

**Certification and Licensure Requirements**  
**To**  
**Practice and Master**  
*CapacityWare*™ Technologies

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## **A. Overview.**

There are ten sequential phases that comprise the certification and licensure process. Completion of phases entitles an individual to a specific credential based on satisfactory demonstration of knowledge and ability to perform to an established standard. Failure to demonstrate continued established performance standards may result in loss of credential until acceptable standards are demonstrated.

### ***1. Outcomes for Certification and Licensure.***

We believe this systemic Technology is the most comprehensive methodology available to bring about effective organization capacity improvement. It encompasses successful organizational change engagements from the very simple to the enormously complex. We acknowledge that some users prefer to use the **RGB** as a "stand-alone" on an intermittent basis to improve nothing more than personal and interpersonal understanding. That is a noble task in and of itself. We also know that others will want to use the full range of connectivity that this Technology has to offer. The range is comprehensive and up to the task for the most complex of organizations. We want certification and licensure to serve both ends of this spectrum equally well. The Residency phase, as you will learn, is intended to ensure that practitioners know the potential applications to which this Technology can be engaged. The Residency serves both the intermittent **RGB** users as well as laying a firm foundation for more rigorous demands. The ultimate user will determine the level of use. Our job will be to assure an understanding of the essentials so that users can make an informed choice as the needs become more apparent.

### ***2. Credentials. Two types of credentials are available:***

**a. Certificate.** A certificate allows use of specific Technologies while serving clients and is a foundational requirement. Certificate holders may advance to a License agreement.

**b. License.** A license extends privileges to include the preparation of others for certification and licensure.

### ***3. Capacity.***

Capacity is the workforce quality that enables its members to find and fix barriers to achieving full potential from within its own ranks - to find and solve problems internally.

### ***4. Workforce Capacity Recovery versus Development.***

Recovery is necessary when a member of the workforce intentionally withholds discretionary capacity when ability, skill, and knowledge are otherwise available. Development is indicated when ability, skill, or knowledge are not available.

### 5. *CapacityWare™ as a Technology.*

(A unique language commonly used by practitioners defines a technology. The application of a technology allows practitioners to replicate success in a prescribed undertaking.) Although *CapacityWare™* falls within the classical organization development domain, its language is unique to those who use it, and therefore it qualifies as a Technology.

## B. Phase I, Exploration.

Prior to making on-line application for licensure or certification, explore the topic by considering the following information. We desire to license those who have a serious interest in applying our Technology in their client organizations with regularity as internal or external consultants. Licensure is reserved for those who will prepare individuals for certification under specific agreement with *QWLC*. We are also interested in having a pool of potential readily available qualified consultants that can augment each other with large-scale interventions or act as substitutes when conditions warrant it. Although it is desirable for face-to-face interaction with "expert" practitioners from time to time, this program of Certification and Licensure relies heavily on the Internet as a resource for those at distant locations.

The LTODI web site identifies those who have already become certified. It is recommended that these individuals be contacted to determine the value of this certification before commitment is made. It is also possible to acquire feedback from participant groups that have completed this training to determine its value to them and their organizations. For more information go to [LTODI.com](http://LTODI.com).

### 1. *Rationale for Certification and/or Licensure.*

Certification will enable a qualified individual to exhibit recognizable and acceptable standards to be applied to *CapacityWare™* designs without lock-step adherence. We do expect each certified practitioner to inject his or her own twist to every engagement without abandoning a core of uniformity that constitutes our "signature" approach to capacity recovery and development. "Signature" standards are communicated and demonstrated in the Resident phase. We recognize that the applications of this technology are enormous and that knowledge of the full range of capability will enable growth of both individuals and the clients they service.

### 2. *CWPIN Eligibility.*

Notwithstanding those who are already members of the *CapacityWare™ Practitioners International Network* (CWPIN), expanded certification and licensure will permit the growth of this network with basic assurances of qualifications among members. The CWPIN will be appropriately engaged in the decision-making that impacts future operations of the organization as a council of advisors. Neither licensure nor certification is required for CWPIN membership, although certification and/or licensure is highly desirable.

### ***3. Prerequisites.***

Interested individuals must be successful at facilitating adult group work. Skills may have been gained through a variety of experience, education or training, or by compatible facilitation and typology credentials. Successful experience is more important than academic achievement. We recognize that applicants may have been licensed or certified by other facilitation-based organizations. This may be an advantage, but often we have found that the competition between the applications of facilitation technologies leaves client-users confused and limits full engagement. Our outcome is to eliminate the confusion that emerges from competing technologies. On the surface, requirements to participate in basic facilitation training may appear redundant, but it has proven to be invaluable by producing a systemic understanding of the entire system of interconnected and synergistic change technology available.

### ***4. Financial Incentives.***

We recognize that having a "calling" to do this type of work is critical to success, but also recognize that financial reward is important. In this regard, both internal and external consulting candidates may have an interest in either or both of the following financial incentives.

**a. Generating Revenue.** Being able to offer consulting solutions using this Technology will generate professional fees that may not be otherwise available. Currently, professional fees for a basic two-hour workshop begin at \$350 and range to a full day workshop priced at \$2,500. We do not anticipate generating professional fees for those who undergo certification, but this does not preclude the candidate from making those arrangements.

**b. Organizational Savings.** Certification allows the individual's organization to purchase products and ancillary services at discount prices that range from 10% to 50% below suggested prices. Additionally, there are no charges for regularly scheduled training refresher events. Over time these savings can be considerable notwithstanding the financial value of capacity recovery or development that the Technology brings to those who use it.

### ***5. Potential Mentor Involvement.***

When an application is approved, a mentor will be assigned to the candidate. Casual involvement of the Mentor may be all that is necessary. If greater involvement is necessary, the Mentor may be entitled to professional fees. The Mentor in consultation with the candidate makes this decision. It is the prerogative of any Mentor to waive professional fees when employment considerations warrant it. An assigned Mentor may require fees for any significant amount of time devoted to the candidates' successful certification.

### ***6. Certification and Licensure Fees.***

Certification will require advanced payment by the candidate for certain products and services. A portion of the total Certification Fee may be deferred in a pay-as-you-go plan that allows the individual to repay Certification Fees during a period were the certification begins to generate revenue or incur cost savings that would have otherwise accrued.

**a. Application Fee.** A fee of \$100 is charged for the processing of any application for licensure or certification.

**b. Examination (and re-examination) Processing Fees.** A fee of \$10 is charged for the processing of each examination required for the certification and/or license sought. The current battery of examinations consists of no fewer than 10 examination items each in a combination of multiple choice, true-false, and essay. The remediation of any failed examination may incur Mentor Fees if substantial work is involved.

**c. Client Library Materials and Software Fees.** The purchase of Client Library materials is a pre-certification requirement for the category of credential (certificate or license) sought as outlined in paragraph 7 below. Notwithstanding that acquiring the full Client Library is recommended, volumes for specific needs, such as **RGB**, may be purchased selectively. Software may be used that is otherwise installed and made available for an authorized organization, or processing may be completed by **QWLC** as an interim measure. The purchase of software is not a requirement for initial or continued certification and/or licensure or continued credentials although it is encouraged, provided support assistance is acquired from **QWLC** or some other Licensed source.

**d. Ancillary Fees.** Other incidental fees may be required for certification and/or licensure. The rental of equipment or purchase of bulk handouts not provided by the client may be necessary, for example.

### ***7. Categories of Technology Certification and/or Licensure.***

Currently, five categories of certification and licensure may be awarded. Each category contains both Practitioner and Mastery certifications and licenses. The five categories are:

**a. Organizational Change System (OCS).** The Ten-stage OCS applied in a complex organization often requires consultation with a qualified practitioner

**b. CapacityWare™ Software.** Licensure in the use of **CapacityWare™** as a program management tool is available at the Workshop, Practitioner, and Mastery level. The purchase of **CapacityWare™** software is required for licensure.

**c. RGB.** The use of **RGB** Technology at Level 1 and Level 2 (Individual and Interpersonal/Team) are the primary applications. Additional certifications may be undertaken for Levels 3 through 5 once the Workshop Certification has been practiced for a period of 12 months.

**d. Residency (Embedded Facilitation Teams Course).** The workshop that prepares facilitators for engagement in organizations requires the completion of a five-day course (previously a 3-day Facilitation Course). A limited license is available to those who complete this course and demonstrate basic skills within 60 days. Licensure that enables the presentation of the Facilitation Teams course is also available.

