

Deployment Guides and Helpful Hints

What follows are guides and helpful hints for your use in curriculum deployment. They supplement the recommended deployment plan with more plan implementation details and are keyed to the eight stage process of creating major change presented in Kotter's book "Leading Change". These stages are consistent with the change model used for the curriculum and presented in more detail in the Learning Leadership Doctrine developed as part of the work of the USACE Learning Advisory Board. Many in our organization are familiar with Kotter's book and its strategies for change.

Kotter's 8 Stage Process of Creating Major Change:

1. Establishing A Sense Of Urgency
2. Creating The Guiding Coalition
3. Developing A Vision And Strategy
4. Communicating The Change Vision
5. Empowering Broad-Based Action
6. Generating Short-Term Wins
7. Consolidating Gains And Producing More Changes
8. Anchoring New Approaches In The Culture

Culture, Process, Structure

Self-Study Guide

Distributing the Disks

Helpful Hints

1. Communicate using every means possible! Use multiple means to engage every learning style (*Communicating the Change Vision*).
2. Stir up interest with advanced "teaser" communication (see posters in Communication Aids).
3. Set the context when you distribute the disks to employees: Communicate what you are doing and why (*Establishing a sense of urgency; Communicating the change vision*).
4. Make certain each permanent employee gets a copy of the disks and is provided the time to view them (*Empowering broad-based action*).
5. Be clear on your expectations of the workforce and the organization. Who's involved? (*Who is your guiding coalition for change*)? Who are the deployment team members? Facilitators? Mentors? Small group discussion sponsors? What is the schedule? How will the disks be reviewed? How will the effort be funded? Why is this important? Communicate the various roles and their place in the change process.
6. Plan a kick-off event, like a town hall (see briefing slides provided in the Communication Aids). At the town hall, introduce your *guiding coalition*. Have them talk about what they are going to be doing.
7. Develop "talking papers" that can be used by leadership, management, project managers, others to talk with their staffs, teams, etc. about what we are doing and why (see Information Paper and example messages under Communication Aids) (*Communicating the Change Vision*).
8. Communicate the curriculum system requirements and make certain all computers (including laptops) have been enabled with QuickTime and Flash.

Viewing the Disks

Helpful Hints

1. PDT pilot the viewing to learn what some of the IM issues might be and to make a list of user tips as well as to familiarize themselves with the content and the navigation for helping others. Establish an IM POC to help people with IM issues associated with the disks (see system requirements and user tips provided in this kit under Communication Tools).
2. Provide multiple opportunities for viewing in order to target multiple learning styles. For example,
 - ✓ Viewing on your own at your own workstation or on TDY via laptop.
 - ✓ Setting up group viewing sessions in a computer lab/training room. Have an IM person there to help; plus a facilitator and a PMBP mentor/member of the deployment PDT to answer questions).
3. Make use of already existing forums (like staff meetings and team meetings) to:
 - encourage people to talk about what they are learning,
 - hear how employees are applying what they are learning to their everyday work,
 - share good ideas with others,
 - identify organizational structure/processes/behaviors (culture) that they see to be inconsistent with the PMBP,
 - stimulate discussion among coworkers,
 - discuss where they have changed their own behavior in response to what they have learned and the consequences of that change.
4. Develop an incentive/recognition program to recognize people as they complete the viewing of each course and begin to apply what they have learned to their work. Advertise and make short-term wins public. Recognize those responsible publicly in a town hall forum, as an example (***Generate short-term wins***).
5. Set up a means for people to get quick responses to their questions about what they are learning in the self-study. An electronic in-basket to the PDT is one example. Engage the assistance of your PAO! Communicate responses of wide applicability to the workforce in a running list of FAQs. Post

questions on PMBP Portal to see what others think as well as to share clarifications you have developed with others in the Corps.

Curriculum System Requirements

In order to use the curriculum disks, you must have [QuickTime 5.0.2 \(or later version\)](#) on your computer for the CD content and [Flash and Adobe Acrobat](#) to enable the web content. Contact your IM systems administrator to install this software.

