

Suggested Organization Structure for Change Management Facilitation Teams

A. Overview. All teams are as good as the services they provide to those who charter them. Facilitation-coaching teams serve a specific "client" for a specific Event. Listed below are the ten functions that all teams perform. Identify an individual team member for each function and make a wide distribution of this list. Those needing support may contact the individual directly who coordinates that activity. Each team meeting must accommodate a brief report from each functional area.

The Team Outcome: Help Improve the Cultural Capacity of the Organization.

B. Facilitation/Coaching Categories. Facilitation Team members provide routine facilitation or coaching services that fall into one or more of the following categories:

1. Meeting/Group Facilitation. This activity involves traditional meeting facilitation services in six stages:

- ? pre-event planning
- ? pre-event production
- ? transition to the event environment
- ? facilitation of the event
- ? transition from the event environment
- ? post-event considerations and actions.

2. Change Management Design and Support. This activity involves the design, support, and implementation of the ten steps in the change management cycle. The ten stages include:

- ? preliminary orientation and clarity meetings
- ? instrument package development and distribution
- ? data collection, data entry, and validation
- ? analysis, synthesis, and report development
- ? organization feedback and recruitment
- ? coaching lab(s) and planning sessions
- ? team formation and team culture development
- ? development of recommendation design and approval or adoption
- ? implementation and measurement
- ? diagnostic process evaluation and closure or series shift.

3. Coaching. This activity involves a limited duration meeting with one individual or a small group for the purpose of developing an understanding of data results or understanding of a condition that exists and what might be done about it. The session is normally characterized by the use of *CapacityWare*TM.

C. Organization Development Initiative - Team Structure. The following functions may be distributed between team members. The ideal distribution of team functions ought to match (as close as possible) the RGB-MTT (matching tasks with talents) capabilities of each individual. When tasks are undertaken by someone other than that individual to which the task would normally be assigned, that "interim action" must be provided to the proper authority as quickly as possible. The last page of this publication contains a facsimile "Organization Chart" for use in making assignments.

1. Team Leadership. The Team Lead provides a final internal authority for team activity. From this leadership position, final team coordination emerges. The Team Lead must assign and oversee the functions of all team members, be the final internal team decision maker on all disputed issues, and officiate over team meetings (although not necessarily facilitate those meetings).

a. Attend Tag-up Meetings on a regular basis to report on Team Activities (last month, next month).

b. Resolve support needs surfaced by team members (need for supplies, equipment, space, marketing materials, special clothing, coffee cups, etc).

c. Resolve or get a resolution for *CapacityWare*TM Software protocols (who updates specific features, for example). The current list only includes:

1). Name additions, deletions, or changes to include demographics - *CapacityWare*TM Administrator.

2). Maintenance of Event Records (Establishing, posting updates, etc.) - Individual Team Leads or Anchor as designated by the Lead.

d. Responds to a need surfaced by any member of the LMS for which other Facilitation Team members are inadequately prepared.

e. Calls meetings as necessary or suggested by other Team members in order to resolve Team issues in the interest of efficiency and/or effectiveness.

f. Temporarily resolves Team vacancies until a final resolution is achieved.

g. Communicates Team decisions to all Team members and Sponsor(s).

2. Facilitator-Coach Assignment Coordinator. This team member assigns "clients" to teams or team members for facilitation and coaching duties. It is common for this individual to establish *CapacityWare*TM Event Records and inform team members of the Events to which they have been assigned. Assignments will always be made after considering the desires of the "client" but will incorporate the best interests of the organization.

- a. Track Event Record, Clinic Results and Participant Scores for cues.
- b. Contact "attendees" to determine suggestions for improvements.
- c. Look for trends (three or more events) to determine if trends in performance exist.
- d. Prepare "forward" to help teams learn before they engage.
- e. Conduct Individual and Team coaching sessions to help identify areas needing improvement.
- f. Look for redundancies and "black holes" in team content to determine and improve both effectiveness and efficiency.

3. Human Resource Office Coordinator. In order for the "system" to work well, the facilitation team must be well informed of accessions, deletions, and transfers within the workforce. Only when *CapacityWare*TM is current and accurate can it be used effectively in the decision-making process.

- a. Input personnel gains into *CapacityWare*TM.
- b. Process Losses (out of *CapacityWare*TM).
- c. Process name changes to reflect current names of employees.
- d. Adjust demographics for transfers, etc.
- e. Modify demographic list to accommodate changes.

4. Records Coordinator. Every Event transaction produces data/information that achieves a stated purpose and advances the facilitation outcomes. Records must be maintained in order to achieve essential continuity between Events, and between shifts in organization goals. One individual must review records to assure that alignment is achieved effectively and efficiently.

- a. Be the single-stop repository for "retired" manual Event Records.

- b. Review Event Records as they are "retired" to assure they are complete.
- c. Destroy "Retired/Archived" Event Records and other assigned records on schedule.

5. CapacityWare™ Administrator. Although every individual on the Team must be capable of using *CapacityWare™* effectively, it remains that one individual must know as much as possible about the software. This individual can become an essential authoritative resource for all other team members.