**e. Diagnostic Interpretation, Strategy and Event Design Development.**

Individuals may become certified and/or licensed to interpret *CapacityWare*<sup>™</sup> products, develop strategies and create event designs based on diagnostic results.

**8. Acceptance of Professional Standards of Conduct.**

As part of the Application process, candidates are expected to read and commit to observance of Professional Standards of Conduct (See Attachment 4). Failure to follow these Standards and follow the recommendations contained in the Client Library may result in the revocation of Certification at any time for just cause, given adequate time to take corrective actions.

**9. Marketing and Clients.**

Applicants are expected to market services to potential clients so that their Practicum(s) are in an organization with which they have both familiarity and a sense of investment. *QWLC* may assist with marketing processes and materials, but will not be responsible for the procurement of client organizations for certification or licensure candidates.

**10. Waivers.**

With justification, a waiver may be granted for any requirement. *QWLC* will waive any requirement when the participant has adequately demonstrated and documented an understanding and application of the topic.

**a. On-line Study.** Any on-line study may be waived if adequate experience is demonstrated and documented.

**b. Examinations.** No waiver will be granted for an examination, however, a partial exception to the 80% requirement may be waived if adequate experience is demonstrated and documented.

**c. Residency.** Specific topic requirements within a residency may be waived if adequate experience is demonstrated and documented. The residency may not be fully waived.

**d. Practicums.** Any practicum may be waived if adequate experience is demonstrated and documented.

**C. Phase II, Application.**

The Application consists of the following::

**1. Personal Information.**

This will permit contact between us.

**2. *Connection or Introduction.***

We want to know how you were exposed to this opportunity.

**3. *Entrepreneurial Experience.***

Even when practiced in the most structured bureaucracy, this technology is best applied when the practitioner has had sufficient entrepreneurial experience. The information provided here gives us some idea of potential success as well as possible remedies.

**4. *Computer Literacy and Current Applications Package(s).***

This Technology requires the presence of Microsoft Office Professional Suite (Word, Excel, Access, Outlook, and PowerPoint). Applicants with a good grounding in these products are better able to meet the course requirements. If these products are not available on the same computer or network as *CapacityWare*<sup>TM</sup> software, it must be obtained and installed before our system can be used effectively.

**5. *Facilitation Experience.***

The successful application of this technology requires group dynamic experience, this information will allow us to best direct practicum experience as well as take full advantage of Residency options.

**6. *Mentor Selection.***

If there is a preference of a mentor assignment, that will certainly be taken into consideration. Mentors are assigned based on the greatest compatibility between the individual candidate and the skills, experience, and credentials of available mentors.

**7. *Potential Certification Use(s).***

In order to best direct and tailor the learning experiences, we must be aware of the potential uses to which this system will be applied. Provide as much information about the potential uses as possible.

**8. *Financial Arrangements.***

If the current financial option is too confining, we are certainly open to alternatives. We welcome any proposal that fits the individual candidates' limitations. If unable to accept a proposal, we will inform the candidate quickly so that alternatives can be explored further. Our objective is to NOT let reasonable financial arrangements prevent the potential expansion of this Technology.

### ***9. Support Arrangements.***

Potential applicants may either completely support their efforts with internal resources, or call upon **QWLC** or other authorized firms to support their activities on an interim basis or permanently. Support will include, but not be limited to Web services, data entry, data analysis, and report preparation, and client presentations.

### ***10. Professional Standards Acceptance.***

Our overall objective in requiring certification is that this Technology be applied in a recognizably uniform and effective way by all. We are not trying to generate too strict an application as much as maintain "signature" standards.

**Note:** An application to begin the certification and licensure process must be completed on-line. Go to [www.LTODI.com](http://www.LTODI.com), click on Services at the initial screen, then on Certification, and follow the instructions. Approval may be contingent upon satisfactory completion of the Residency requirement.

## **D. Phase III, Acquisition of *CapacityWare*<sup>TM</sup> Client Library.**

The Client Library must be acquired and used to complete the academic portion of the course and to follow as guidance while engaging in client activity. The Client Library will automatically be delivered upon receipt of acceptable financial arrangements. Initially, there are five volumes to the library, each in its own 3-ring binder. (See Attachment 2 for descriptions of this literature.) These volumes are augmented with numerous support materials.

### ***1. The Five Volume Client Library.***

The Client Library is delivered in five 3-ring binders. An Overview, Index, and Syllabus are also included with each volume.

### ***2. Extended Materials.***

Although the published 3-ring binders contain all core material, each Volume also contains Extended Materials that can only be accessed through the Internet. These Extended Materials include short articles for use in client publications during various stages of an intervention, workshop designs, and advanced use descriptions.

### ***3. Library Updates.***

The published Client Library contains passwords that enable the user to download updated materials that keep the library fresh with the latest Technology.

#### **4. Study Requirements.**

The majority of examination questions will be based on current library materials available in the Client Library or in Extended Materials available on-line.

### **E. Phase IV, Acquisition and Installation of *CapacityWare*<sup>TM</sup> Software.**

*CapacityWare*<sup>TM</sup> software must be acquired and installed on at least one computer that is available to the candidate during the certification and/or licensure process. Specific guidance for client Information Technology Professionals is available upon request.

#### **1. Microsoft Office Suite (Professional Version) Required.**

*QWLC* will only install *CapacityWare*<sup>TM</sup> on client systems where MS Office Suite is running. MS Office Suite is required to optimize the use of this software application.

#### **2. Stand-Alone Application.**

*CapacityWare*<sup>TM</sup> will run on a stand-alone PC computer.

#### **3. Network Application.**

*CapacityWare*<sup>TM</sup> will run on any file-server-based network.

### **F. Phase V, Completion of Residency Requirements.**

Of the 130 hours of instruction available in this course, 37 are best completed in a residency environment (See Attachment 3 for a list of the estimated hours required for both Residency and On-line requirements). Residency may be completed in a group setting, or it may be completed at *QWLC* or affiliate offices by engaging in an on-going project that allows the participant to learn the correct way to complete a specific client service discipline. *QWLC* periodically offers a 5-day Residency course of instruction in the fundamental application of this Technology. This course is a prerequisite for certification and licensure in any category.

#### **1. General.**

Although it is possible to complete all requirements on line, the preferred method is to complete a portion of all discipline requirements in residency. The clarity of the material is strikingly improved in the group environment under the supervision of a licensed facilitator. See Attachment 3.

#### **a. Residency and Limited Certification.**

The completion of Residency will allow a limited one-year certificate to be granted so that the participant can begin applying this Technology while satisfactorily completing ancillary non-resident requirements.

***b. Residency versus On-line Requirements.***

All requirements not identified as Residency must be completed on-line within the specified period (normally one-year from application approval).

***2. Specific Residency Discipline.***

There are currently four disciplines listed below that comprise the bulk of the *CapacityWare*<sup>TM</sup> Technology. All disciplines have a concentration of the application of the Technology as well as an immersion in the software support for the various processes. Course materials are available for Facilitation Teams, and the RGB Certification.

***a. Residency Phase I, Facilitation Teams (See Attachment 5 - 3 Days).***

Facilitation Teams is a minor concentration on group facilitation techniques, and a major concentration on the management of teams of facilitators supported by *CapacityWare*<sup>TM</sup> Software.

***b. Residency Phase II, RGB Certification (See Attachment 6 - 5 Days).***

RGB Facilitation prepares participants to apply the RGB Technology in their client organizations along with a number of related models as part of the Progressive Design architecture.

***c. Residency Phase III, CapacityWare<sup>TM</sup> Administrator (5 Days).***

The *CapacityWare*<sup>TM</sup> Administrator course prepares participants to be the resident expert on *CapacityWare*<sup>TM</sup> Software application in the full range of product/service offerings.

***d. Residency Phase IV, Classical Organization Development Manager (5***

***Days).*** Those who are or aspire to be manages classical organization development organizations designed to recover lost capacity or develop new capacity in complex organizations.

**G. Phase VI, Completion of On-line Requirements.**

Participants will be provided with on-line examination addresses and appropriate passwords. When examinations are completed successfully, the participant will be provided with password protected practicum preparation materials. Examination scores of at least 80% must be achieved before continuation is permitted.

***1. Current Topic Material Downloads.***

Once the original library has been purchased, all updated materials will be available for download at any time. Each download will require a password. Passwords are provided each participant at the time of Client Library delivery.

