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Event Production

Attachments:

Extended Materials on the Web at www.LTODI.com:

Event Production

A. Pre-event Planning.

Event planning incorporates all phases of identifying resources needed to complete the event successfully, especially the selection of the Event Lead. Once identified, the Event Lead will fill other team requirements, lead the design effort, and team role identification. This phase may last a few hours or several weeks depending upon the significance of the event.

1. Weekly/Periodic Calendar Review. At our weekly Staff Meeting or Staff Event, final calendar changes for the foreseeable future are discussed and input to the calendar system. A new calendar is printed and displayed in the conference room. A weekly calendar may also be generated so that individual consultant time can be easily determined. A weekly calendar may also be generated for the web-site associate pages so that part-time consulting and support personnel can stay abreast of weekly activities. Dates for significant events that affect the annual calendar are also posted to the web-site annual calendar on a regular basis. Normally, ***StreamLearning*** and semi-annual retreat dates are determined annually and posted at the beginning of the year. Changes to annual event items are rare once dates have been published.

a. Generate and Review Latest Calendar. One Platform representative is responsible for maintaining the organization calendar. All organizational scheduling will be posted to this single calendar as Events become known (to include tentative dates and times). As significant Events are posted, the calendar is shared in the most expeditious way. This may include display in a public area or web posting.

1. Submit known calendar items.
2. Generate new calendar.
3. Distribute new calendar.
4. Review new calendar.
5. Correct calendar.

b. Conduct Staff Meetings and Staff Events Regularly. Each major organizational element must gather on a reasonably frequent basis. It is recommended that weekly staff meetings be brief and that monthly or quarterly meetings are a greater length.

1. Staff Meeting - weekly.
2. Staff Event – monthly (normally 3rd Monday, or Quarterly).

2. Event Folder/Files Creation. Event folders are created sufficiently in advance that materials can be inserted into the folders as Event preparations are completed. In some cases, Event Teams may not be identified initially, but be assigned close to the event itself. Whenever possible client/team continuity will be maintained and files remain in the custody of the Client Team. Customarily, the Event Team Lead will be assigned by the Senior Consultant and the remaining team members will be selected by the Team Lead.

a. Create Event Folder. An Event Folder is created (by labeling and positioning in the filing system) when the Event it represents has been solidified. Any initial documentation from a marketing effort, for example, is included in the initial file. As soon as practical, the Event Lead will establish the Event Record in ***CapacityWare™*** and assure that an initial copy is posted to the Event Folder. As the Event production evolves, documentation will be added to the Event Folder as a means of having a "one stop" information resource. When possible and feasible, e-documentation will also be posted to the Event Record.

b. Complete Entry on Event Log. When circumstances warrant (normally if the Event is part of a series of Events in the same client organization), the Client File will include (at the first tab) an Event Log. The Event in question can be posted to this Event Log as soon as practical.

c. Fill Event Folder with Standard Items. When standard checklists are appropriate for the Event Design, those checklists can be immediately completed and placed in the Event Folder.

d. Complete Known Information. As information becomes available that will impact the success of the Event, that information will be posted to the Event Record and Event Folder.

3. Event Team Identification and Formation. The formation of event teams takes into account the needs of the client organization. We place a high value on projecting team diversity striving (at a minimum) to project gender diversity in role assignments and perception. As specific events emerge through the calendaring processes, individuals may request assignment. Assignment may be based on client/lead continuity, or based on a team member's need to learn specific intervention technology. The Senior Consultant will be the final authority in identifying and assigning the event lead and client Point-of-Contact. The event lead will be the final authority in determining the rest of the event team and interacting with the Client Point-of-Contact. The event team may include both part time and full time personnel, but normally the event lead is a full time consultant.

a. Event Lead Availability Analysis. The Senior Consultant will assign the Event Lead with consideration to the following criteria.

1. Match Credentials with Client Need.
2. Check Calendars.
3. Dialog with Team Members.
4. Commitment to the Event Design.

b. Event Lead Determines the Team Composition. The first priority for the newly assigned Team Lead is the selection and preparation of the Event Team. The Team Lead will consider the following initially.

1. Create and Use the RGB ***ProZone*** Effectiveness Index to Optimize Selections.
2. Select Team Members from among those available.
3. Commit funding as needed.
4. Update event folder.
5. Schedule pre-event planning meeting.

6. Plan facilities with client and platform representative.

4. Conduct Pre-event Planning. The Event Lead is accountable for event planning. Under normal conditions, the Event Lead will engage the on-site Event Team plus the platform representative in the planning process. Additional planners will include anyone in the organization having a vital contribution to make. Where the expenditure of above normal funding is likely, someone from the business platform may also be required to participate. Planning will be scheduled sufficiently early to allow time for pre-event production to occur without undo stress on the team. The level of Event difficulty will also factor into the timing of the pre-event planning.

a. Identification of Theme. Clients normally have a symptom in mind that will aid in the selection or creation of a theme for the intervention. Although the theme may be anything practical and recognizable, ***QWLC*** has developed a relatively short list of potential themes that will fit most conditions (see Theme Development and Integration, page 5, paragraph 4, of the Organization Change System Manual). The theme is important at the outset because it provides a context for the intervention that often includes outcomes, methods, and resources that can be used to begin planning.

b. Revisit Lessons Learned from Previous Similar Event(s) Design(s). As part of the required research, the Event Lead will review Lessons Learned from Previous Events with the same or similar designs. This review is especially helpful if other client organizations within the same industry/domain have used the same or similar design. It might also be beneficial if other Team Members are provided copies of the research results and if they have experience with the client, industry/domain, or design.

c. Create and Consider the Participant Profile (RGB, UHS and others). Formulate a participant profile from among any information available. In the event information is unavailable, it will be appropriate to meet with a client representative and get as much information as possible about the participant group.

d. Review the Event Design within Progressive Design Configuration. A Progressive Design Configuration contains many potential Event Designs that are normally completed on a specific timeline and in specific order with between-session work to be completed (i.e. Cultural Realignment Progressive Design Configuration). If the Event in question is a part of any Progressive Design Configuration, it must be planned so assure it fits within the overall design context.

e. Create or modify the Event Design (Event Plan). In most cases, a skeleton Event Design is available for application in this Technology. Every Event is likely to take on a life of its own once it is underway, however. Adjustments while underway is a unique freedom that does not extend to the planning process. If adjustments are made as part of the pre-event plan, than they ought to be carefully considered rather than serendipitous. Only adjustments that support the outcomes established for an Event should be adopted.

1. Determine outcomes.
2. Revise the Event Design as needed.

f. Identify, Review, and Modify as Necessary Handout Materials. Handouts must be current, carefully reproduced, and distributed for maximum impact.

g. Select or Create Experiential Activities. Most Event Designs have at least one experiential activity embedded within the design (this is especially true of Progressive Design Configurations). If alternative activities are needed, those certified (or extremely confident in a proven activity) will make the adjustments needed. The most desirable alternative is to correspond with ***QWLC*** via phone or e-mail and explain the situation that demands an alternative. ***QWLC*** has been able to suggest alternatives within 24 hours of all events when requested. Some alternative activity designs are already available on the LTODI.com Internet address.

h. Identify Materials (from Technology and elsewhere) Needed. In many cases, alternative materials are available from a variety of sources. Without copyright abuse, Event Teams have the freedom to use additional materials that will support client outcomes as advance readings, handouts, or post-event deliverables.

i. Identify Awards and Recognitions (what, why). The awards and recognitions initiatives taken at Events range from the formal to the ultra informal. The informal initiatives are designed to provide participants with meaningful immediate memento feedback for some level of unique participation that will help us model for all other participants the good behavior expected at our Events and during their normal working hours. The most typical on-the-spot recognition is the award of a "gem" as an acknowledgement that the recipient has done something unique to help the group reach a higher level of understanding.

j. Consider Basic Load (Logistics) Variations. Most Event Designs have a specific logistics support that enable the Event Team to be successful given the design selected. The Event Team should be familiar with the basic load and prepared to modify it to enhance success.

