

# **"Tracking Attendance" for Program Managers**

The number of people impacted by a program and the degree to which program effort has made a predictable difference, often measures successful program management. It is far beyond the scope of this brief paper to get into the specifics of any particular program. Yet most programs seem to have common threads that can be accommodated by *CapacityWare*<sup>™</sup> software. The following sequential actions will help describe how *CapacityWare*<sup>™</sup> software assists the program manager.

**1. Strategic initiatives are established for the program cycle.** Organizations normally have many programs; each designed to contribute to the organization achieving its purpose or missions. Overarching strategic goals are connected to programs for many reasons, not the least of which are budgetary in nature. Several strategic goals are likely, and are normally connected to organizational goals - with each program making a contribution in some way. As program managers create events to achieve their goals, *CapacityWare*<sup>™</sup> can be used to "register" goals as strategic initiatives (See Initiatives at the Activity pull down from the Main Menu). By establishing Initiative Records any event that takes place to achieve initiatives can be linked to that initiative. Periodic reports can then be generated by initiative. For example, if an initiative is to "Reduce Employee Turnover" numerous events may contribute directly to achieving that goal. Each event can be linked to the single initiative so that summary data can be automatically compiled on request.

**2. Events are designed to produce specific results.** The OMR and ICO Models (Facilitation Manual, Tab 2) is used to design events. Although it is possible that a ready-made design is already available online (Click Get Web Agenda from the main OMR design screen), users can always depend on the Best Practices Module (Select Best Practices from the Main Menu) to search for ideas during the design stage. Among the most important design considerations are those who are expected to attend the various events. It is possible that attendees will simply volunteer for sessions that are offered. It may be more effective for program managers to also consider stimulating attendance for the most needy participants, or even taking actions to make some mandatory participants (last resort). Remember to link the Event Record to the Initiative Record so that continuous tracking will automatically happen.

**3. Events are scheduled.** Using an organization calendar, often found in MS Outlook, use the Event Details screen in the Event Module to schedule the date, time, place, and facilitation team. This routine includes an option to post the Event details back to an MS Outlook calendar. There are additional ways to interface with MS Outlook that make program management easier. We'll cover those options in the following paragraphs. The Event Record can also be used as a daily, weekly, or monthly compilation of essential mini-events that recur at a given interval. In this way, *CapacityWare*<sup>™</sup> can be used as a type of checklist on an ongoing bases (simply reschedule the Recurring Event each period).

**4. People are invited to events.** As potential participants are invited, their name can be added to the respondent module so that their attendance can be tracked (invited, declined, confirmed, attended, etc.). From the initial invitation to subsequent communications *CapacityWare*<sup>TM</sup> will interface directly with your e-mail system to manage those communications. The content of each e-mail can also be stored as a note in the Event module so there is a one-stop source for information concerning the event. If attendees cross organizational boundaries, and if *CapacityWare*<sup>TM</sup> is installed as a network solution, other interested parties can also have access to event information as needed. Use the Invite Attendees and E-mail Notice pull down menus at the Event Selection screen to manage these tasks.

**5. Events are conducted.** The Event Record is used from event initialization to event follow-through as the single-source for all information about the event. This includes planning, preparation, and follow-through evaluation. During the preparation stages, an Event Roster provides information about those who will attend. The Name Plates for the session can actually be produced by *CapacityWare*<sup>TM</sup> if desired. If coupled with a library of participant photographs the software can produce everything from participant ID badges to seating charts. The Event Record also provides a gateway to all publications distributed to participants (before, during, and after the event - see Logistics on the Event Details screen).

**6. People attend events.** When people actually attend an event, the Take Attendance routine in the Event Record can be noted. This routine accommodates both those who have been invited and attended, and those who just attended without an invitation. The system will track the difference. Following the event, different communications (e-mails) might be sent to those who attended, those who were registered but did not attend, and those who did attend but were never invited - the system keeps track of that difference automatically. In addition, participants can have an individual "Event Transcript" created that allows them to keep accurate records of their attendance at any event where *CapacityWare*<sup>TM</sup> is used to keep records. In this same vein, supervisors or department managers can ask for a "Participation Report" for their area of responsibility as an aid in determining who has attended specific sessions, or attended any session.