**2. *Practicum Material Downloads.***

All instructions and materials needed to complete any practicum will be available on-line or by request.

**3. *Video Learning Materials.***

Video materials needed for the completion of any requirement will be available on-line.

**4. *Examination Formats.***

Two examination formats are used: a ten-item multiple-choice exam (Workshop Level), and a five-item essay examination (Practitioner Level). At the Workshop Level, the same examination may be used for both pre-residency and post residency.

**5. *Pass Rate Calculated by each Category (Client Library volume).***

An 80% is considered passing for each Category. Any examination can be retaken one time. The final grade will be an average of both examinations.

**6. *Open Book.***

All examinations are open-book. Participants may use published references, notes, and classmates as resources in taking any examination.

**7. *Best Answer.***

In some cases, more than one answer to an examination may be technically correct. The "best" answer will be graded as correct.

**8. *Password Protected Transcript.***

Each participant will have an individual password protected transcript available on-line. This transcript will have all examination results posted within 5 days of submission. Participants may request changes to assigned passwords at any time via e-mail.

**9. *On-line Examination Addresses.***

On-line examinations can be reached from several convenient locations. Addresses will be provided upon approval of application and distribution of Client Library materials.

## **H. Phase VII, Preparation for, Conduct of, and Evaluation of Practicum(s).**

This phase is the experiential portion of the certification process. The academic requirements must be satisfied before embarking on a practicum.. The practicum provides a participant with a

"hands on" task to complete at their own pace and submit results for examination. The practicum recognizes that academic excellence must be paralleled with practical ability to perform certain tasks successfully. A two-hour **RGB** event-based practicum is the minimum time required for certification. Participants must be legitimate consultants at an event where expectations are such that learning this new Technology will improve individual and/or organization performance. Certification and/or licensure will require evidence of successful completion of the practicum. (Attachment 3 identifies the topics within which Practicums are required.) The Practicum consists of the following components:

***1. Event Production Guidelines and Resources.***

Participants will be given a password protected reference that will enable them to prepare for the Practicum Event (a live demonstration with legitimate participants that exhibits what they have learned). Event Production Guidelines and other event-based resources such as detailed agendas and workshop materials may have an examination to be used as a yardstick for successful performance. Continuation will depend upon the candidate/participant comfort level.

***2. Identifying a Practicum Client.***

The participant may be required to acquire a client for this practicum. In some cases, however, a client will be identified and provided for the candidate. Designated Mentors may arrange for practicum clients as a means of perpetuating the "learning practice" style in much the same tradition as a "learning hospital" prepares physicians for real-life practice.

***3. Supporting Team Members.***

"Assistants" helping with the behind the scene workshop requirements need have no special preparations beyond those provided by the participant. When possible, those who may aspire to become certified will be used when available.

***4. Team Lead.***

The candidate will be the Team Lead in all respects. The details for this are identified in Team Operating Guidelines (See Facilitation Teams, Tab 1) and Event Production (See Facilitation Teams, Tab 3). The successful completion of the Event rests entirely with the participant.

***5. Examinations.***

Examination results will determine the participants' eligibility to proceed to the On-line Interactive Practicum Preparation stage. A marginally successful Practicum Event may be swayed by Examination results.

***6. Team Clinic.***

A Team Clinic is completed after the conclusion of the Event. The candidate is responsible for including anyone on the Event Team in an analysis of "What Went Well" and "What Would We

Do Differently" given another opportunity. Certification expects that the Practicum Event will be successful but does not expect perfection. The Clinic provides the Lead and others an opportunity to learn. Certification will depend upon the quality and depth of learning as demonstrated by the Clinic documentation (provided on-line within 48 hours).

### ***7. Event Participant Feedback.***

The most important feedback concerning the success of the Practicum Event will be the participant feedback. The prescribed form must be used. Participants may complete the feedback immediately at the end of the workshop (the Lead will collect the feedback in sealed envelopes and send them directly to an address provided by the assigned Mentor or be completed on-line within 48 hours).

### ***8. Observation or Video Production.***

Evidence of a successful demonstration may take the form of in-room observation of an appropriate event, or a video production focusing on the candidate for certification and/or licensure. This evidence must exhibit the candidates style.

## **I. Phase VIII, Individual Certification.**

Certification can be expected within 3 to 5 days following the receipt of all post-Practicum Event documentation. Certification will consist of a suitable plaque that displays a Certificate, an appropriate listing on the LTODI Web Site attesting to the Certification, and the extension of written privileges. Certification entitles the individual the use of software and/or copyrighted materials with clients to be used incidental to their assigned work. Certification will be awarded at two progressive professional grades (Workshop and Practitioner):

### ***1. Workshop.***

When certified at the Workshop level, the certificate holder must agree to use only templates approved for Workshop level. The use of approved templates and the successful completion of continuing requirements may result in certification at the Practitioner level.

**a. Facilitation Level 1.** Helping people understand and (ideally) accept a pre-determined point-of-view.

**b. Facilitation Level 2.** Helping people develop action plans to overcome a pre-defined problem.

### ***2. Practitioner.***

The Practitioner level certification will be awarded to individuals who have completed the minimum of fifteen successful boilerplate presentation requirements and who have received the favorable recommendation of an assigned mentor to progress to the Practitioner level. Advanced

topics for study and successful application include the following category ratings Organization Change System; *CapacityWare*<sup>TM</sup> Software; **RGB** Advanced Topics (Matching Tasks with Talent guided coaching under the supervision of an assigned mentor); Advanced Facilitation Teams technology; and Diagnostic Interpretation, Design, and Implementation.

**a. Facilitation Level 3.** Helping people solve a problem when presented with symptomatic data.

**b. Facilitation Level 4.** Helping people find and fix multiple systemically related problems across boundaries along core process lines.

### ***3. Workshop, and Practitioner Certification.***

The initial Workshop Certificate is for a term of one year. During that time, the certified individual must document the recurring use of the Technology to such an extent that continued use will not likely result in a decay of skills, rather in an enhancement of skills.

### ***4. Privileges Extended to those who are Certified.***

The following privileges are extended to those who become certified.

**a. Eligibility for *CapacityWare*<sup>TM</sup> Practitioners International Network (CWPIN) membership.**

**b. Local Reproduction of specific Workshop Handout and Pre/Post Reading Materials** (this provision specifically excludes the reproduction and distribution of any and all substantial materials used for any process that is the same or similar to licensure and/or certification). The intention is to eliminate potential competition between licensed individuals and those certified to conduct events leading to licensure or certification.

**c. Current Discount on all LTODI Products and Services.**

**d. Conditional Use of the Technology for Which Certified.**

## **J. Phase IX, Team Lead License.**

(This phase pertains only to those who have completed the requirements for Certification.)

### ***1. Mastery.***

The Mastery level license will be awarded to individuals who have exhibited successful sustained experience at the Practitioner level. Mastery level entitles the license holder to design interventions and workshops, license *CapacityWare*<sup>TM</sup> software and literature, and mentor others applying for certification and/or licensure.

**Facilitation Level 5.** Helping people continuously navigate multiple interdependent organizational cultures to achieve organizational outcomes at increasingly higher levels of capacity.

License will be extended to those individuals who have demonstrated sufficient current competence in leading a team of facilitators to transfer to others the needed skills to successfully complete certification requirements for the type of certificate sought. An extension of license permits the licensed individual to certify others at, but not exceeding, their license level of demonstrated competence.

### ***2. Mastery License.***

A License is granted for a term of one year. During that time, the certified individual must document the recurring use of the Technology to such an extent that continued use will not likely result in a decay of skills, rather in an enhancement of skills. Licensure at any specific level will enable the individual to license others at one level below their certification. Two individuals who have sustained Mastery level competencies for a minimum of three consecutive years must accomplish licensure at the Mastery level.

### ***3. Privileges Extended to Those Licensed as Team Leads.***

The following privileges are extended to those who become certified.

- a. Eligibility for *CapacityWare*<sup>™</sup> Practitioners International Network (CWPIN) membership.**
- b. Current Discount on all LTODI Products and Services.**
- c. Conditional Use of the Technology for Which Certified, for the production of all licensed and certified events authorized.**
- d. Certified Team Leads will certify to *QWLC*, individuals applying for licensure as having met the demonstrated competencies for Technology-type licensure.**

## **K. Phase X, Maintaining Credentials.**

Both a license and a certificate are credentials that must be renewed, unless otherwise specified in the granting document, every two years. The standards of performance are outlined in various provisions of the Client Library, and available Event Designs.