1. Review Pre-event Checklist in Event Folder.
2. Review Event “Load List” Checklist.
3. Review media needs.
    a. Select Music.
    b. Prepare Music List Handout.

k. Identify Special Needs. Identifying and filling special needs is a thoughtful, collaborative, and careful process that culminates in out-of-the-ordinary support to achieve a client WOW. At least one example of this can be easily visualized with the use of "Picture Boards" that tell the story of long-term interventions. These Boards are not expected, but they delight participants to see the progress and remember the good times they have had over months and years.

l. Identify Special Physical, Food, and Beverage Needs. These considerations range from accommodating blind or other physically challenged participants to ensuring that menus (if used) accommodate special food and beverage. Few things are as impressive as satisfying unique needs or wants unexpectedly.

m. Identify and Accommodate Static Displays and Theme Decorations. Whenever possible, configure the facility to provide on-the-wall stimulation to participants - especially during breaks. The idea is to create the mindset of innovation and perpetuate it for the entire Event by having visually appealing things to look at and absorb.

n. Determine Room Setup Requirements. There are many potential arrangements for tables and chairs. The room arrangement must be planned to optimize the client outcomes the Event is trying to achieve.

1. Identify room setup.
2. Provide copy to client liaison.
3. Put copy in Event Folder.

o. Determine Team Tasking. The Event Lead will assign tasks based on willingness and availability for those Team Members associated with the Event in question. The ***CapacityWare™*** Pre- and POST Event Activity screen is the ideal place to record these assignments.

1. Agenda pieces and materials.
2. Roles Clarity for Team Members.
3. Intermediate jobs – 7 workdays in advance.
4. Learning goals for each team member.

p. Update Event Folder. As new information becomes available or clarity is achieved, the Event Folder and Event Record are updated and potentially distributed to those having an interest.

q. Team Meeting - Confirmation, Commitment, Closure (slap the table). A final meeting of the Event Team will result in every member and extended member knowing what needs to be accomplished and committed to "making it happen."

5. Client Preparation Exchange. Once planning has been completed, and if appropriate, the client or client representative can be informed to assure a seamless Event. In some cases, the client may also be actively included in the Event planning.

a. Identify Client Information. The client will normally want to know the Event Design but not need or want to know all the specifics. The level of detail will often depend upon the clients RGB Profile. Normally it is inadvisable to brief the client on the specifics of experiential activity, as they may not derive full benefit if too prepared. If you expect the client to open a session, guide him or her through the comments you would like them to make and obtain permission to be THE Lead on all Event decisions based on the readiness of the group to follow.

1. Point-of-Contact
2. Dates
3. Location

4. Participants.
5. OMR

b. Provide Information to Client. Meet with the client to "trade" information about the Event. Provide needed information to the client and make certain that you, as the Event Lead will have all the information you need to achieve success.

1. Arrange meeting if necessary.
2. E-mail or phone.

c. Update Website. To the extent that the client has a C.H.A.R.T. being maintained by your organization, assure that it is updated and remains accurate. If other web resources have been promised, assure that those resources are working properly.

d. Video and/or Still Permission(s). Identify and resolve any permissions that may be required (Model Releases). Generally, if the images are being filmed as a client only product, there may be no permissions required. If the images result in a broader use, permissions are likely required. See Tab 4, Record Keeping for potential forms to use.

e. Deliverables Clarity. Although some of this work has likely already been completed during the marketing phase, it is a good idea to solidify deliverable expectations prior to the event. If they are not written, make a comprehensive list of the products and services to be included in the event/initiatives along with a timetable for delivery.

6. Finalize the Plan. It is recommended planning be concluded a minimum of three days prior to the Event to allow sufficient time for everyone involved to complete the tasks required for the Event to be successful. Pre-event production may begin before planning is finalized and will end prior to the beginning of the Event.

a. Make any Adjustments Following the Client Meeting. If adjustments are required in the Event Design as a result of the Client Meeting, make the adjustments and inform those who will have a need to know immediately. It is always a good idea to inform the Team Members of client meeting results as soon as practical even if no adjustments are required.

b. Document and Distribute Meeting Decisions. Enter significant client meeting results into the Event Record and make distribution if appropriate. Insert any new information into the Event Folder.

B. Pre-event Production.

The focus in this stage is the creation or reproduction of available literature and other aids identified by the Event Design. This may involve one or several members of the Event Team, but always involves an office resource to complete effectively.

1. Materials Update. Event materials (including documentation, handouts, MS PowerPoint™ and video presentations) are identified during the pre-event planning phase. There are standard materials associated with specific Core Events. These must be used, although modifications may be necessary for new client organizations. Other Event materials may be selected from the library of previously produced materials and modified as necessary. There may be occasion to create new material. This would be done by the Team and approved by the Technology Lead. All materials are reviewed with each application to a new client system to assure they remain responsive to client needs. A routine consideration in each review is the feedback received from former iterations of the same or similar use of materials in the same or similar Events. The Event Lead will decide the utility of current materials and act accordingly.

a. Update of Materials. A Standard Technology Set may require modification on a one-time, industry/domain, or revision basis. To expedite this process, users must save the current materials file as-is and create the modification under a new filename.

b. Determine Update of Standard Technology Set. If a Standard Technology Set (not a unique set for a specific client) required update/modification this is best accomplished prior to being used again. Under ideal conditions, the Set will be prominently NOTED so that an attempted next use will be obviously in need of correction if the correction cannot be completed immediately.

2. Materials Production. Once selected, developed, or updated, materials are produced and made ready for the event. The platform representative will assist the team in assigning realistic timelines and production methods and will determine the resources necessary to complete the production in a timely fashion. Materials may be produced in house or reproduced through an outside source (NOT recommended). Materials production will include the preparation of appropriate binders (3-ring, folders, spiral bound, etc.). Under normal conditions, the Event Support Person will take charge of Event materials once they are ready. Routine materials may also be stored at our own Event facility if practical.

a. Design. If the material being updated does NOT fit the current design standards (typeface, type size, margins, etc.) bring the revised materials into conformance at the first subsequent revision. Standard Technology Set design configurations are found as an addendum to the current "Client Library Conventions" behind the cover of each Library volume.

b. Layout. Incorporate the most current visuals (illustrations, figures, etc.) and adjust the size and space alternatives to produce the most appealing presentation of the material.

c. Reproduction. Reproduction must be accomplished in-house by the most expeditious AND best presentation means. Color reproduction must be used if any of the materials are color in original form.

d. Collate. Take extra precautions to assure and check that pagination conforms to page number sequence and that material is placed behind the correct divider tab, if used.

e. Assemble. Assembling materials must conform to current standards - three-ring binders, spiral bound or marketing folder ONLY.

f. Package. Materials must be packaged in a binding that includes the appropriate cover materials. These include properly printed and laminated covers that are consistent with all library conventions.