Other minimum system requirements for the curriculum are:

- P II - 400 MHz
- Connectivity to the WWW
- Microsoft Windows 95, 98, WinNT, 2000
- Netscape 4.0 or higher; or Internet Explorer 4.0 or higher
- 15 inch SVGA monitor
- 8 Mb Video Card (supporting 800X600 screen resolution)
- 32 Mb RAM
- 8X CDROM Drive

Please note: These requirements are to implement the curriculum; not to deploy P2. Additional software, as well as hardware, is required for P2. Information on those requirements will be provided separately from this curriculum deployment kit.

User Tips

Some things learned so far from curriculum users:

- Turn off all other programs (e.g., email, CEFMS, etc.) before using the CDs.
- Extend the time on your screensaver to minimize interruptions during viewing (additionally, to the extent possible, find a block of time when you can work uninterrupted when viewing the CDs).
 - Also periodically jiggle your mouse to prevent the screensaver from coming on.
- Some new Dell computers require a sound card fix. If you have one and are having trouble with the audio on the curriculum CDs, see your system administrator for help. [The website for the Dell sound card](#)

"fix" is: <http://support.dell.com/us/en/register.asp?redirect=yes>
Look up the type of computer you have and go to sound card drivers.

- Some Corps organizations may want to put the curriculum on their LAN for training sessions/small group discussions. This may not work well depending on the demands on your system because of the large multimedia files contained within the curriculum. All permanent employees of your organization are receiving their own copy of the curriculum to enable flexibility and to maximize opportunity for viewing, for sharing what they are learning with each other and for applying the curriculum to their work.

The Student Notebook

The student notebook is a series of note pages contained in each course. These note pages are available on the web via the CD - click on STUDENT NOTEBOOK. Print off the pages and use them for taking notes as you go through the curriculum. Keep your note pages in a loose-leaf notebook for easy reference.

CD Evaluation and Certificate of Completion

At the end of each course, participants have the opportunity to evaluate the course and receive a certificate of completion. The evaluation and certificate are accessed through the Professional Development Support Center's (PDSC) virtual campus. To receive the certificate, you must do the evaluation. To do the evaluation, you must register on the virtual campus. If you have ever taken a course on the virtual campus, you have already registered and you will use the same password. A "Forgot your password?" button has been added to the site, as have directions for printing the course certificates.

Small Group Discussion Guide (Empowering broad-based action)

Small Group Discussions (SGD) are the most critical component of the curriculum. The goals of small group discussions are:

- To develop a common understanding of the PMBP principles within our organizations
- To instill a discipline of sharing ideas, experience, and knowledge - learning from each other and together - a critical skill for team learning and success.

The **SGD method** of learning draws on the experience and knowledge of the participants to achieve defined objectives. It is an adult learning method - different than instructor led - in which the instructor is the expert and is imparting knowledge to the "students". SGD are facilitated discussions - aimed at creating a psychologically safe environment for team members to fully participate and is designed to draw out the participants to share what they know and guide the process to achievement of its objectives.

To achieve these goals it is important that time be spent in **planning, designing, conducting and evaluating the small group discussions**. The role of the facilitator and the sponsor are key to the success of achieving these goals and more specifically the purpose and objectives of each of the small group discussions. Because no two organizations are in the same place on the "PMBP journey", no specific cookbook approach can be taken to any change program. Instead making use of the general guidance provided here, each Corps office must assess where they are with the PMBP and hence where they believe their focus needs to be. The assumptions made about where the organization is need to be checked and rechecked and reevaluated on a continuing basis. A suggestion is provided in this kit on how to do that. Such evaluations could be part of already established forums in the district - such as corporate board meetings, middle management meetings, various employee/employee-management forums; team meetings.