### ***1. Certificate Renewal.***

Following the initial certification period, a renewal process similar to that outlined in paragraph F above will extend certification for a prescribed period. At any time the certified

individual may be required to submit evaluation materials as proof of continued competency and uniformity.

**2. *License Renewal.***

Following the initial certification period, a renewal process similar to that outlined above will extend a license for an indefinite period. At any time the licensed individual may be required to submit evaluation materials as proof of continued competency and uniformity.

## Certification and Licensure Recommended Activity Sequence and Investment.

Phases	Activity	Option A Package Cost	Option B
I. Exploration (optional)	Monitor a scheduled event. Read/view pertinent materials. Interview users. Request and investigate references.	None	None
II. Application	Read and accept conditions. Complete and submit required application. Acquire approval with stipulations (if any). Assignment of a mentor. Set up site files and passwords.	Included	\$ 100
III. Acquire Library	Select Library Requirements Obtain Internet Passwords	\$795	\$795
IV. Acquire Software	Determine IT compatibility. Determine site configuration. Arrange for software Installation. Purchase "license/counters" - optional.	\$ 895	\$ 1,695
V. Residency Requirement	Phase I, Facilitation Teams Phase II, RGB Certification Phase III, <i>CapacityWare</i> <sup>TM</sup> Administrator Phase IV, Classical Organization Development Manager	\$ 895 and/or \$ 995 and/or \$ 795 and/or \$ 1,295.	\$ 895 and/or \$ 995 and/or \$ 795 and/or \$ 1,295.
VI. Examination(s)	Complete pre- and post-application exams. Score at least 80% on Library volume.	Included	\$10/exam (up to \$550)
VII. Practicum	Schedule practicum event. Complete pre-practicum requirements. Conduct Practicum. Complete post-practicum requirements.	\$ 250/day 1-day Minimum.	\$ 250/day 1-day Minimum.
VIII. Certification	Obtain a specific certificate.	Included	Included
IX. Licensure	Obtain a License to certify others.	Separate	Separate
X. Maintaining Credentials	Document current and frequent applications.	Separate	Separate
	<b>Total</b>	<b>\$ 2,935</b>	<b>\$ 4,385</b>

*Practicum completion may be satisfied with video evidence of the event rather than presence of a mentor. Any requirement is subject to waiver. Certification pertains to the rights and privileges extended to a qualified individual with regard to the use and practice of copyright materials. Licensure is the granting of certification authority to a team lead who will prepare others for operations in accordance with strict standards of performance.*

## Literature Descriptions

**1. Organization Change System (OCS) Manual (47,580 words with 40 Attachment).** The OCS is a "big picture" of the 10-Stage Cycle of organizational change management that will result in enhanced cultural capacity for an organization. The Stages are presented in the appropriate chronological sequence to achieve the fastest and most stable enhancements. At each Stage the system is tailored for the specific client organization. *The "who, what, when, where, why, and how" of this system are of equal importance. Following the right process with the wrong people involved will produce less-than-optimum results, for example.*

**2. CapacityWare™ Administration (CWA) Manual (17,990 words with 27 Attachments).** The software that provides the specific structure needed to optimize change initiatives is *CapacityWare™*. This software product helps manage the efforts of all those involved in the change effort to enhance a coordinated (effective and efficient) approach. Although many may have access to the software, one individual will be the central "owner" of *CapacityWare™*. This individual is often referred to as the *CapacityWare™* Administrator.

**3. RGB WorkStyle Preference (RGB) Manual (17,513 words with 10 Attachments).** There are five levels of application for the **RGB** Technology that measures and develops individual, team, workgroup, network, and organizational performance. The results of **RGB** WorkStyle Preference Inventories fosters the recovery of lost capacity or development of new capacity based on the tangible value of the talent people add to their discretionary work.

**4. Facilitation Teams (FT) Manual (29,893 words with 28 Attachments).** Members of teams chartered by the organization's leadership work to increase capacity so that the organization's purpose is achieved. This foundational publication provides the guidance required for that work to be the highest possible influence on developing or recovering workforce capacity. It includes techniques for supervisors, managers, facilitators, and members of the workforce to achieve those higher levels faster with less effort. It is not a substitute for developing traditional facilitator skills.

**5. Diagnostic Report and Follow-through (DF) Manual (18,612 words with 16 Attachments).** Each cycle of the 10-Stage Organization Change System will produce diagnostic documents as well as follow-through documentation that allows key decision-makers to know what actions are being taken to correct capacity deficiencies. These manuals are distributed initially to pre-identified individuals across the organization along with diagnostic results (usually workforce survey results). As corrective actions are taken, additional documents are added to the Manual that provides an ongoing accounting for progress (or lack thereof).

\*word count excludes Attachments, Illustrations and Internet resources.

## *CapacityWare™* Recovery and Development Curriculum

**To be completed in a tailored combination of Residency\* and On-line requirements\*\*.**

Part	Bk	Tab	Description	SQ	Time	PR	R/O
Organization Change System	1	Cvr		4	1		O
	1	1	Preliminary Orientations and Clarity Meetings	18	2		R4
	1	2	Instrument Package Development and Distribution	21	3		R1
	1	3	Data Collection, Data Entry, and Validation	23	2	Yes	R3
	1	4	Analysis, Synthesis, and Report Development	26	4	Yes	R3
	1	5	Organization Feedback and Team Recruitment	32	3		R4
	1	6	Coaching Lab and Planning Session	37	2	Yes	R2
	1	7	Team Formation and Team Culture Development	41	3	Yes	R1
	1	8	Development of Recommendation Design & Approval/Adoption	43	2	Yes	R1
	1	9	Implementation and Measurement	44	2		R3
	1	10	Evaluation, Adjustment and Closure	50	2 (25)		R3
CapacityWare™	2	Cvr		3	1		O
	2	1	Navigating the Main Menu	11	2		R2
	2	2	Managing Respondent Data	12	3		R2
	2	3	Creating Instruments	14	3	Yes	R1
	2	4	Engaging Best Practices	22	4	Yes	R1
	2	5	Processing Instruments	15	1		R2
	2	6	Displaying Results	16	3		R2
	2	7	Managing Activity Records	13	4		R2
	2	8	Working with Financials	36	2	Yes	R3
	2	9	Running Reports	25	2		R2
2	10	Connecting with Web Resources	6	1 (25)	Yes	R1	
RGB WorkStyle Preferences	3	Cvr		1	1		O
	3	1	Individual Predisposition	8	3	Yes	R2
	3	2	Interpersonal Dynamics	19	4		R4
	3	3	Matching Tasks with Talent	33	4	Yes	R3
	3	4	Developing Organizational Culture	45	4		R4
3	5	Measuring and Monitoring RGB Organizational Implications	49	5 (20)		R3	
Facilitation	4	Cvr		2	1		O
	4	1	Structure	9	1		R1
	4	2	Models	7	8		R2
	4	3	Event Production	17	3		R1
	4	4	Record Keeping	34	2	Yes	R1
	4	5	Graphics	31	4		R2
	4	6	Exchanges	24	2		R4
	4	7	Processes	40	6	Yes	R4
	4	8	Coaching	35	3		R4
	4	9	Group	20	6		R2
4	10	Culture	48	5 (40)		R4	
Diagnostic Report and Follow-through	5	Cvr		5	1		O
	5	1	History and Documentation	27	1		R1
	5	2	Systemic Perspective	28	2		R3
	5	3	Trend Rankings	29	1	Yes	R3
	5	4	Symptomatic Item Data and Comments	30	2		R3
	5	5	Coaching Lab and Planning Initiatives	38	3		R4
	5	6	Strategy Development	39	4		R4
	5	7	Team Activity	42	1		R1
	5	8	Metric Results	46	1		R3
	5	9	Return-on-Investment	47	2	Yes	R3
5	10	Client History and Remediation Technology (C.H.A.R.T.)	10	3 (20)		R3	
<b>Total</b>	<b>5</b>	<b>50</b>			<b>135</b>	<b>15</b>	<b>R1-24 R2-38 R3-32 R4-36 O-5</b>

\*O = Online, R1 = Facilitation Teams, R2 = RGB Residency, R3 = *CapacityWare*<sup>™</sup> Administrator, R4 = OD Manager

\*\*Requirements subject to both waiver and variation based on successful experience, practicum, and exam results.