3. Event Procurement. Nearly every Event will require the procurement of some special and/or routine supplies. These supply items may be taken from pre-purchased stores or procured specifically for an Event. The platform representative will coordinate and direct this effort.

a. Purchase locally. Unless otherwise specified, any Event Team may, without separate authorization, purchase any event-required items or materials up to $35 with assurance of reimbursement.

b. Order for delivery. A preferred method of procurement is to order needed supplies and materials through normal channels in advance of the Event. This will normally assure timely delivery and best cost for best quantity procurement.

4. Data Entry. To the extent, it is known in advance, data will be entered into all appropriate systems, particularly including ***CapacityWare*™** Event and Attendance Records. At Event conclusion, these records will require reconciliation. Accurate and complete data is imperative since it will be used to gauge the successful progress of each intervention strategy. The Platform coordinates, but is not solely responsible for, data entry, financial accounting, and reconciliation of records associated with client Events. The Event Team retains this responsibility.

a. Receive Input Materials. If data is collected prior to an Event for use during the Event, it will be collected in either of two ways: hand-to-hand, or electronically. In either event, the materials will arrive at a location enabling input and processing of the data.

b. Sort. If large amounts of data are received, sorting is preferred. It will save keystrokes during input, for example, to have the same demographics sequenced. If there is a priority for delivery, it only makes sense to prioritize the materials to be input in the same order.

c. Input. Depending upon quantity, the input process may involve one person on an intermittent basis, or many people for an intense effort. It is essential that any intense effort be arranged in advance so that appropriate resources to get the job done on time within the highest quality standards can be accomplished.

d. Produce Reports. As a result of input, numerous reports may be run and available to the Event Team as well as participants. It is always recommended that RGB Profiles, for example, be delivered to participants in laminated form.

5. Assemble Required Event Packages. Using a specified folder or binder, assemble the participant package that will be used during the Event in sufficient quantity for distribution to all participants and members of the Event Team.

a. Participant Event Packages. Package materials for participants. Withhold selected materials that must be distributed at a specific time in the agenda.

b. Travel Packages. Prepare and distribute all related travel packages so those who will be traveling will have needed information available. Someone at the destination must have the itineraries of those traveling as well.

c. Facility Package. All those who have not seen the facility prior to the event will be better prepared if they have a schematic of the facility in advance clearly labeled to indicate the various areas and resources.

6. Advanced Materials Distribution. In many cases, it will be appropriate to provide participants with advance reading or work materials. Sufficient time must be allowed to distribute, and if necessary, collect materials provided. People who complete inventories and/or surveys in advance may require adjunct handout material if follow through literature is not already a part of the Event handout battery.

C. Transition to the Event Environment.

Movement to the Event environment and setup for a successful Event involves may details that need completion both before the move and at the Event site.

1. Review Planned Requirements. The Event Support Person must review the final plans to assure that everything planned has been accommodated in the load list or transition list. Events conducted in our own facilities may require different handling of Event materials during transition, but review will be essential in all conditions.

2. Arrange for Suitable Transportation. To a remote Event, the support person will arrange for suitable transportation to assure materials arrive on site in ample time for setup and configuration. The intervention team may accommodate transportation of casual items, or separate transportation may be provided by company vehicle, if available.

3. Load. Load Event materials for transportation to the Event site.

4. Travel. Complete and engage travel arrangements.

5. Unload Identified Event Items. The support person and others on the Event Team are accountable for unloading Event items at the Event site according to an existing load list. Care must be taken to “reserve” space for items that will be pickup up enroute (such as food and beverage items), and minimize overnight storage in the vehicle. When possible, items ought to be delivered to the Event site on the evening prior to the Event.

6. Manage Room Setup. Items transitioned to the Event site must be placed in the appropriate position in the room and furniture moved to the configuration identified in the Event plan. At least one half hour should be allowed before the opening of the Event for complete setup. If possible, setup ought to be completed the evening before an Event opening.

a. Introduce to Site Coordinators. Both the facility/client organization and Event Team will have someone designated as the coordinator. One of the first actions upon arrival at the facility will be to introduce these two individuals and begin working on facility/room layout.

b. Arrange Furniture and Equipment within Facility. The arrangement of furniture and equipment is a room to be used for group work is one of the most important considerations. Room Layout for a typical group Event is covered in detail at the following address: http://www.ltodi.com/room_layout.htm. The <u>Use of Equipment and Supplies</u>, Attachment 3, Facilitation Teams Manual, treats this topic fully.

c. Set Up Registration, Sign-in, and/or Handout Materials. If the Event Team is to conduct a registration for this Event, an appropriate registration configuration will be established at the entrance to the room. An appropriate Table will be set up specifically for handout materials/registration packages.

d. Place and Assemble Transported Items. Using the room layout diagram established for the Event, the Event Team will arrange existing furniture and equipment, and place special furniture and equipment transported to the Event.

7. Set and Test Equipment. Test all equipment prior to use to be certain that is works as expected and fix anything that does not meet expectations.

8. Choreograph Team. The Event Lead will provide a walk-through of the Event agenda and part to be played by each team member to be certain that the team is well synchronized.

D. Conduct the Event.

Conducting the Event according to the design (plan) may be adjusted during the Event to achieve Event outcomes as stated. It is important that each member of the Event Team know the roles they are expected to play and work in full coordination with the Event Lead who is the final authority for all design decisions.

1. Arrival and Initiation. As the Event Team arrives at the site, they will initiate implementation of the Event plan. Any unfinished items from the room setup will be finished. All food and beverage items will be made ready for the arrival of guests. According to the style and preferences of the Event Lead, the final ten minutes before the opening will be devoted to last minute checks to be certain the all advance work has been completed. Normally, the Event Team will gather in the “hot” area to make these final coordination checks.

2. Greet Participants. As participants arrive, they will be greeted by anyone on the event team free to do so. The client will be particularly greeted and made aware of any appropriate items needing attention. If handout materials are available these will be distributed along with any other appropriate materials. Our casual atmosphere will be developed right from this greeting effort and will be maintained throughout.

a. Register and/or Greet Participants and Guests. As participants arrive someone assigned from the Event Team will greet them appropriately and mark the Event Roster accordingly.

b. Provide Registration Materials (if required). If materials are to be distributed to all participants in advance of the opening remarks, materials may either be placed at the individual seats, or handed to the individuals at registration - the later being preferred.

3. Implement Agenda. As determined by the Event plan (horseshoe), opening remarks will provide the start cue that the Event is underway. Unless the group dynamics require an on-the-spot alteration, the Event plan will be followed closely through closure. Some Event plans follow a typical course, while others will be specially designed. It is imperative that standard Event plans be used for all events that may require long-term or inter-client synchronization. Departures from these standard plans must be boldly noted and, when necessary, plans made to refocus significant departures back to the original plan.

a. Track Progress Visually with the Group – Recap Often. It is the facilitator's responsibility to help the group meet its established outcomes. The best way to accomplish this task is to challenge the group each time the agenda allotted time is exceeded. When feasible, the facilitator is expected to alter the design of the Event to meet both outcomes and the time allotted for each activity.

b. Keep a Record of Deviations from the Plan. The facilitator must make an annotation on the agenda to maintain a record of any significant deviations. In the post-event documentation it is appropriate to call attention to any significant deviations and the rationale for them.