The team learning disciplines practiced in SGD are key to becoming a learning organization. This is an opportunity for a whole organization to learn key principles about how we do our work together and to share ideas and

lessons learned. It has been said in this era of knowledge assets, that the greatest strength an organization can have to continue to provide value to its customers is to be able to convert what is learned quickly into action that benefits the customers. The discipline of the SGD both serves to enhance our ability to learn from each other and also to build a common understanding of PMBP. As a result, our goal is to become "corporately agile" in serving our customers needs by leveraging our resources quickly and effectively to bring to bear on any engineering and scientific problem within our mission purview. At the same time, we also maximize the potential and growth opportunities for our employees aiding their ability to contribute, to be valued team members, and to take pride in our organization - a key to our ability to retain and attract talent, and to sustain our critical capabilities.

Key Roles. To review, the key roles in a SGD are:

- Facilitator
- Sponsor
- Participants

Small Group Discussion Process

The process for achieving the small group discussions is described in the following. This guide is largely addressed to the facilitators and the sponsors, but is also meant to gain leadership, curriculum deployment PDT and mentor understanding of the SGD process.

Getting Started (the "you" in this discussion is the facilitator)

You are at the stage at which the PMP has been developed and approved and the small group discussion (SGD) plan developed, establishing who will participate, when, where and who will be the sponsor and the facilitator for each. Such a plan might be in a matrix format and look something like the chart found in the section in the kit on the recommended deployment plan. Assessment of organizational focus for the SGD has been done - or will be done as part of each SGD. You, as the facilitator, now are ready to get started. You have learned the basics at the facilitator training and you are now ready to apply them. Remember to team up if you are inexperienced or if you have been assigned a large group (more than 10).

1-Planning the Small Group Discussion. The planning phase of the SGD consists of the facilitator preparing for a meeting with the sponsor, meeting

with the sponsor, soliciting information you will need to design the agenda for the SGD, and checking on the logistics for the SGD. Key outcomes of your meeting with the sponsor are:

- Purpose, objectives, and outcomes of the SGD (you may want to come to the sponsor's meeting with an agenda outline as a place to start)
- Gaining an understanding of the participants and their knowledge of the PMBP
- Ensuring roles are clarified. Will a mentor be invited? If so, what will his/her role be?
- Clarifying where the meeting will be held and when; how much time you will have; number of participants; what incentive/recognition you will use for SGD completion.
- Deciding whether you are the right facilitator for the group. Remember you are an in-house asset and as a facilitator will want to be as objective as possible. It may be difficult for you to maintain objectivity with a certain group because of your past experience with them - perhaps as team member or coworker. Also the nature of the group may require a more experienced facilitator - or a team of more than one facilitator. In any case, you will need to take the responsibility to find an alternative/teammate and coordinate that with the sponsor.
- Deciding who will communicate with the participants, what the message will be (e.g., remind them that they must do self-study before coming), who will prepare any read-ahead (e.g., like the roles and responsibilities contained in course 1).
- Deciding what small group discussion questions you will use in your SGD. Use any "focus" guidance that may have been provided by your leadership in development of the PMP. If none, talk with the sponsor about what might be most appropriate for the group.

You will want to double check the room and ensure that it is reserved and that the appropriate equipment has been arranged and will be there on the designated day. In some organizations, a logistic PDT team member may handle this task and you will coordinate with that person. In others, the facilitator may play a bigger role in the logistics.

Helpful hints

- Suggested group size: ideal 6-8; no more than 10.
- Time: A two-hour block.

- Number of questions: Have 10 ready and prioritized. Expect to cover 3-4. **Remember goal is to have a meaningful discussion, not to cover all the questions.** Suggest you review all the questions for an entire course and select from all questions. For each course within the curriculum, questions are provided, as are possible discussion points. For any particular course, depending on the need within that organization, you may have one or more SGD sessions.

Note: Part of the assessment done as part of PMP development is to decide the number of SGDs per course.

The following additional resources are provided for use in the planning phase of the SGD:

- Example questions for conducting the meeting with the sponsor (SGD-1).
- A logistics checklist (SGD-2)
- An example sponsor meeting read-ahead from SGD with the Chief (SGD-3)
- An example pre-meeting design (SGD-4)
- Example of discussion questions and possible discussion points (SGD-5).