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## In Sequence Order

Bk	Tab	Description	SQ	Time	PR	R/O
3	Cvr	RGB	1	1		O
4	Cvr	Facilitation Teams	2	1		O
2	Cvr	CapacityWare	3	1		O
1	Cvr	Ten-Stage	4	1		O
5	Cvr	Diagnostic Report and Follow-through	5	1		O
2	10	Connecting with Web Resources	6	1	Yes	R1
4	2	Models	7	8		R2
3	1	Individual Predisposition	8	3	Yes	R2
4	1	Structure	9	1		R1
5	10	Client History and Remediation Technology (C.H.A.R.T.)	10	3		R3
2	1	Navigating the Main Menu	11	2		R2
2	2	Managing Respondent Data	12	3		R2
2	7	Managing Activity Records	13	4		R2
2	3	Creating Instruments	14	3	Yes	R1
2	5	Processing Instruments	15	1		R2
2	6	Displaying Results	16	3		R2
4	3	Event Production	17	3		R1
1	1	Preliminary Orientations and Clarity Meetings	18	2		R4
3	2	Interpersonal Dynamics	19	4		R4
4	9	Group	20	6		R2
1	2	Instrument Package Development and Distribution	21	3		R1
2	4	Engaging Best Practices	22	4	Yes	R1
1	3	Data Collection, Data Entry, and Validation	23	2	Yes	R3
4	6	Exchanges	24	2		R3
2	9	Running Reports	25	2		R2
1	4	Analysis, Synthesis, and Report Development	26	4	Yes	R3
5	1	History and Documentation	27	1		R1
5	2	Systemic Perspective	28	2		R3
5	3	Trend Rankings	29	1	Yes	R3
5	4	Symptomatic Item Data and Comments	30	2		R3
4	5	Graphics	31	4		R2
1	5	Organization Feedback and Team Recruitment	32	3		R4
3	3	Matching Tasks with Talent	33	4	Yes	R3
4	4	Record Keeping	34	2	Yes	R1
4	8	Coaching	35	3		R4
2	8	Working with Financials	36	2	Yes	R3
1	6	Coaching Lab and Planning Session	37	2	Yes	R2
5	5	Coaching Lab and Planning Initiatives	38	3		R4
5	6	Strategy Development	39	4		R4
4	7	Processes	40	6	Yes	R4
1	7	Team Formation and Team Culture Development	41	3	Yes	R1
5	7	Team Activity	42	1		R1
1	8	Development of Recommendation Design & Approval/Adoption	43	2	Yes	R1
1	9	Implementation and Measurement	44	2		R3
3	4	Developing Organizational Culture	45	4		R4
5	8	Metric Results	46	1		R3
5	9	Return-on-Investment	47	2	Yes	R3
4	10	Culture	48	5		R4
3	5	Measuring and Monitoring RGB Organizational Implications	49	5		R3
1	10	Evaluation, Adjustment and Closure	50	2		R3
5	50			135	15	R1-24 R2-38 R3-32 R4-36 O-5

## **Professional Standards of Conduct**

**CWPIN membership subscribes to and champions the following professional standards of conduct at three levels:**

### **Public Confidence and Trust**

#### ***1. Professional Attitude and Behavior***

We will demonstrate attitudes and behavior toward the public, our clients, and toward each other that reinforces our commitment to superior service and high-quality productive relationships. We will seek to be a model of professional conduct toward which others in our profession aspire.

#### ***2. Professional Contribution***

We will help those we serve to improve their organizations by providing sound advice and assistance. We will recognize our limitations within our scope of expertise and responsibly seek and refer to the advice of others when appropriate.

#### ***3. Treatment of Information***

We will treat all client information confidentially and thereby maintain the trust placed with us by clients.

#### ***4. Advertising***

We will make realistic claims concerning our capabilities, and make good our guarantees.

#### ***5. Conflict of Interest***

We will resolve any appearance of conflict of interest to the satisfaction of our clients.

#### ***6. References***

We will only use client references when permission has been obtained from the client.

## **Client Service Commitment**

### ***1. Understanding of Client Need and Anticipated Benefits***

We will make every reasonable effort to understand our client condition and need -- from the client perspective -- and judge our success by the expectations established by our clients.

### ***2. Confidentiality and Anonymity***

We will treat all information collected during client audits and assessments with confidentiality and anonymity. We will report information to the client directly, and without distortion. We will report information so as to protect the identity of those who have provided it and respect their need for confidentiality and anonymity.

### ***3. Independence and Conditions of Service***

We will enter no agreement with anyone other than our client that will influence our ability to render superior service to that client. We will fully disclose our conditions of service to our clients at all times and inform them of any circumstances which will alter those conditions adversely.

### ***4. Agreement Regarding Scope of Involvement and Charges***

We will make agreements regarding the scope of our involvement with a client, and the charges we anticipate in exchange for that involvement. We will not exceed the scope of that agreement without client consent.

### ***5. Transfer of Knowledge***

We will seek ways to transfer the knowledge we use in helping a client to the client organization so as to continually increase competence and capabilities for the purpose of building ownership and reducing client dependency.

### ***6. Qualified Personnel Assignments and Applications***

We will engage only the most qualified and available of our associates and affiliates in applications directly designed to improve client performance, productivity, and profitability within the scope of our client agreements.

***7. Sufficiency of Diagnostics and Practicality of Solutions***

We will use the latest and most effective techniques available to us in client diagnostic functions, and recommend and assist in the implementation of only the most practical of solutions. In so doing, we will consider the client's potential return on investment in our services.

## **Practitioner Relationships**

### ***1. Knowledge Sharing and Professional Development***

For the purpose of improving customer service and public confidence, we will freely share generic knowledge among members of our affiliation network and among members of our profession.

### ***2. Treatment of Proprietary Materials and Techniques***

We will acknowledge and respect the rights of those who create materials and innovative processes for our use in helping clients improve their performance, productivity, and profitability. We will only use this technology within the limits of our license or certificate.

### ***3. Associations with other Professional Consultants***

We will energetically pursue a variety of associations with members of our profession and those closely associated with our profession for the purpose of improving our ability to serve the needs of our clients.

### ***4. Uniform Application of our Technology***

We will uniformly apply our Technology so as to significantly contribute to client improvements in quality and consistency.

### ***5. An Inquiring Culture Dedicated to Continuous Improvement***

We will seek methods and techniques to reward each other for inquiries that result in continuous improvements to our own organization, ultimately benefiting ourselves and our clients.

### ***6. Consistent Change***

We will be responsive to the needs of the individual, while planning meaningful change that is best for the whole.

Attachment 5

## Residency, Phase I, Facilitation Teams, Syllabus

1. This "systemic perspective" presentation of Facilitation Teams incorporates a structured approach to understanding facilitation as a cultural capacity change methodology that incorporates *CapacityWare*<sup>TM</sup> software and literature as essential supporting elements.
2. Group time will be devoted to topics of the highest priority to those attending, while lower priority topics not covered in the group environment each day will be assigned as "homework" and clarified, as needed, during the subsequent morning before the regular agenda resumes.
3. The training facility (Point Plaza Hotel and Conference Center, Newport News, Virginia) has wireless Internet connectivity that permits the effective use of portable computers during the session. Bring your portable computer if you have one. It is always an advantage to have *CapacityWare*<sup>TM</sup> installed prior to the Residency. The course blends software use each day to illustrate how the "change system" works in concert with technology.
4. Times indicated on any agenda include breaks. Beverages are available in the room.
5. Start time is 8:30am. The day ends at approximately 4:30pm. Lunch is 1 hour at approximately 11:45am. A restaurant is available at the training site.
6. The Agenda format is a potential topic sequence but is not a rigid one. Topics will be discussed in the order in which participant readiness for the material is judged. The Residency Syllabus - Agenda is tailored to meet the needs of the participants as well as the needs of the *CapacityWare*<sup>TM</sup> Practitioners International Network.
7. Roles are assigned to participants for each topic as a means of creating empathy. Any role not otherwise recommended is a course participant role.
8. During the sessions, participants are encouraged to write inclusive chart numbers in the last agenda column to aid in finding topics of interest when transcribed charts are made available.
9. References are made to the Client Technology Library which, if not distributed before the course begins, will be distributed during the first morning. All course materials are available online. Updates to course materials will be posted online as updates are made and announced in "The RGB Way!" - the monthly e-newsletter distributed.
10. Of the fifty online examinations, only 11 must be completed as a result of the Residency within one month for Workshop-level RGB Certification. An observed RGB practicum of two hours duration (template provided) must be completed within six months.
11. A listing in the *CWPIN* web site will be made upon completion of all course requirements.