4. Conduct Setup. An initial phase of interaction at any Event is to conduct a Setup. This provides participants with a "grounding" that lets them know what their experience will be like for the duration (or significant portion) of the Event. A Setup will typically last from 5 to 10 minutes and contain an explanation of who will be involved (this is an ideal time to introduce the facilitation team), what will happen (describe any techniques that will be used), when the various "parts" will happen (reviewing the agenda and timeframe for each segment), why the Event is important to them (cover the outcomes to be achieved at minimum), and how (explain any unique characteristics of the Event that may be of particular interest).

a. Permission for Photography and Videography. Always ask for permission to use photography and videography. Some participants belong to religious groups that prevent an image being made of them. In addition, for any reason, it is only courteous.

b. Agenda Review. In the final minutes before opening the session, conduct a brief review of the agenda to be sure that something important a not been omitted or that last minute conditions do not make a change necessary.

c. Transcribed Chart Availability. If transcribed charts are going to be made, or if digital copies are to be made, it is appropriate to make these copies during the session (close to the session end is best). In this way, copies can be distributed to attendees quickly and efficiently. Let the participants know that you intend to make transcribed copies available so that they will not expend effort taking notes when their attention might otherwise make a big difference in achieving outcomes.

d. Handout Information. If you have handouts that will be provided as the session progresses, let the participants know the timing of release so that they will take fewer notes and pay attention to what is going on - being said. This is not to discourage note-taking, but rather to keep distractions to a minimum.

5. Conduct Initial Check-in. A check-in is a period of time used to make sure the facilitators and members of the group are on the same "sheet of music." A check-in can be the opening part of a follow-on session that gives members of the group a chance to catch up with each other and get their "head" back into the context. The check-in may last five minutes, or over an hour. The duration is a tradeoff between being able to move forward with a more effective foundation versus just churning the air with irrelevant information. It is entirely possible for the facilitation team to have check-in topics as a means of covering important items that were previously neglected. The bulk of time must be committed to participant clarity, however. The Lead Facilitator, or someone designated to do check-ins, needs only start this segment with the question, "So, what have you been thinking? Are the points that seem unclear to you that we can help clarify before we move on? Is there any lingering confusion?" The facilitator must avoid putting anyone on the spot by asking a specific question, especially of a specific individual. The check-in is not an impromptu quiz.

a. Integrate Newcomers. Review the key points that will bring everyone to the same understanding of what has already been completed and what lies next. If newcomers have not been introduced, this is a good time to recap introductions. Never ignore the presence of a newcomer.

b. Clarify Confusion. If there is any likelihood of confusion, a Check-in is the ideal time to evaporate it. At its best, the Check-in is a great opportunity for those who have been particularly excited about what has been going on to help others come to the same understanding. The facilitator isn't the only who can clear things up, let the group police itself.

c. Create Context. Use this time to create a context for the entire session or series of sessions. This is particularly important if the group has changed members from the first to the current session. Prolonged group work makes it difficult to remember what the initial challenge was all about. If the period of the sessions is prolonged, it might be imperative to link the past (include in the past that period that ends with the last planning session) with the future that begins with the first implementations.

6. Create Charts. The public record of Event happenings will be made by the Event Team Anchor(s) as the Event unfolds. Charts will be numbered sequentially as an aid to continuity both for those in the room, and those who must leave and return to the room. Care will be taken to follow the chart creation guidelines in the Cultural Facilitation materials on graphic facilitation. When possible and appropriate participants will also engage in the creation of charts so as to build ownership and increase the learning opportunity. See also Tab 9, Graphics.

a. Border each Chart. Drawing an interrupted border approximately 1.5 inches from the edge of the easel paper frames the chart and helps participants focus their attention on what is being recorded. A three inch interruption in the border at the top right and lower left will help participants remember what is on the sheet more readily (see Tab 2, Model, VAK). Leave approximately four inches from the end of the interruptions to the edge of the border. Purple or Turquoise borders are recommended. Refrain from using Black or Red as border colors.

b. Number and Hang in Sequence. Draw an ellipse in the lower right corner of each chart when it is finished and eventually place the chart number (incremented numerical sequence) within the ellipse. As charts are finished, someone is designated to hang the chart sequentially on the wall so that it can be readily seen by participants, referenced by the facilitator and participants, and modified if needed.

c. Use Appropriate Colors. The main colors within the border need to be Red, Green, and Blue, Purple, Magenta, Brown, or Turquoise. Highlight with Yellow, or Orange.

d. Use Outline Format with Bullets. Outline format consists of major headings being centered with the next level aligned at the left edge of the border, while subordinate elements are indented to a logical level. Vary the shape and highlighted attributes of outlined bullets for consistency. Bullets consist of logical familiar shapes (squares, circles, triangles, diamonds, etc.) Summarize what is being said into short bursts of three to seven words. If need be, ask the person with the idea to summarize what they have said.

e. Mark Important Discussions/Decisions. If an important discussion point is made or an important decision reached, mark that line(s) in the right margin with a special character - an explanation mark "!" is recommended. Use a bright color and highlight (Red with Yellow highlight is recommended.

f. Use Block-Upper-Case Style Print. Use a distinctive block print that engages an upper case letter for all letters, with a larger "typeface" for capital letters.

7. Manage Charts. The support person and, when necessary, participants will assist the Event Anchor with chart movement and management. Charts may be transcribed while the session is underway. Movement of the charts to hang on the wall in full visibility must be accomplished with care so as to maintain continuity of thought and facilitate the lead being able to make connections as the Event unfolds. When possible and practical, transcribed charts may be given to someone in the organization for distribution upon completion of the Event. Originals of transcribed charts are retained by the Event Team for appropriate files. Chart originals are retained until distribution to the clients system has been completed, so that questions about transcription accuracy can be answered should they arise.

a. Establish System for Managing Charts During the Event. Designate one side of the room as the beginning-of-flow and drape the charts on one or two levels in chart sequential order based on the chart number. Use break periods to rearrange charts if direct posting is disruptive to the design flow. Leave room for charts that will be used during breakout sessions, when the design calls for those activities.

b. Establish System for Transcribing Charts. Charts can be transcribed during of following a session. In some cases, it is ideal for one or more participants to transcribe charts while the session is underway. If digital photography is used (recommended), it is possible to capture frames during the final hours of the session and burn a CD in the room for a Point-of-Contact to take with them. In any case, this "system" should be decided in advance and executed according to that plan. It is NOT recommended that charts only be transcribed into typed form. Although this has administrative value, it turns out NOT to have "remembering" value to those who attended.

c. Determine Status of Chart Transcriptions at the End of the Event. Close to the Event end, the lead facilitator (or other designated team member) needs to know the status of chart transcriptions and announce that status before participants leave the room so they will know what to expect and when.

d. Create "Table of Contents" Following Transcription. Time-permitting, when an Event is complex or covers several days of work, it may be appropriate to create a Table of Contents that can be included in the Transcription package. In extraordinary situations that merit the effort, it may even be appropriate to create an Index.

e. Decide if a Transmittal Letter Will Accompany Chart Distribution. There is already a set template for the distribution and use of transcribed charts that accompanies package provided to the Point-of-Contact or Client. A Transmittal Letter is optional.

f. Set Up Distribution Plan with Point-of-Contact if Necessary. If the Point-of-Contact is hesitant about providing a copy of transcribed charts to everyone who attends the session because of reproduction cost, the Facilitation Team must undertake the duplication so that this barrier is eliminated. Normally, a digital product eliminates these concerns as well.