Note that in the example case provided, the Chief is serving the role of the workshop sponsor, as well as he is a PMBP mentor. This may or may not be the case of any particular sponsor you are working with. A mentor may or not participate in a small group discussion. This is part of the planning done in development of the PMP.

2-Designing the SGD. The design phase involves developing the agenda details, deciding what processes will be used to facilitate the discussion, and assuring appropriate room and equipment arrangements. This phase involves the facilitator preparing the agenda for the SGD based on information resulting from the meeting with the sponsor. You and the sponsor will also decide whether the agenda will be distributed before the SGD and who will do that. As part of the agenda development, you will decide what facilitation techniques you will use to draw out the group. Suggest a variety be used to appeal to different people's learning styles. If your group is large, then you will need to consider breaking people into smaller groups, then bringing them

back to share with the larger group. If this is the case, you will also need to consider more time to conduct the SGD - maybe extending it to a 3-hour block. If a long time is planned, be sure to incorporate a break that keeps people in the room (e.g., a stretch break; having coffee/water and snacks) and helps to continue the dialogue. For large groups using a longer block of time, a place offsite may also be preferred to help resist the temptation of people getting called back to their desks.

Examples of [different facilitation methods](#) include brainstorming; individual work using post-its, then round robin to share (each person can say "pass" if they have nothing more to add); role playing and sharing; working in partners; breaking the group into smaller groups and then reconvening to share results. These are just a few of many examples that can be used to stimulate discussion and engage the participants.

Some other aspects of designing the SGD include determining whether you will need to have an [introduction/ice-breaker](#). Such is recommended especially if the group has not worked together as a whole before. It helps to break the ice as each participant learns something about each other. Also since you are facilitating in-house groups, participants may hold strong opinions about each other that can inhibit sharing and participation. An introductory exercise that allows each person to share something little known about themselves can help to break down stereotypes we have of each other and to open us up to new possibilities for ourselves as well as others. This helps to ensure full participation and creation of a safe environment. Also consider the time you have available when deciding what, if any, introductory method you will use.

Other considerations to clarify as part of the design phase:

- ❑ Plan what will be charted on butcher block paper; who will chart it
- ❑ What will be done with what is charted
- ❑ What are the expected outcomes of the SGD
- ❑ Decide whether the agenda will be sent out to the participants before the SGD (recommended)
- ❑ Will there be any other resources used by the participants at the SGD - and if so, who will prepare them, what is their purpose and how will they be used.

Note each SGD design should have an opening, a middle, and a closure. The purpose, objectives, and outcomes need to be specified as part of the agenda/SGD design.

The following additional resources are provided to assist you in accomplishing this phase:

- SGD Agenda Template (SGD-6)
- SGD Agenda Example (SGD-7)
- SGD Planner Checklist (SGD-8)

3-Conducting the SGD. Remember your job as a facilitator, in working with the sponsor, is to create a safe environment for learning, to engage the participants, and to guide the SGD process toward achievement of the goals and objectives of the SGD - managing the process including time! The sponsor's job is to present a positive attitude about the PMBP, work with the facilitator in ensuring success of the SGD, kick off the SGD, be a full participant, and help the facilitator run interference if the process gets bogged down by a participant(s). The facilitator must work hard to be objective. The sponsor can play a critical role in helping the process stay on track and moving forward.

The phases of conducting the SGD are to open the SGD, manage the discussion, and to close the SGD.

Opening

Opening includes welcoming the participants, stating the purpose and goals, establishing ground rules, reviewing the agenda/and any handout materials/references. If you are using one, have an icebreaker/introductory exercise decided between yourself and the sponsor during the planning and design phases.

Managing the Discussion

Key methods for managing the discussion include using different ways to involve the participants. You may want to use a different method for each discussion question, although that is not necessary - although at least some variety is recommended. Such techniques as brainstorming and asking open-ended questions can be particularly useful. When you feel you might be

losing control of the process, ask a clarifying question of an individual or of the group. Keep the attention off yourself and onto the group. Using open-ended questions is very effective in stimulating discussion and drawing out the participants. Referring to the ground rules and bringing people back to the purpose of the session (keep it posted on the wall as well as the ground rules) can both help you effectively manage a process that is beginning to get off track. Remember it is not your role (or the sponsor's) to have all the answers. You want to draw upon the experience and knowledge of all of the participants and maximize their opportunity to contribute to the discussion.