12. Although the course is flexible enough to permit some "absences" because of pressing organizational needs, we have created a start-on-time and end-on-time culture that we ask all to respect. Absences are best accommodated during the appropriate scheduled breaks. It is expected that participants will be in attendance at least 85% of the scheduled time and make up time absent with a class "buddy" of their own selection.

13. Completion of the Facilitation Teams course is a desirable prerequisite for Residency.

14. A Residency Application is required for attendance. The information on the Application is used to tailor the actual course agenda.

<b>Day 1 - AM</b>
<p><b>1. Residency Setup</b> Provide a description of what will happen during Residency.</p> <ul style="list-style-type: none"> <li>- <b>3-Day agenda overview</b> - Will track a pseudo-client through a change cycle.</li> <li>- <b>Confidentiality</b> - Speak about client conditions in this environment - repeat nothing.</li> <li>- <b>Roles</b> - Defined to develop empathy with teams and client positions.</li> <li>- <b>Homework</b> - Follow-through each day and prepare for the next day.</li> <li>- <b>Missed-time makeup</b> - Participants responsible for their own learning.</li> <li>- <b>Facility</b> - Quick virtual tour of facility.</li> <li>- <b>Residency versus on-line</b> - Explanation of face-to-face versus Internet activity.</li> <li>- <b>EDU catalog</b> - Express the desire to share the current national catalog listing.</li> <li>- <b>Signature consistency</b> - Create the single-image signature to foster client comfort.</li> <li>- <b>Library history</b> - Provide a brief history of the 5-volume client library.</li> <li>- <b>Web visits</b> - Demonstrate the connectivity to Web resources through <i>CapacityWare</i><sup>TM</sup>.</li> <li>- <b>35-year timeline</b> - Provide planning insights that have impacted the <i>CWPIN</i>.</li> <li>- <b>Certification versus Licensure</b> - Explain the differences between the two options.</li> <li>- <b>Checkin's - ...out's - and ...up's!</b> - Explain the "CHECKS" that help develop culture.</li> <li>- <b>Social Opportunities</b> - Offer the option to gather socially one evening.</li> <li>- <b>Breaks</b> - Breaks are expected once each morning and afternoon at minimum.</li> <li>- <b>Interact!</b> - Participants will get out of this event what they put into it - Guaranteed!</li> <li>- <b>Types of Residency</b> - The options are: <u>Content</u> intense, <u>Network Development</u> intense.</li> </ul> <p>(Note: order will be modified to accommodate late arrivals on day 1 only)</p>
<p><b>2. Group Context and Maintenance.</b> The Lead Facilitator will cover the agenda, and facilitate introductions among participants. A <i>CapacityWare</i><sup>TM</sup> demonstration will include an examination of the report "Event Roster."</p> <p style="text-align: center;">Web Exercise: <a href="http://www.LTODI.com/rgbinventory.htm">www.LTODI.com/rgbinventory.htm</a> (complete in advance) Exercise: RGB Introductions w/Individual Profile and Interpretation Guide</p>
<p><b>3. Cultural Capacity Development System.</b> In order to place Team Facilitation in context with large organizational change efforts, the group will learn about the ten elements of the CCDS. Focus will be on how each element of CCDS contributes to the Team Facilitation process, and</p>

how Team Facilitation contributes to overall CCDS outcomes. *CapacityWare*<sup>TM</sup> demonstration will include the "Presentation Links" module.

Web Exercise: [www.LTODI.com/certification\\_programs.htm](http://www.LTODI.com/certification_programs.htm)  
(complete CCDS reading and written test "FL1")

CCDS Model

Exercise: Team Selection

#### 4.

**Pre-event Planning.** Careful creation and implementation of designed events arranged in sequence to produce desired cultural capacity change is essential. There are six steps in the event production process, the first and most critical being "Pre-event Planning."

*CapacityWare*<sup>TM</sup> demonstration will include initializing an "Event" and doing some fundamental planning using the event module.

RGB Technology Model

OMR2 Model

Exercise: Facilitation Topic Selection

Exercise: CW Update

#### 5.

**Internal Missions.** Three internal missions that support the Team Facilitation environment are: Business Routines, Human Resources Development, and Marketing. Team Facilitators will be required to interface with each of these internal missions in order to be successful.

*CapacityWare*<sup>TM</sup> demonstration will include the "Requirements" and "Financial - Invoicing/Charge" elements of the event module.

Systems

UHS Model

#### 6.

**Role: Expert Advisor Re: Cultural Capacity.** The Lead Facilitator will help participants draw connections between an organizations cultural capacity and the Smart Tailoring Band structure.

This Smart Tailoring process aids in the design of remediation strategies. *CapacityWare*<sup>TM</sup> demonstrations will include both the "Financial - Loss Estimator" and "Quality of WorkLife Index Summary" Reports.

Smart Tailoring

Work Model

Game: Spoons

### Day 1 - PM

Exercise: Check-in

#### 7.

**Change Management Structure.** Team Facilitation occurs within a context of change management structure and reporting relationships that must be understood if facilitation

methodologies are to be successful. *CapacityWare*<sup>TM</sup> demonstrations will include one or more "Cohesion Index" examinations and dialog concerning the implications of those results.

Leadership and Management Paradox Model

**8.**

**Pre-event Production.** Prior to every event, the Facilitation Team must consider the availability of supporting literature and equipment to achieve success. Pre-event production regimens include both the selection and reproduction of existing materials and the potential research, creation and reproduction of new materials. *CapacityWare*<sup>TM</sup> demonstrations will include the "Requirements" element of the event module and the use of the "Quote" files to select and/or create needed materials.

Exercise: Facilitate Quote Dialog and Add Quote

Exercise: CW Update

**9.**

**External Mission: Technology.** The *CapacityWare*<sup>TM</sup> system incorporates two forms of technology: supporting software and guiding literature. Understanding how to optimize the use of these two technologies can mean the difference between success and marginal performance for a Facilitation Team. The literature connectivity links in *CapacityWare*<sup>TM</sup> will be demonstrated.

**10.**

**Role: CapacityWare<sup>TM</sup> Administrator.** Team Facilitators will often fill the role of *CapacityWare*<sup>TM</sup> Administrator and must know how to use *CapacityWare*<sup>TM</sup> to optimize their facilitation roles. A *CapacityWare*<sup>TM</sup> demonstration will include "Survey" creation, "Survey" editing, "Survey Item" on/off options, as well as practices surrounding "Embedded Survey" administration.

## Day 2 - AM

Exercise: Check-in

**11.**

**Graphic Facilitation.** Approximately 60% of the population is visual - that is to say they access memory through pictures. Graphics are an essential technique to assure greater effectiveness from the group environment. Participants will practice their graphic skills and will learn the implications of colors and shapes in the *CapacityWare*<sup>TM</sup> environment. *CapacityWare*<sup>TM</sup> demonstrations will include the colors and shapes of data reported by the system in RGB and UHS format.

Visual, Auditory, and Kinesthetic Model

Exercise: Colors, Shapes, and Group Templates

**12.**

**Mission: Diagnostics.** Team Facilitation is normally engaged following a data collection effort that includes either or both RGB and UHS Technologies. Under ideal conditions it will also involve the regular application of Metric data collection efforts. *CapacityWare*<sup>TM</sup> demonstrations will include a review of Reports, such as "Demographic Count" and follow-on UHS views of significant data as a prelude to Report Writing and Coaching Lab events.

Exercise: Data Interpretation

**13.**

**Role: Group Facilitator.** Team Facilitation focuses, at its core, on helping small groups contribute collectively to a major cultural capacity change effort. The "tracking" of group participation and performance is a critical element in determining success. *CapacityWare*<sup>TM</sup> demonstrations will include event module "Invitations" and "Attendance" as well as review and release of "Participation Records" to the organization population as an intervention to stimulate involvement.

Ashby's Law

Exercise: Team Facilitation/Clinic

**14.**

**Transition to the Event Environment.** Most events occur outside the Facilitators normal workspace. Here, the Lead Facilitator will discuss the implications of creating an atmosphere within which teams can "gel" and do their best work. The *CapacityWare*<sup>TM</sup> demonstration will focus on the "Location" element of the event module, as well as the "Event Record."

