add Practice. This screen restores itself and "remembers" selected heading fields at every Add so that multiple extracts can be included. The only minimum fields are the Quote or Extract field, and the Reference. Other fields can be completed later. The important concept to remember is that "capturing" the vital information allows the Best Practice to be utilized at some future time.

The screenshot shows a software dialog box titled "Add Quote - CapacityWare". The interface includes the following elements:

- Element:** A dropdown menu with a blue background.
- ItemID:** A text input field.
- Element Score:** A text input field.
- Day:** A dropdown menu.
- Page #:** A text input field.
- Ref:** A dropdown menu.
- Quote:** A large text area with a vertical scrollbar.
- Perspective:** A large text area with a vertical scrollbar.
- Action:** A large text area with a vertical scrollbar.
- Buttons:** "Add" and "Cancel" buttons at the bottom right.

**Figure 2.**

**1. Element.** The "Element" pull down window allows the user to select the most appropriate UHS category from among those available simply by "clicking." The potential categories are:

**AC** - Equipment

**AS** - Alignment - individual fit in the vision.

**ES** - Environment

**IN** - Information Flow

**PE** - People

**LA** - Facilities

**OR** - Organization Structure

**LM** - Leadership and Management

**TE** - Technology (written guidance)

**SK** - Skills

**2. Item ID.** If the Best Practice is to be linked to a survey item, the Item ID is completed with the last four numbers from the Categorized Item Identifier (for example, "AC0127" would have the category "Equipment" in the Element window. The number 0127 would then be entered in the Item ID window by placing the cursor in the window and typing "0127." This action will enable The Best Practice to be viewed in relationship with that item when used on any survey.

**3. Element Score.** Survey Respondents give each item on a survey a score ranging from 0 to 9. Results for an individual or a group are averaged for each element. If the average score for an Element is, for example, 5.5, the Best Practice can be tied directly to that score by entering a "5.5" in the Element Score field. Place the cursor into the field and type "5.5."

**4. Day.** The system will present the user with Best Practice Extracts every day, if desired. The source of these extracts is linked from the "Day" pull down menu. Select a day by "clicking" on any number from 1 to 31.

**5. Page Number.** When the quote or extract is taken from a larger work, the page number of the reference is entered in this field so that the user can, if desired, go to the full text to do further research.

**6. Reference.** The Reference is taken directly from the "Source" entries made in paragraph "B" above. This is a mandatory field so that the quote or extract will be linked to the work from which it came and appropriate attributes can always be made.

**7. Quote or Extract.** Using the blank window, type or paste the Best Practice quote or extract into the window.

**8. Perspective.** A "Root-Perspective" narrative may be added now or later. The perspective tailors the implications of the quote or extract to the specifics of both the *CapacityWare*<sup>TM</sup> Organization Change System and the clients that will be using the Best Practice. As a practical matter, the Best Practice options can be different for a school division than for a manufacturing plant.

**9. Action.** This field carries a recommended action - something that the user can actually DO to make an improvement based on both the Quote or extract and the perspective. Actions that are selected may be available for inclusion into a remediation plan and can be easily "transferred" to the Event Record for specific management.

**10. Add.** When complete, "click" Add to finish this screen and go on to another.

**11. Cancel.** When finished with additions, "click" Cancel to return to the Main Menu.

### D. Searching for and Editing Best Practice Extracts. Th

e main Best Practice screen is accessed from the Main Menu by "clicking" Best Practice, and Edit or Search Practice. The following illustration is returned to the user with all fields blank. The most important function of this screen is performing the search by engaging several optional filters.