8. Manage Handouts. The support person, in cooperation with the Event Lead and Anchor will manage the availability and distribution of event handouts. Normally, Event handouts will be transported in the Event box, and laid out on a table so that full view can be sustained during the Event. The support person may elect to sub-divide handouts into appropriate quantities (by table or row) to facilitate faster distribution at the time they are needed.

a. Arrange Handouts for Distribution. At or near the "front of the room" a table is normally reserved for handout materials. Before the session begins, the Event Lead will ensure that Handouts are laid out in the order of distribution as determined by the Event design.

b. Distribute Handouts on Time. One person on the Event Team is designated to ensure that Handout materials are distributed on cue.

9. Managing Introductions. Two types of introductions are appropriate (on occasion both can be done during the same Event - given an appropriate amount of time. Simple introductions just let everyone know who is in the room with them, and some surface information about each attendee (name, organization, job, etc.). Complex introductions are normally done following a suitable "warm up" that allows people to be comfortable with others in the session with them. Having played a fun game might be a suitable comfort building exercise. Complex introductions will permit more revealing information (What makes me angry!) to be exchanged, and perhaps even a demonstration of some kind (a drawing of my life's path - to date).

a. Used to Record Attendance. Introduction Sheets may be used to cross check or be the only evidence of attendance. In many cases the ***CapacityWare™*** Event Roster can be completed from Introductory Sheets.

b. Used to Help Personalize the Session. Keep the Introduction Sheets highly visible during the session as a key to help people know the names of those in the session. It also helps participants identify with each other as the sheets contain information that helps jog memory.

c. Used to Help Develop *ProZones*. When participants introduce themselves, and the Event will span several days, leave a blank space between participant's names (insert a box) so that as the Event unfolds additional information can be added to this box about the person - either by them or by other participants. If the Event is highly complex, have each person be responsible for his or her own introductory sheet.

10. Manage Music and Videography. All Core Events require musical support. Some will be enhanced by videography. The support person will manage these important items as they enhance the learning process. Music and video “sets” may be available for specific Core Events so that selections can be made more easily. The availability of “sets” will not preclude a review of the material in advance to assure appropriateness, however.

a. Play Music According to Design. Music or appropriate video productions are an invaluable group stimulant during specific times along the Event Design timeline. Playing music during breaks masks the silence and fosters communications (***ProZone*** development) among participants. During breakout or work sessions, playing music adds to the sense of task urgency and actually fosters increased productivity.

b. Video Appropriate Presentations. If consistency is important, it may be appropriate to play a short video presentation to ensure that everyone gets the same message, for example.

c. Point our Music/Video Handout to Participants. Make sure that the music or video presentations used are appropriate for the characteristics of the group. Do not use highly contemporary music for a more senior group of participants, for example.

11. Conducting Lecturettes. A lecturette is a short 5 to 10 minute burst of information provided by the facilitator in order to inform participants so that their participation can be more productive or better channeled. Lecturettes are just in time deliveries of new information. A lecturette can be completed during a check-in, for example, with total effectiveness. A lecturette may have a handout associated with it or not. A lecturette normally precedes a tasking.

a. Sample Scripted Lecturettes. Many lecturettes are available on a wide range of topics. Users may find acceptable scripts or outlines on-line to satisfy their needs.

b. Most Lecturettes are Explanations of one or more Models (see Tab2). The most frequent use of lecturettes center on an explanation of any one or combination of Models. Tab 2 in this manual has a brief explanation of each model and is often sufficient as an outline for lecturette purposes. In many cases a MS PowerPoint™ Presentation is also available.

c. Some Video Productions of Lecturettes are also Available. A high priority on the video production list is the creation of video lecturettes - especially those in the RGB and commonly used Models area. Available videos are listed on-line.

12. Conducting Taskings. People are provided tasks to complete so that learning can take place within a specific and controlled context. Tasks may include playing games or other assignment work. A product may or may not be required at the end of a task. Normally, tasks are assigned to small groups. It is highly desirable for the task assigned to be written (on a sheet of paper and on a handout, or on a large paper displayed in front of a group). If the task is complex, it is desirable also for the facilitation team to illustrate (model) the task so participants are sure of what is required of them.

13. Task Report. Once a task is completed, the results are normally reported out. In a group setting, several reports on the same or similar topics may be completed at the same time. Require, as part of the task, that someone record the results of the task assignment and that someone be prepared to report out the results (if this is done in a group setting).

a. Save all Task Reports. Each group report is used for research purposes and for potential Technology integration. Much of the ***CapacityWare™*** Technology has been learned from the practical use of current and past practitioners. ***QWLC*** is committed to advancing practical applications before the theoretical or academic.

b. Include Report Charts in Transcribed Charts. As participants report out to the rest of their group, make sure that their report is on easel paper so that it can be automatically included in transcribed charts.

c. Number Task Reports Accordingly. It is often difficult to number brief out reports when the group work has been completed simultaneously. It is suggested that the sheet numbers are sequential as presented, and that multiple pages in the same report be annexed with an alphabetic character (37a, 37b, 37c, etc.) to account for this simultaneous preparation and staggered reporting sequence. As part of the initial tasking, charge the sub groups to apply the alphabetic sequence to their charts rather than the number. If the reporting sequence is known, the facilitator can number the charts as the groups complete their work and before they brief out.

14. Process Exploration. Once any task is completed, the facilitator may ask simply, "What happened? What did you learn? What were the similarities between your experiences? What was different about what happened?" The notion is to get people to articulate what they learned. Knowing that not everyone will learn the same thing from an experience, this critical activity will seed all participants with the learnings of every other participant.

15. Manage Breaks, Meals, and Refreshments. The Event Team Support Person will manage breaks, meals, and associated refreshments. Normally, breaks will occur about each hour and last for approximately 10 to 20 minutes depending on the function of the break (physical relief, breaking state, or development of group cohesion). Meals are normally scheduled about one half-hour prior to noon, or one hour prior to the traditional evening mealtime. If the group takes a meal together, time must also be provided for them to break from the gathering and maintain private time. Refreshments are always available, especially during breaks, and prior to the opening remarks.

a. "Schedule" Breaks in Horseshoe (Event Team). During the planning sessions (Phase 1) a Horseshoe technique is used to create the agenda. As times are estimated, breaks are scheduled so that they will occur before or after specific activities. It is the Team responsibility to assure that Breaks occur as planned and last for approximately 10 to 15 minutes. As a group matures, breaks become a longer probability. Longer breaks permit ***ProZone*** loading and are encouraged once the group enters a "Control" phase of maturity.

b. Inform of Upcoming Breaks. Keep the participants informed of the timing of breaks so that they can gage their level of comfort. From the beginning of the session, let people know that breaks will occur about every hour or so, but that they can take liberties with that for any reason (give them an out by mentioning "…having to make an important call on time…".

c. Coordinate Timing (Event Team). If refreshments are served during a break, coordinate the timing so that food and beverage are ready when the break begins. If the activity following the break is appropriate encourage participants to bring food and beverage back with them from the break as well. Some people with specific physical necessities may require frequent "nibbling" to maintain optimum attention.