Exercise: CW Update

## Day 2 - PM

Check-in

**15.**

**Mission: Consulting.** The consulting process is a clear progression from an "intuitive" sense that "Something is wrong here", to a concrete series of potential steps that will be taken to remedy the condition. Team Facilitators must know that they may be facilitating improvement by way of this larger condition or facilitating one small element of the larger condition. They must also be aware of a phenomena call the "Situational Pulse." The *CapacityWare*<sup>TM</sup> demonstration will include an examination of the "Financials - ROI" module.

Basic Model

**16.**

**Role: Coaching.** Facilitation (helping) may be accomplished in a one-on-one or one-on-few environment rather than in a team or group situation. Coaching helps people understand viable alternative perspectives apart from the one held by the person being coached so that improved

performance of the individual within the context of the group can be achieved. *CapacityWare*<sup>TM</sup> demonstrations will include RGB and UHS comparisons between individuals and other individuals or demographically identifiable groups.

Beliefs, Rules, Evidence, and Stories Model

**17.**

**Conduct the Event.** The actual conduct of a designed event, whether it is 15 minutes or several days in duration, will be treated here. A planning model, OMR2 will be used to help plan the event along with a "clinic" technique to help determine its success. *CapacityWare*<sup>TM</sup> demonstrations will include the use of the event module "Lead Plan" and "Participant Feedback" elements.

Inclusion, Control, and Openness  
Exercise: Team Facilitation/Clinic

**18.**

**Group Facilitation.** There are three or four potential concurrent roles that contribute to effective group facilitation efforts; Lead, Anchor, In-room Support, and Facility Support. In addition, there are other supporting roles outside the facilitated environment that also impact success. *CapacityWare*<sup>TM</sup> demonstrations will include the "Team" selection and assignments elements of the event module as well as pre-event planning and post-event follow-through activities.

Exercise: Team Facilitation/Clinic

### Day 3 - AM

Check-in

**19.**

**Transition from the Event Environment.** At the conclusion of the event, the Facilitation Team must make an effective transition from the facilitation environment to a return to normal duties. The Lead Facilitator will cover topics of interest within this context - especially the topic of event closure. *CapacityWare*<sup>TM</sup> demonstrations will include the event module elements of "Facility Support - Went Well/Needs Improvement" and "Requirements."

Exercise: CW Update

**20.**

**Process Facilitation.** All organizations rely on the clarity of one or several core processes that attract the revenue needed to remain financially viable. The Facilitation Team plays a critical role in helping the organization gain and sustain clear documentation and a culture of high process capacity. *CapacityWare*<sup>TM</sup> will demonstrate how it can be engaged to assist in this undertaking by providing Process Metrics and Matching Tasks with Talent that will help process owners and contributors continually improve performance and pin point areas of concern before

they cripple productivity.

Alignment Model  
 Exercise: 5-Year Timeline  
 Game: Rocks

**21.**

**Mission: Practitioner Education.** The Team Facilitator will often be the first to recognize that training is needed in order that key players are effective in their role. In some cases, training can be delivered or fine-tuned on-the-spot while in more severe conditions the individual may require off-site attention at a scheduled event. *CapacityWare*<sup>TM</sup> in combination with our web site on the Internet will be used to qualify individuals in their specific duties or report the status of individuals in selected positions.

**22.**

**Role: Model Organization Citizenship.** Team Facilitators will be expected to use *CapacityWare*<sup>TM</sup> 360o Feedback options to obtain information about their own behavior in the organization as a means of setting the example for others. The *CapacityWare*<sup>TM</sup> demonstration will illustrate this option.

**Day 3 - PM**

Exercise: Check-in

**23.**

**Cultural Facilitation.** Team Facilitators are also Cultural Facilitators and must be mindful of opportunities to improve the cultural capacity of the organization outside the traditional group environment. They can use *CapacityWare*<sup>TM</sup> to find specific relationships that need tending, or they can tend relationships using *CapacityWare*<sup>TM</sup> as a guide once low-yield relationships have been otherwise detected. *CapacityWare*<sup>TM</sup> will be demonstrated using a feature called "hover-and-click" to find viable suggestions for improving critical relationships. The feature can, of course, also be used for more than just a one-on-one effort.

**24.**

**Post Event Considerations and Actions.** When an event is completed, the Facilitator updates *CapacityWare*<sup>TM</sup> based on the new information now available. A variety of elements are updated, and several reports are generated. This *CapacityWare*<sup>TM</sup> demonstration will focus on the "After Action" element of the event module where remediative next-steps are clarified.

Exercise: Peer Evaluation  
 Exercise: CW Update

**25.**

**Role: Researcher.** Facilitators often research the latest information available in the organization development domain and elsewhere to find "best practices" that will accelerate success. *CapacityWare*<sup>TM</sup> demonstrations will include the "Quote" files, which contain extracts from

across the spectrum of contemporary literature on hundreds of topics.

**26.**

**Mission: Certification.** Individuals often self-identify a desire to learn more and participate fully in the *CapacityWare*<sup>TM</sup> system of organizational change. A certification program allows these individuals to make deliberate progress toward their individual and organizational goals. As various levels of certification are achieved, they are recorded in *CapacityWare*<sup>TM</sup> to assist in finding the right person for the right job. This capability will be demonstrated.

**27.**

**The External Consultant Team and Facilitator Relationship.** Facilitators are always encouraged to keep in touch individually and collectively with the external consulting team. Direct access is encouraged for those who need assistance or help with difficult issues. An active internal client Facilitation Team ought to be visited quarterly by at least one member of the external team to assure continuity and freshness. *CapacityWare*<sup>TM</sup> will track these "connections" as part of the event module.

Exercise: Facilitate Graduation Ceremony

Attachment 6

## Residency, Phase II, RGB Certification, Syllabus

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

12. A Residency Application is required for attendance. The information on the Application is used to tailor the actual course agenda.

Description - Day 1
<p><b>1.</b> <b>Residency Setup</b> Provide a description of what will happen during Residency.</p> <ul style="list-style-type: none"> <li>- <b>5-Day agenda overview</b> - Will track a pseudo-client through a change cycle.</li> <li>- <b>Confidentiality</b> - Speak about client conditions in this environment - repeat nothing.</li> <li>- <b>Roles</b> - Defined to develop empathy with teams and client positions.</li> <li>- <b>Homework</b> - Follow-through each day and prepare for the next day.</li> <li>- <b>Missed-time makeup</b> - Participants responsible for their own learning.</li> <li>- <b>Facility</b> - Quick virtual tour of facility.</li> <li>- <b>Residency versus on-line</b> - Explanation of face-to-face versus Internet activity.</li> <li>- <b>EDU catalog</b> - Express the desire to share the current national catalog listing.</li> <li>- <b>Signature consistency</b> - Create the single-image signature to foster client comfort.</li> <li>- <b>Library history</b> - Provide a brief history of the 5-volume client library.</li> <li>- <b>Web visits</b> - Demonstrate the connectivity to Web resources through <i>CapacityWare</i>™.</li> <li>- <b>35-year timeline</b> - Provide planning insights that have impacted the <i>CWPIN</i>.</li> <li>- <b>Certification versus Licensure</b> - Explain the differences between the two options.</li> <li>- <b>Checkin's - ...out's - and ...up's!</b> - Explain the "CHECKS" that help develop culture.</li> <li>- <b>Social Opportunities</b> - Offer the option to gather socially one evening.</li> <li>- <b>Breaks</b> - Breaks are expected once each morning and afternoon at minimum.</li> <li>- <b>Interact!</b> - Participants will get out of this event what they put into it - Guaranteed!</li> <li>- <b>Types of Residency</b> - The options are: <u>Content</u> intense, <u>Network Development</u> intense.</li> </ul> <p>(Note: order will be modified to accommodate late arrivals on day 1 only)</p>
<p><b>2.</b> <b>Client Set (Illustration) - Typical Client Introduction Elements (Modeled)...</b></p> <ul style="list-style-type: none"> <li>+ <b>Classical OD</b> - What kind of consultants are we, and why?</li> <li>+ <b>Capacity</b> - Explain the range from capacity recovery to development.</li> <li>+ <b>Tailored Nature of System</b> - Systemic with Client Tailoring at each stage.</li> <li>+ <b>Model Consistency and Connectivity</b> - All models synchronize for optimum impact.</li> <li>+ <b>INSIDE BUSINESS - The RGB Way!</b> - Community-based literature and client needs.</li> <li>+ <b>Photography and Transcribing</b> - Need to know about reservations in advance.</li> </ul>
<p><b>3.</b> <b>ProZone</b> - learn a "hard" scientific dimension that creates "soft" organization culture issues. Cover the concepts and practical applications of the <b>ProZone</b> Model with its implications on forming and developing organizational culture. Link the concept of "organization capacity" as a central theme with the implications on recovery versus development as being <b>ProZone</b> dependent.</p>
<p><b>4.</b> <b>CWPIN</b> - learn how this dynamic network supports continuous capacity-based learning. We have formed a network of practitioners bound together by a common technology to add strength and diversity to our offerings. This is a past, present, and future description of the network that you are "joining" through this Certification and Licensure process.</p>