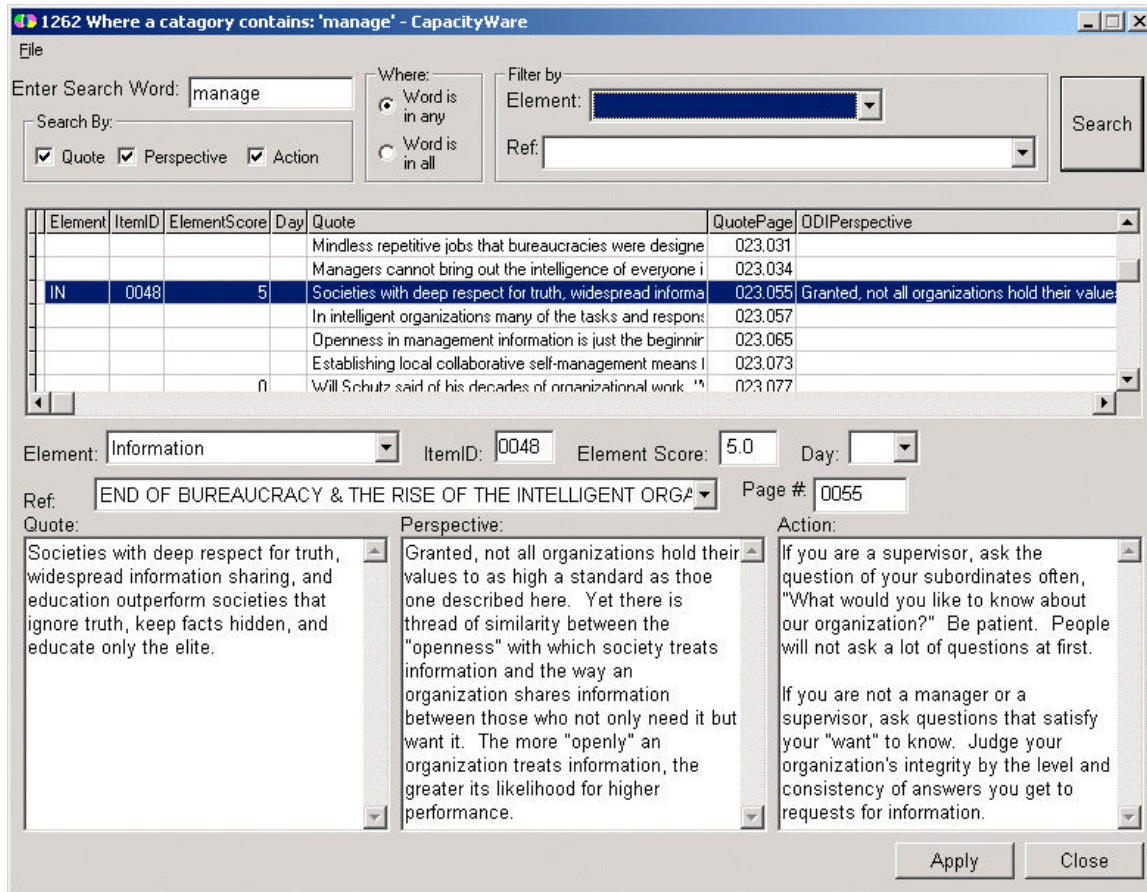


Figure 3.

**1. File.** This pull down window allows the user to print the results of a search, or copy the results of a selection to a clipboard. Pasting from the clipboard may be done in any MS Windows document. A specific paste can also be accomplished within the Best Practice module of the Event Record (see Tab 7).

**2. Search Filters.** Five potential search filters can be engaged singularly or in combination by the user.

**a. Enter Search Word.** The most common search function is to let the system find a word or words that are embedded in the text. Type the search string and "click" the Search Action Button or hit Enter. That will be return to the user a list in the Selection Window below the search function. The top bar will confirm the search string and the number of records found that met the search string criteria.

**b. Search By.** The default "check marks" automatically tell the program to search all three options, but the user may "unclick" those not desired before "clicking" Search or hitting Enter.

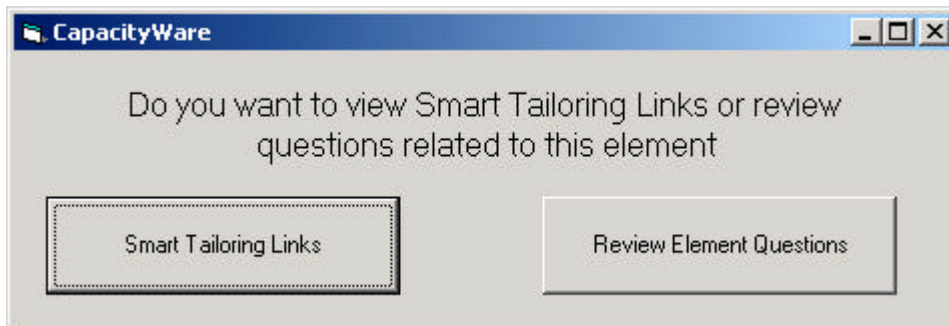
**c. Where [Options - any or all].** This allows the user the prerogative to provide the program further search options.

**d. Filter by - Element.** The user may also search by Element using the pull down menu.

**e. Filter by - Reference.** The user may also confine the search to a specific source by using the pull down menu and selecting the appropriate reference. This option comes in particularly handy when the organization uses a specific text as required universal reading by all employees or by management groups.