16. Manage Exercises/Activities and Learning's. The Event Team Lead is accountable for managing the conduct of exercises and the learnings that emerge from them. Other team members will assist with any special aids required and record learnings as a matter of routine. Exercises will be carefully constructed to assure they are in line with the overall learning objectives of the Event, and well synchronized with the context within which they must fit at the moment they are introduced.

a. Provide Exercise/Activity Instructions. Tasking the breakout group with instructions is the MOST important part of any activity. It is recommended that the Team try out all instructions and activities in advance to assure clarity. In addition, provide written instructions whenever possible (on an easel pad as well as in a handout, if appropriate).

b. Guide Exercise Stages. If an exercise consists of several complex parts, divide the exercise/activity into more than one stage giving instructions when the group is ready for them. In some cases, consider shifting participants from one breakout group to another to continually develop ***ProZones*** among members of a homogeneous work group. This kind of adjustment also encourages the cross feeding of ideas developed in one group to members of another.

c. Group Reports. When selecting breakout groups to report out, ask for a volunteer unless the sequence of reporting is important. The reporter for the first group to report out will often receive a nominal reward just to signify the kind of culture we want - one with energy and initiative.

d. Process Exercise Results. Once all break out groups have reported out, ask the group full for observations about all reports, not necessarily a specific report. This will enable the members to make observations that might prove to be useful to everyone. It is always a good idea to begin recording again at this time so that these observations can be captured and returned to the client as learnings.

e. Breakout Team Feedback. If the Exercise/Activity is weighted more heavily on learnings rather than the content of the exercise/activity, it may be appropriate to conduct a brief feedback sidebar for those in each breakout group or for the "presenter" so they can learn immediately from their experience.

17. Manage Interim Check-ins, Check-ups, and Check-outs. These three categories of "Checks" call for participants to make observations and draw conclusions from what they have observed. Not everyone in a typical group will be equally adept at this type of mental exercise – so do not expect high participation from everyone initially when used. Faithfully record their insights and potentially hang these insights in a different area for follow-on connections when appropriate.

a. Provide Rationale. A group Check-(Anything) is designed to get everyone on the same sheet of music or have a dialog about what is happening so that an obvious utility will result. During the first and several subsequent Check-(Anything) the facilitator must provide a very brief bit of rationale for the technique. Those that are on-track as they should be might be frustrated if it wastes time, but the one key or few important participants that are confused will pay the obvious dividend for going slow to go fast. It is also important that this technique often seeds the team culture with an "ask questions for clarity anytime" undercurrent. Normally, the Check-in at the beginning of day two is the most important one of a multi-day session. People have had an overnight sleep to fester about confusions and will be willing to seek clarity at that point more readily.

b. Conduct Check-in, Out, and Up. The way to begin the Check-in is to ask, "So, what thoughts do you have about what we've done or are going to do?" A Check-out begins with the question at the end of the day, "So, looking back, what do you want to know before we end our time together?" And the Check-up is directed at the performance of the group by asking, "So, how are we serving each other and what might we do differently to be even more productive?" There are obviously alternate questions, and Team Facilitators are encouraged to deviate.

c. Connect Insights. When people have insights as a result of any Check-(Anything), ask them or anyone else to give their thoughts on how this observation might connect with other happenings.

d. Team Member Feedback. It is also appropriate that the Team Lead and/or Anchor get some feedback at the end of any segment. There must be time to adjust and meet participant expectations, however, if feedback is received. Simply ask, "So, is there anything I could do in the next segment to be more attentive to your needs?"

18. Manage Awards and Recognitions. Token awards are always used to acknowledge above average participation in some way. Anyone in the group may call for an award. Remember, it is not the aware itself, but rather the pause to present it that matters. The support person must be aware that the potential for awards is ongoing and be prepared to assist in the construction of these items quickly and effectively.

a. Explain Criteria. It is an excellent time for the Team Anchor or Support Person to get some brief air time buy explaining what the reward criteria is and give one or more examples. For example, we award "gems" for people who say difficult or insightful things during the session. It is the type of team culture we want, and to best illustrate this we make it an obvious point when people do it.

b. Explain Specific Award or Recognition. "Gems" have a specific meaning (see above). We also award a shovel to people who have dug themselves into a hole and are having trouble with it. We have a supply of Red, Green, and Blue shovels at most Events just for this reason (it typically happens). These and other "awards" are mementos that we hope will find their way into the workplace and generate conversation among people who did not attend. Visit our Website and get more ideas on rewards and the meanings we attribute to them.

c. Model Appropriate Presentations. Early in the Event, use the Facilitation Team to model the type of presentation that may occur. Encourage participants to be reward presenters as well as recipients.

19. Manage Attendance Records. The Event Support Person will manage attendance records. Records may either be generated in advance of the Event and verified during the Event by participants or generated during the Event. The former is preferred. Attendance records are used to determine levels of specific participation that can then be compared to inventory or survey data in an effort to validate or change intervention strategies.

a. Circulate Attendance Records. Determine who will complete and post to ***CapacityWare™*** the attendance for all Events and be certain that that individual has the where-with-all to complete the task completely and accurately. If attendance documents are required by the client organization, coordinate this activity fully.

b. Validate Attendance. Use Introduction Sheets and Group Photographs as a crosscheck that attendance records are valid.

20. Manage Facility Comfort. The physical comfort of participant guests must be attended to at all times. This is particularly true of temperature levels in the room being used. Too hot or too cold a room impairs the learning that must occur during the session. In addition, the chairs, tables, and even the floor coverings used during the session may take a toll in the overall success of the Event. The support person must be especially aware of these factors and adjust accordingly.

a. Adjust Temperature. One of the most frequent complaints about the facility is the room temperature. Look for signs of discomfort and try to adjust the temperature accordingly.

b. Adjust Seating Arrangements. Some rooms have natural hot or cold spots. Rather than try to adjust the temperature, rearrange the seating so that those who prefer the cool are sitting in the cool spot and those that prefer the heat are sitting in the hot spot.

c. Attend to Other Signs of Discomfort. Be sensitive to other signs of discomfort. Let people who are having a hard time seeing or hearing sit closer. If sitting next to the boss is causing some anxiety, shift seating without being obvious about it. If friends are having too many side conversations, mix the seating.

21. Manage Interruptions. Everything from an emergency phone call for a guest, to a fire drill must be anticipated and an advance determination made as to how it will be handled. There are myriads of potential disruptions that can and will impede the progress of learning during a group session. All team members must be ready and willing to respond to these interruptions deliberately.

22. End Photographs. Create the custom of taking a "graduation" photo for each Event. These photographs make a wonderful "gift" for each participant as a memento of the Event.

a. Web Posting. Web posting of group photographs is a good idea, but get permissions first. Some participants may not want their photographs available on the Web. Ask if password protection would make a difference. It is always a good idea when participants want to trade information with one another (phone and e-mail is a common desire). They could have their own web page!

b. Publicity. If use of the photograph is extended to publicity or advertising, get an model release from those whose image you use.

c. Frames and Mementos. If the group end photograph is to be presented as a memento, include the purchase of a suitable frame to set a tone for the occasion.

23. Certificate Presentations. When the names are known in advance, and the context of the event makes it appropriate, prepare and present "completion certificates" at the conclusion of every Event. In many organizations, attendance at some Events is made a permanent part of a person's personnel record and often plays into promotions and other career advancement decisions.

a. Suitable Parchment/Paper. If certificates are provided as a result of the Event, select a suitable paper (parchment is a nice touch) for the document. Although some boilerplate documents are available, one can spot them a mile away.

b. Standard Format. It is recommended that a unique certificate setup be created and used with consistency. If people attend who are not from a homogeneous work group this will matter little. If members of a workgroup attend together, or attend the same certification Event but not at the same time, it becomes even more important that a standard format be used to convey consistency.

c. Optional Frame. If certificates are presented in a frame (recommended), the same frame from one Event to the next also conveys consistency. Consistency of the frame implies consistency in the materials covered and topic discussed as part of a learning Event. These subtle messages becomes extremely important in the credential development process and is important to recipients.