**7. Information is exchanged.** There are numerous event design considerations here. Any media presentations (PowerPoint, videos, etc.) can be launched through *CapacityWare*<sup>TM</sup> and registered as having been presented to those in attendance. Some presentations may be part of a preset design and available over the Internet as a complete package. In some cases, the distinction may include a set of tasks that might have been completed ahead of the actual event (such as the distribution of advanced reading materials or the completion of an online instrument such as the RGB). The attendance also allows the user to track which attendees got which handout version. This might be important to achieve continuity of materials between events in a series of events that take place before and after critical policy changes, for example. If easels and pads are used to make a public record, a digital camera can be used to handle the transcription work. Linking those digital images with the Event Record will allow those interested to quickly gain access to materials covered after the event is completed.

**8. Expectations (Outcomes) are established of event attendees.** As a result of a carefully planned and executed event experience it is reasonable that something will change - behavior! Before people leave the event they must know what that expectation is and be able to commit to either doing something new to some degree, or providing feedback that the event has made no difference in their thinking (and therefore unlikely to shift behavior). This will set the stage for subsequent evaluations that may confirm those expectations (as adjusted by feedback). Immediate feedback collected at the conclusion of the event is registered in the Event Record by both the participants (may also be an Event Survey) and the facilitation/presentation team (see Clinic documentation - What went well, What needs improvement).

**9. Adjusted evaluative criteria are established and data collected to determine progress.** Has the expected shift been made? How much impact has the event made on overall initiative goals? Leaving these measurements to intuition is often worse than not asking the question. The important thing is to be realistic about finding out what happened. Review the OUTCOMES as initially written in the Event Record OMR screen, and adjust expectations by the event feedback received immediately following the event. If the current event design does not achieve the outcomes as stated, perhaps a redesign of the event is in order.

**10. Follow-through helps determine the degree to which expectations are met.** Program managers will do well to find and use a "third party" mechanism that will have high credibility. A later survey of participants, perhaps. Or a survey of those with whom the participants come in frequent contact to ascertain their opinions of the degree to which the event has shifted thinking and behavior. Perhaps the supervisor of participants would be the best of all judges. Ancillary incidents reports (a reduction in turnover, an increase in availability, an increase in suggestions, etc.) may also hold the key to improvement criteria.

**11. Return-on-Investment criteria are analyzed.** *CapacityWare*<sup>TM</sup> offers two distinct methodologies for the calculation of ROI. Both methods require a comparison be made to the cost of creating and managing the program designed to produce the return. Normally the investment that is easily determined by program budget. The second piece is somewhat more difficult. By comparing a pre and post value, managers can often determine the gain or loss achieved. When compared to the overall program budget investment (or appropriate part thereof) the ROI is easily calculated. Each Event Record can be used to track the amount that each event contributes to expenses and revenue.

**12. Adjustments are made in program design based on progress toward program goals.** Adjustments must be considered for both event designs and program management. The sum total of event evaluations will fall far short of total program management. The two evaluations, however, can be accomplished using *CapacityWare*<sup>TM</sup> as the repository of data that will comprise the total evaluation.

## Summary

Managing complex programs is a daunting task. Those that are managed well, adapt, thrive, and grow. Those that are managed poorly fall by the wayside and are eventually cancelled.

*CapacityWare*<sup>TM</sup> software was originally designed to manage a program of classical organization development, but time has demonstrated that other programs are managed equally well using this methodology. Where people come together to learn something that is expected to improve conditions, a program manager is responsible for achieving strategic goals. This software package helps design events, manage processes, and evaluate results - largely through those attendees who participate.

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