- a. Backup system regularly (weekly recommended).
- b. Review routine conventions and defaults for sufficiency and adjust as needed..
- c. Assure software registration routines are completed.
- d. Coordinate conversion of software to "full-service" as required.
- e. Review upgrade options for potential improvements.

6. Information Coordinator. As facilitation and coaching Events unfold across the organization, this individual will be responsible for disseminating the information that results. It will do the workforce little good if they are unaware of what actions are being taken to improve the organization capacity or its potential.

- a. As significant learnings emerge from Events, this individual will be responsible for creating technology to advance the learning process among those who will benefit most.
- b. As information needs are forecast (for research) the information coordinator will assist in the collection and dissemination of that research.

7. Evaluations Coordinator. Everything the team does is subject to being evaluated to assure team members achieve and sustain the highest possible level of proficiency. This individual will receive and process written evaluations and actively seek comments from users to continuously improve team performance.

- a. Review Team evaluation data and suggest improvements.
- b. Track low-ratings and seek information that will clarify the rationale for those ratings as well as formulate recommend potential solutions.

8. Scheduling Coordinator. This individual will coordinate all aspects of the "team calendar." This individual would notify team members and others of team commitments. This also includes the requirement to schedule facilities for team activity.

- a. Coordinate potential schedules with City Hall Calendars to help avoid schedule conflicts.
- b. Review the scheduling of team activities to help avoid too brisk or too lax a pace.
- c. Be on the lookout to find new facilities that meet the needs of teams and aid in reservations.
- d. Know, help acquire, and help schedule needed facilitation resources to meet team needs (Easels, Pads, Markers, Projectors, Portable Computers, Cameras, etc.).

9. Training and Professional Development Coordinator. This coordinator would schedule team members for professional development and other special training needed to perform their functions. In addition, this individual would cover topics of training and professional development interest at regular team meetings.

- a. Collect data on available training that will improve team performance.
- b. Appraise individuals and the Team Lead of opportunities that may improve performance.

10. Recruiting Coordinator. Team members are always subject to rotation through team assignments, and eligible for rotation off team activities. To assure a continuous flow of viable candidates, it is recommended that a "waiting list" be instituted for those having an interest and the necessary qualifications.

- a. Initiate a dialog with those who may be interested in becoming a facilitator and who appear to be suited to the position.
- b. Meet with and discuss potential facilitation assignments with a candidate's supervisor to determine support for this assignment and seek a formal recommendation.
- c. Invite potentially interested candidates to functions so they can observe and "shadow" a facilitator to help stimulate understanding of the assignment.
- d. Assist with the scheduling of training for those interested and recommended for facilitation training and assignment.

D. The Facilitation-Coaching Network. The Facilitation-Coaching Network includes formal and informal relationships that must work well if Facilitation-Coaching resources are to be applied to assist in the development of capacity for the organization. Specific network connections are:

1. Leadership-Management-Supervision (LMS). All organizations operate under the "authority" vested in top leadership, managers, and supervisors. Facilitation-Coaching Teams, and other teams formed to address specific issues are normally chartered by Senior Leadership to work on specific improvement concerns for the organization. Within the context of this charter, team members have limited authority extended to them to satisfy the requirements of their charter. Everyone in the organization ought to be familiar with that charter and abide by the mandates of it.

2. The Human Resources or Organization Development Function. It is common for Facilitation-Coaching Teams to operate under the "wing" of the Human Resources or Organization Development department. This does not limit the authority of a chartered team, rather it provides a welcome "champion" for their efforts. It is also necessary to work closely with HR because of the requirements to keep the *CapacityWare*TM databases as accurate as possible. It will also be a requirement, from time to time, for the scheduling of groups to attend Events. Typically, the authority of the HR office is sufficient to "make it happen."

3. Organizational Schedulers or Calendar Gatekeepers. When scheduling Events, the team will need access to those who calendar facilities and who calendar key people across the organization. This will enable them to select the most compatible date for Events when required.

4. Information Technology (IT) Representatives. The use of e-mail accounts by the Team, and the optimization of *CapacityWare*TM will require that one or more IT representatives be involved from time to time. In addition, the use and upgrade of equipment and networks will always be an item for continuous negotiation.

5. Training Department. Both training and facilitation-coaching are a means toward an end of improving organizational capacity. The degree of "synch" between these two efforts will breed continuity for the organization. In addition, training assets will often be needed for interventions. All professional development activity for Team members will require coordination between the Team and training professionals.

6. QWLC. Primary facilitation-coaching support will likely come from *QWLC*. Nearly every position on the Team will have occasion to coordinate activity with the external consulting team from *QWLC*.

Organization Chart - Team Assignments

Position	Team Member	Primary Contact
1. Team Lead		
2. Facilitator-Coach Assignment Coordinator		
3. Human Resource Office Coordinator		
4. Records Coordinator		
5. <i>CapacityWare</i> TM Administrator		
6. Information Coordinator		
7. Evaluation Coordinator		
8. Scheduling Coordinator		
9. Training and Professional Development Coordinator		
10. Recruiting Coordinator		

Team Lead

Date

Team Sponsor

Date