24. Evaluations. Collect numerical and narrative data at the conclusion of every Event. A simple 5" x 8" pre-printed form may be used (See Attachment 1.1.7 for a suitable illustration of the card format). Some Evaluation forms are created specifically for an Event when needed. An Evaluation Form Template is available for tailoring.

a. Standard Evaluation Form. The use of standard evaluation formats becomes critical when comparing the effectiveness of Event Designs, and Facilitation Teams. Spend the time to develop evaluation instruments that can be used for as broad a spectrum of Events as possible to preclude having to deal with incompatible results.

b. Record in *CapacityWare™* for Trend Analysis. ***CapacityWare™*** has at least two methods that can be used to identify trends among evaluation results. In either choice, the use of ***CapacityWare™*** as the tool of choice means that comparisons can be made readily and consistently.

c. Return to Participants. When evaluations are used it is always a good idea to return evaluation results to those participants who provided the evaluations. Only through this type of regular feedback will an organization culture shift to a more collaborative and productive nature. It also helps those who rate too high and too low to be able to see that their ratings MAY have been out of line. Often, raters believe that everyone rates about the same as themselves. This feedback method begins to bring ratings more into a realistic window.

25. Manage Guest Departures. Guest departures are a matter for the entire team to manage. Just as we greeted arrivals, we must also be available to bid farewell to those departing. If people have a need for specific follow through engagement, it must be recorded in the Event file to assure it happens, for example. It would be well to be aware of the time of day departures are made and release the group a few minutes early to avoid a traffic back-up for example. In inclement weather, departure by doors closer to parking may be arranged.

26. Initial Event Clinic. Immediately following the Event the Event Team will conduct a clinic to assure that successes and shortfalls are well discussed and documented. This process is done to enhance the continuous improvement of Event production. Individuals learn from the experience as well as the organization. It is the primary platform from which technological improvements are identified and made.

E. Transition from the Event Environment.

Movement from the Event location leaves the facility as it was found. Upon return, all "extra" Event-specific materials will be destroyed. Reusable items will be return to inventory. Used supplies will be identified and replaced as necessary.

1. Pack Items for Transition. The entire Event Team is accountable for packing the Event materials and items in containers so they can be transported to the production facility.

2. Site Departure Protocol. Our standard is to leave the site in at least as good a shape as we found it, and slightly better if the inconvenience is not too great. We want to be known as good neighbors that do not place an undue burden on those who provide us with facilities, even when we pay the bill. Our entrance and egress is accomplished at suitable locations determined by the facility managers. Our storage of shipping containers is out-of-sight intentional. We enter and exit at hours conducive to those activities. We manage our own refuse except for routine trash in provided containers. We never leave behind charts. We always repair any damage to walls or furniture. We recycle whenever possible.

3. Arrange for Transportation. From a remote Event, the support person will arrange for suitable transportation to assure materials arrive back at the production facility. The intervention team may accommodate transportation of casual items, or separate transportation may be provided by company vehicle, if available.

4. Load Items for Transition. Load items for return to the production facility.

5. Unload Items and Return to Storage. Unload items and return appropriate items to storage in the place designated.

6. Reconcile Supplies and Materials. The support person will determine supplies and materials used and restock packaged items to assure the next user is not caught short of a critical item. Unused and reusable items will be returned to stockage. Items completely depleted will be identified and placed on the procurement list.

F. Post-event Considerations and Actions.

Often the hardest part of any Event is the follow-through. In most cases, it is not only the Event but also effective follow-through that will determine client satisfaction. The Event Team is expected to "clinic" immediately and completes all necessary documentation. A list of post-event requirements is completed in ***CapacityWare***™ and used as a basis for determining the satisfactory completion of all Events.

1. Post Event Meeting (as needed). The Event Lead may elect to schedule and conduct a Post Event Meeting that will include those who will have follow-through responsibilities. As a result of this meeting, the Lead will establish:

a. Activity. Activity required from among, but not limited to, those described herein that will complete all Post Event Activity and cause the Event Record to be so annotated in the PRE/POST section.

b. Time. Determine an estimated time for the completion of tasks and make this a part of the PRE/POST records so that an estimate of the completion of all tasks can be made.

c. Task Assignments. Assign responsibility for the completion of tasks from among those available for the completion of specific activity.

d. Resources. Make note of resource availability (including time) to complete all Post Event Activity.

2. Transcribe and Distribute Transcribed Charts. If not previously returned to the client organization, unfinished charts will be transcribed, a "Table of Contents" constructed, and charts will be duplicated in sufficient quantities for everyone attending the Event. Charts will be distributed to all participants with copies posted to the Event Folder and the transcribed charts original file.

a. Transcribe as You Go. Select individuals from among participants that will transcribe charts during the session. This will enable both the immediate destruction of the charts following the session, as well as expedite the distribution to those who attended the session and others interested in results (see also Attachment 1, Tab 5).

b. Digital Transcriptions. Use a digital camera to digitally photograph charts during or following the session. These photographs can be printed as part of the final product, or incorporated into a CD/DVD deliverable.

c. Construct Table of Contents. If the number of charts is sufficiently complex, create a d Table of Contents to assist people in locating charts that will be of high value.

d. Reproduce Chart Packet. If the package is particularly voluminous, and if the client in long-term (which makes it financially feasible), reproduce the package in sufficient numbers that distribution to all those who attended will be easily accomplished. Our experience, unfortunately, has been that client organizations tend not to reproduce and distribute charts. This is especially true when the cost of color reproduction is prohibitive.

e. Distribute Transcribed Charts (Print, CD, or DVD). Make the distribution a part of the deliverable package. If media such as a DVD is involved, take the time at delivery to demonstrate the "show" and include several copies - for the library and for circulation to those who attended.

f. File Original Chart Transcriptions. Make it a practice to retain a master copy of the original set of transcriptions either manually or electronically. Some charts may be of research value and locating those charts must be easily accomplished.

g. Destruction. Maintain original charts for three weeks (recommended), then destroy (not simply discard).

3. Manage Photographs and Videos. Film will be delivered for developing/processing by the Event Support Person and photographs distributed for mounting on appropriate poster boards, or posting into albums. Videotapes will be logged into our library system and stored appropriately (see Digital Video Tape Library List behind Tab 4). The Event Team is responsible for photo and video follow-through (summer or intermittent help may be used in the processes when available).

a. Film Processing. Deliver film to processing vendor. It is recommended that a digital CD is completed in addition to printed copies (if print medium is needed). If the Event is part of a Progressive Design and Photo Boards are being used, order double prints at the outset - the cost of prints is dramatically reduced with an initial double print order. Digital photography proves to be far more versatile than printed media in the long run. Digital photos are always easier to use in the creation of articles for newsletters, for example.

b. Pickup Developed Film. Pick up the film and inspect it before leaving the lab facility. Often labs will not charge for frames that are not usable. If you can identify specific prints that can be made a good-will gift item have them complete those immediately if possible.

c. Separate Photos (boards and albums). If Progressive Design is being used, separate the two print set into Photo Boards and Albums for further preparation before the next Event.

d. Construct Photo Boards. If the Event is part of a Progressive Design configuration, create the Photo Board to be displayed at the next Event and used by the client organization to inform the general population.

e. File into Albums. Maintain albums that permit the easily location of Event-based photographs. It is easier for photo retrieval and for a visual record of the Events in a Progressive Design series or within an "initiative."

f. Canister Library. When a system of film photography (Advantix is recommended) is used, it will be highly desirable to maintain a library of film canisters.