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

<p><b>14.</b>  <b>Homework</b> - learn why off-site and off-hours study supports the classroom experience. Each day, we'll ask that you review the day's work and references as well as look ahead to tomorrow's references to help prepare you for sessions that are more effective. Rather than take home all library binders, select one or two of the most important. If, as a participant, you miss any portion of the Residency, you are expected to identify an individual in the class who will cover the material you miss. Make note of the Chart Number of the last chart created before you depart, and the first chart being created as you return. It is a participant responsibility to get up to speed on these topics.</p>
<p><b>Description - Day 2</b></p>
<p><b>15.</b>  <b>Checkin</b> - learn how to continuously recover and develop organization cultural capacity. Checkin's are an opportunity for anyone to ask a question of any kind, make a statement to get a reaction, have spin-off conversation about anything pertaining to the learning focus of the event. Although 30 minutes are normally allocated, the Checkin time may end up being the highest investment of the day!</p>
<p><b>16.</b>  <b>Adult Learning Model</b> - come to understand the "hidden" rationale for powerful event designs. How adults learn and how they apply what they have learned is important to the design and facilitation of events. Since there is a natural flow that best achieves results, taking advantage of that natural design advances almost any group process.</p>
<p><b>17.</b>  <b>Basic Graphics</b> - learn the minimum essential graphic facilitation techniques. Some fundamentals of Graphic Facilitation will be demonstrated. Participants are expected to apply these fundamentals in all future chart work they encounter during the balance of Residency - and beyond. These fundamentals are part of the <i>QWLC - CWPIN</i> signature.</p>
<p><b>18.</b>  <b>Facilitation Essentials</b> - learn the minimum essential facilitation techniques for success. There are several essentials that facilitators need to become "expert" at - Setup, Full Participation, and Tasking are at the top of the list. This short review session helps embed these essentials.</p>
<p><b>19.</b>  <b>RGB - Interpersonal Dynamics</b> - learn what to expect as RGB predisposition's collide. Everyone has engaged in the simple RGB Individual Profile workshop. However, some basics require attention when you shift to interpersonal dynamics. Participants will learn the most important dyadic implications of RGB predispositions.</p>
<p><b>Lunch</b></p>
<p><b>20.</b>  <b>SPOONS, SPOONS<sup>2</sup> and 99!</b> - learn the experiential essentials to surface difficult topics. Participants must have an understanding of GAMES that help make difficult points. Three GAMES will be used to dramatize how "playful" and serious dialog can come together to make a profound difference for RGB workshop participants.</p>

<p><b>21.</b>  <b>OMR<sup>2</sup></b> - learn to plan and implement plans that achieve desired results.  This simple, yet profound cornerstone model is both diagnostic and prescriptive. It holds the cornerstone place among the <i>CapacityWare</i><sup>TM</sup> planning models as the primary integration model with the RGB technology.</p>
<p><b>22.</b>  <b>Practicum Scenario</b> - learn to create a pseudo organization as a backdrop for learning.  A Facilitation Team will be selected and a scenario presented describing the parameters of an event. Those not on the Facilitation Team will be asked to play specific "roles" in this facilitated event. The results of this facilitation will be used for the remainder of the Residency as a backdrop for all other exercises.</p>
<p><b>23.</b>  <b>Creating Instruments</b> - learn how to create a data collection instrument to find critical issues.  Data Collection (Group Interview) instrumentation will be designed and created using <i>CapacityWare</i><sup>TM</sup>.</p>
<p><b>24.</b>  <b>Group Interview</b> - experience a group data collection interview and learn "do's and don'ts."  A Facilitation Team will be selected to conduct a group interview, the results of which will be used to fine-tune other data collected and provide a crosscheck on resulting trends.</p>
<p><b>25.</b>  <b>Checkout</b> - end the day with a checkout that may help adjust topics to group needs.  At the end of a day (or similar period), the idea is to collect information from the participants that will enable an improvement in subsequent sessions.</p>
<p><b>Description - Day 3</b></p>
<p><b>Checkin</b> - learn how to shift dialog into a deeper level of importance to meet organization needs.  Surface questions and comments related to a previous, current, or subsequent session.</p>
<p><b>26.</b>  <b>Respondent Data</b> - learn how to keep track of the organization population with whom you work.  <i>CapacityWare</i><sup>TM</sup> software registers individual records for anyone who will attend an event or participate in a data collection effort. The Respondent Data files contain dozens of fields that are used for a wide range of things that include helping to stay in touch through e-mail and identifying demographics that help sort data collection results.</p>
<p><b>27.</b>  <b>Nested Outcomes</b> - learn the organization developer's default outcomes for all conditions.  Regardless of the project or client outcomes established, practitioners must keep in mind and work toward a set of outcomes established for our network and our profession. These outcomes, if practiced in common, will serve to unite those who are working in different parts of the same organization.</p>
<p><b>28.</b>  <b>Item Generation</b> - learn how to select and create effective survey items.  Instrument (normally survey) Item generation involves both selection from a pool of items and the potential creation of specific items that may not be contained in any item pool. This section explains both the selection process and survey item creation criteria.</p>

<p><b>29.</b>  <b>Prioritizing</b> - learn how to create a sharp focus that gets the right things done right. When a group is used to select and create items, it is often the case that more items are generated than are practical to adopt in the final survey. Under the best of circumstances, a group process will be used to narrow the list of potential items that will be used. Using a group process to select survey items will help prevent suspicion. This lecturette and exercise illustrate this activity.</p>
<p><b>30.</b>  <b>Make Instrument</b> - learn how to create a survey to collect needed data for decision-making. There is a three-part process that results in instrument creation: selection and/or creation of items, editing to tailor the items, and development of the heading that includes the demographic options. These processes will be demonstrated during this session.</p>
<p><b>31.</b>  <b>ICO</b> - learn how to design events and initiatives to optimize organizational effectiveness. The maturation of any group process follows a specific sequence directly related to RGB. This session will detail the work of Will Schutz and show a direct connection to RGB technology that will help drive groups to maturity faster and with greater yield from group activity.</p>
Lunch
<p><b>32.</b>  <b>Examination Demonstration</b> - learn how to get on-line and take required examinations. The two-parts to Certification are Residency and the satisfactory completion of on-line examinations. This demonstration will allow users to complete an examination as they learn the process.</p>
<p><b>33.</b>  <b>Graphic Icons</b> - learn graphic techniques to improve participant retention of materials. During this session, participants will share their favorite graphic "icons" with a walk-around exercise.</p>
<p><b>34.</b>  <b>ICO - Implications of RGB Deficiency - Dyadic Task</b> - learn to diagnose ineffective groups. In groups, participants create a list of potential implications of RGB deficiencies on the dynamics of group maturity and then brief out results.</p>
<p><b>35.</b>  <b>Data Collection - INPUT</b> - learn to input the results of completed surveys. Participants will complete the data collection instrumentation and input it.</p>
<p><b>36.</b>  <b>RGB - Matching Tasks with Talent</b> - experience the results of mismatched job design. Participants will be required to make their <u>own</u> list of the top ten tasks required of them on their current job. These "input" documents will be swapped with others who will RGB type the tasks and engage in a brief coaching session.</p>
<p><b>37.</b>  <b>Select Best Practices to Link</b> - learn to research and identify best practices to solve problems. There are already hundreds of Best Practices (partial and fully completed) that users can link to selected survey items. This exercise enables participants to link survey items with practical solutions to trends surfaced during data collection.</p>
<p><b>Checkout</b> - end the day with a checkout that may help adjust to group needs. Generate feedback that will modify the next day.</p>

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

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