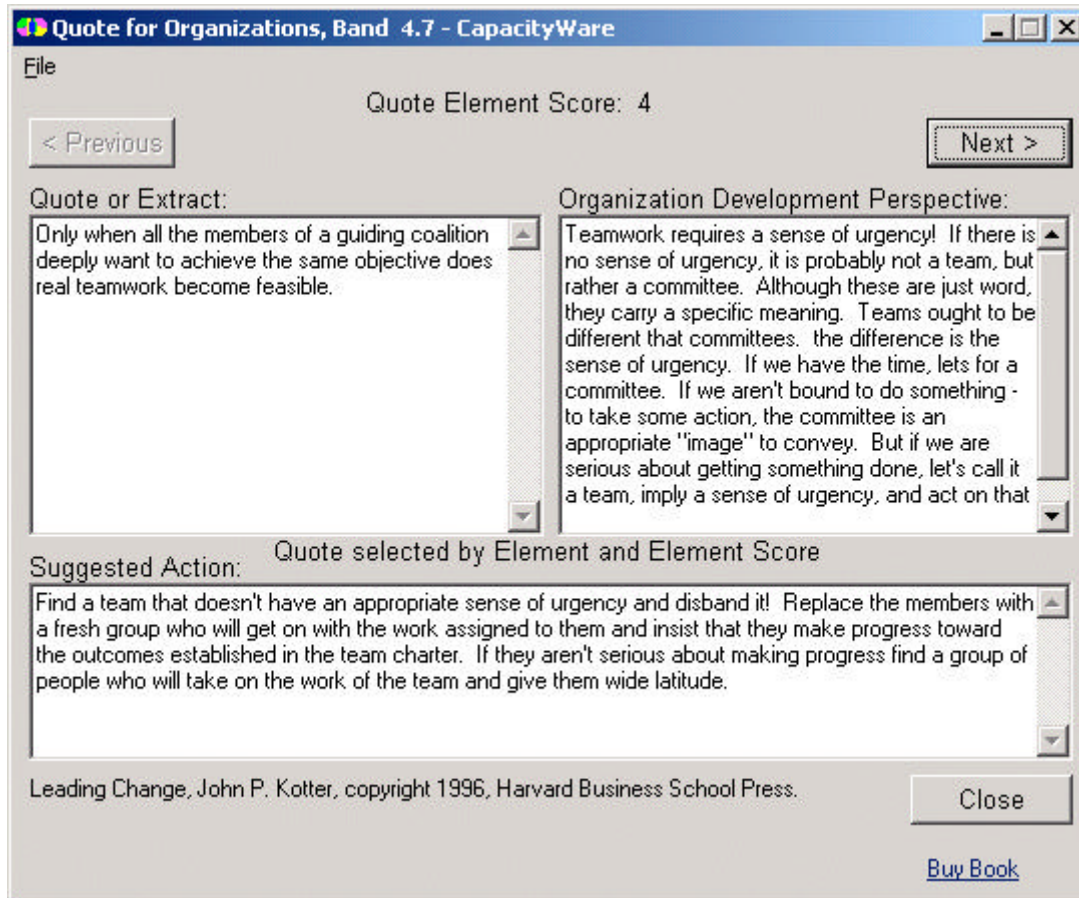
**3. Quote or Extract Selection Window.** By "clicking" on any single record (line) in the Selection window, the user can view all elements that have been completed for that record. This selection also allows the user access to the File drop down menu to take advantage of additional options.

**E. Accessing Best Practice Suggestions.** When displaying the UHS graphic (see Tab 6), the user may show access Best Practice suggestions that pertain to specific Elements at specific score levels (Black Mean or Red Lines). Simply "hover" over the UHS Element label and "click." The following option screen becomes visible. Select the Smart Tailoring Links Action Button. The next screen is illustrated in the following Paragraph.



**Figure 5.**

**F. Using Best Practices as a Method of Capacity Development and Recovery.** The following screen is returned when the user requests a Best Practice from either the UHS Element (described above), or from the Bar chart, or Pie Chart windows under the Best Practice pull down menu.



**Figure 6.**

**1. File.** The File pull down menu allows the user to perform several valuable functions: print, create an Event Record, and put the information on a clipboard for later use.

**2. Quote Element Score.** The number referenced in this field links to the potential score returned on either the UHS Element, the Bar Chart or Pie Chart depending upon the linkages installed.

**3. Previous or Next.** If more than one Best Practice record is available, these Action Buttons will allow the user to scroll to different options.

**4. Three Viewing Windows.** All narrative available is displayed in the available windows.

**5. Close.** This Action Button closes this screen.

**6. Buy Book.** If the user desired to purchase the publication and it is available through Amazon.com, the Buy Book option will take the user to that location so that a purchase can be made directly.

**G. Summary.** Engaging Best Practice literature provides a new dimension to the *CapacityWare*<sup>TM</sup> Organization Change System. By linking appropriate Best Practices with survey results and potential activity, the system become a "smart" package that helps the user design remediative strategies and actions to suit the specific individual needs of the client. Keep the following in mind as you work with the Best Practice features.

**1. Keep Best Practices Relevant to the Organization's Needs.** When selecting Best Practice literature, be sure that it will be suitable for the client organization. Most Best Practice literature will be suitable if the client members are in a learning mode. In some cases, institutional "boxes" have generated a filter that some use to discount learning opportunities. Be aware that although industry relevant literature may meet less resistance, it may also be just what is needed.

**2. Assure Best Practice Links to Low-scoring Survey Items.** Make sure that users always have Best Practice links that can be used during Coaching sessions with first-line supervisors and managers. Start developing links as soon as the survey is finalized and shift attention to those items that score low quickly. If real change is warranted, the "How to..." make it happen will be appreciated and likely used more readily.

**3. Engage Best Practice Literature as a Supplement to Organizational Learning.** Use the Best Practice search capabilities to keep a fresh crop of change management literature in the forefront of all Events. Posts extracts on bulletin boards and include relevant quotes and extracts in routine communications.