4. Videography Production. Client videos are an optional offering for most interventions. The client uses the video as refresher training, or simply an anchor for "a good time was had by all" Event.

a. Take Video. In planning for videography as an adjunct offering, remember to take video in preparation for the Event, during the Event, and after the Event has concluded. Often the before and after inform the client that the Event they have paid for is a far greater task than just the Event they witness.

b. Capture Appropriate Scenes. Video production software (Pinnacle is recommended) enables the user to capture and work with only the scenes needed rather than use the entire videocassette. This technique will ultimately Enable the delivery of a dramatic product that most clients will not expect.

c. Edit Timeline. Captured video can be edited into a production that tells the Event story quickly and easily. It is often desirable to have a 3-minute clip and a longer "feature" presentation that gets at the details of the Event.

d. Make a DVD. The most desirable format for delivery must be decided, but in all probability the best media will be DVD. Alternatives are normally available in whatever software package is being used. Create an appropriate label and container for the product.

5. Client Product Package Delivery. When all products have been completed and packaged, Event results will be delivered to the client at a meeting that will highlight what has been achieved and the efforts made before, during, and after the Event to assure success.

a. Make the Appointment to Deliver Post Event Products. The Post Event Package Delivery is an event that is often as important as the Event it represents. Clearly, this event is as much a marketing event as a follow-through, and should be approached with equal energy. Schedule sufficient time to make the presentation on your terms - the culmination of a quality service and product mix. Treat the delivery as an Event or at least as the final chapter (notes) in the Event Record.

b. Select (and modify, if necessary) and Include the Post Event Literature Prescription. Major Event Designs will have a prescribed literature package that helps participants' follow-through with design suggestions. This literature is designed to help embed workshop principles in those who attend by challenging them to complete certain tasks.

c. Assemble the Package. All deliverables are delivered in a cohesive package designed to impress the client and stand out among competitors. The package represents the Core Event and all that went before it and followed on after it.

d. Deliver the Package. Take complete notes at the delivery and include them in the Event Record for future reference.

e. Update Client C.H.A.R.T. At the time the Client Package is delivered, update the Client Chart as soon as the delivery meeting is over. Inform the client that this is being done so that information being made available to internal resources is known.

6. Formalize Clinic Results. The Senior/Lead Consultant will review clinic results and take actions to formalize follow through requirements. This may range from distributing materials to guests, to coaching Event Team members in areas needing improvement. In addition, suggested improvements in technology must also be posted to an appropriate place so that technology updates can take full advantage of lessons learned from the current experience.

a. Copy Clinic Report and Distribute. Once the Clinic Report has been finalized in the ***CapacityWare™*** Event Record, it can be distributed to the Event Team and any other individuals interested in the management of facilitation resource across the organization. Normally, this action is delayed until the client Event Package delivery is completed in case there are added implications that surfaced during follow-through delivery.

b. Determine Impact on Technology. Review the clinic results to determine if there is an impact on the Technology. Make a note of implications or recommendations in the Event Record and communicate these implications to the Technology author for incorporating into the next edition of the Technology in question.

7. Update Technology. As a result of any Event, new materials may be generated and included in a future publication of appropriate Technology. The primary test to determine acceptability is the universal application of the literature based on learning. Technology updates may modify current literature, or may create new literature.

a. Progressive Design Technology. The use of some models is part of a linked progressive design - that is to say, for example, that any alteration of the RGB Model designed workshops may have a potential impact on subsequent models used in a design series. Because of this special attention must be devoted to assuring synchronized technology.

b. Technology Updates Completed and Distributed. Changes and/or additions to Technology may be handled immediately, but the typical handling will cause a needed change to occur when the Technology comes up for review. Distribution, unless a special distribution is called for, will be to holders of the documents being updated.

c. Web Updates. Technology holders update their literature when new materials are offered. Normal updates are publicized in The RGB Way! monthly.

8. Identify, Order, and/or Pick Up Needed Supplies. Upon reconciliation of materials and items returned to the production facility, a purchase request is made to resupply required items. The calendar must be consulted to determine the degree of urgency required, and items must be procured accordingly.

a. Procurement Lists. Needed supplies are purchased on routine buying trips whenever possible.

b. Order supplies (as needed). Some supplies will be ordered, for example, using Internet vendors when cost considerations merit this approach.

9. Update Records and Files. Event Records will be completed and all files updated. Attendance records and models used, will be recorded/updated in the appropriate database so that complete change records can be known for each individual, team, work group, and organization. File completion includes:

a. Complete Attendance Records. Attendance Records are completed in ***CapacityWare™*** in accordance with instructions contained in that Manual.

b. Note Client Delivery Completed. The Event Record will be annotated to include notes from the Client Package Delivery meeting. Normally these annotations will be made in a separate Notes file within the Event Record.

c. Clinic Summary Written by Team Lead. The Team Lead may elect to create a Clinic Summary and have that separate document included in the Event Record.

d. Prepare Event Folder for Archival. Review the Event Folder for archival by extracting all materials that are not otherwise available. For example, a list of handouts will be sufficient rather than archiving all handouts.

g. Decide and Schedule Follow-through Requirements. Assure that all follow-through or adjunct scheduling requirements are posted to the calendar.

h. Special Consulting Notes. Add any special consulting notes to automated ***CapacityWare™*** Event Record from the Event File before archival.

i. Publication Narrative. Complete and distribute a synopsis of the Event that will suffice as a brief article that can be used in a variety of publications.

j. Enter Date that all Post Event Activity is Completed. Enter the date that all activity is completed in the Event Record. In addition, append the following "_-_DONE" to the end of the Event Name field. This will prevent the Pre- and Post- Activity requirements from appearing on the Priority Report.

k. Complete Financials. At the outset of an Event, a budget is established for all activity. At the conclusion of all Event activities, the budget must be reconciled to that invoices can be completed (delivered and reconciled), and so that fenced resources can be released for other Events.

10. Conduct Event Folder Close Out. When all activities associated with the Event are completed, the event lead will "close out" the Event Folder (timely closeout is considered to be within one calendar Quarter from the end of the Event or Initiative , whichever is later). The summary data will be removed from the file for separate processing and the remainder of the file will be temporarily archived, if appropriate. Annually, a determination is made concerning the complete disposition of client records.

a. Review. Review the file to determine that actions associated with archival preparations are complete. Complete any lingering requirements.

b. Archive Event Folder on Schedule. Do not retain Event Record in an active status beyond their archival date. The archival date is normally posted on the file at the reverse of the file label. As a practical matter, archival normally occurs when file space has become a premium, thus demanding file cabinet expansion or archival (normally done in Bankers Boxes in a Storage facility.

c. Print-to-file Event Records and Distribute if Conditions Warrant. In the event that Event Record(s) and being exchanged with others, create the Event Record as a word Document and attach it to an e-mail to those requiring it as part of the Archival process if that has not already been completed.