Closing

In closing the SGD, remember to summarize key points and review the agenda to ensure objectives have been met. Identify remaining issues (BIN items) and "pin the rose" on who will take what action if any and by when. Perform an AAR and identify lessons learned (what worked in the SGD; how could the SGD be improved), as well as evaluate the effectiveness of the session content (what was learned?). What follow-up actions will be required? Decide who will type up the workshops results and who will do what with the results. **How will results be shared and communicated and by whom?** Decide what will be posted for sharing with others in the organization, within the region, and within the larger Corps via the PMBP Portal. And who will do the posting? Pass out the incentive/recognition for having completed the SGD. Pass out and collect evaluation forms.

Helpful tip: Remember to use open questions to keep the conversation going - closed to bring the discussion to a close.

Additional resources provided for use in this phase include:

- ❑ Guidance for open questions (SGD-9)
- ❑ Brainstorming rules (SGD-10)
- ❑ SGD evaluation form (SGD-11)
- ❑ Ground Rules for SGD (SGD-12)

4-Evaluating the SGD. This phase is critical for continuous improvement to the process as well as feedback on the content of the curriculum. It is divided into two parts - group evaluation of the SGD by the participants (occurs as part of the closing phase of the SGD) and facilitators self-evaluation based on group input as well as their own evaluation of themselves.

After each SGD, each facilitator should use the input of the AAR/lessons learned to improve their facilitation skills. It is recommended that the facilitators meet on a periodic basis to share evaluations/lessons learned results with other facilitators for continuous improvement of facilitation skills and the SGD process as well as to roll up any feedback gained on the content of the curriculum. Decide what should be posted on the Portal and shared with others and who will do that.

Note: The PMP should address how results will be rolled up, shared, curriculum deployment tracked and results measured.

Additional Helpful Hints about Conducting the SGDs

1. Senior leaders do a small group discussion at the outset of curriculum deployment and share their experience with the workforce
2. Show the video of the Chief/MSC SGD to give people a sense of what to expect (provided with this kit).
3. Develop some posters/visuals to post in the small group discussion rooms to stimulate thought and dialogue as people enter the room.
4. Require that all participants have viewed the course before coming to the small group discussion.
5. Sponsors provide feedback to leadership through PRB or other appropriate forum. This feedback (gaps, good ideas) can be used as input to strategic planning, training plans, operating budgets, recruiting and retention practices, processes, etc. **(Consolidating gains and producing more change)**
6. There are many approaches that can be taken for the small group discussions depending on the specifics of your situation and needs. Some alternatives are listed as follows:
 - Start with functional groups - especially in groups that might find that a safer group for sharing to gain familiarity with SGD
 - Move to the extent possible to cross-functional group of no more than 10.

- Assemble large groups with multiple facilitators that will hold SGD in a specified block of time. Be mindful that this will take more time, but be sure to schedule breaks and opportunities for people to move around. If you do a large group, design the session to provide small group opportunities using different techniques for dialogue and then sharing with the larger group. This may work well for all managers as an example - a group that could really gain by sharing ideas, building an understanding.
- Have snacks!

7. Encourage participants to talk with their supervisors about what additional training they may have identified they need as a result of the course viewing and SGD. Refer to the formal training section of the curriculum course as a place to start to identify possible courses to fit those needs.

8. Encourage participants to post what they have learned, comments, and good ideas on the Portal for sharing with others.

What's Next? Reinforcing the Curriculum

(Anchoring new approaches in the culture)

What's next after the curriculum has been deployed?

Further Training

It is expected that though the process of self-study and the small group discussions, participants will identify additional needs for learning. As these are identified they would be communicated to the supervisors and become a part of the individual's IDP. Some needs may be so widespread in an organization that a more organizational approach needs to be taken to providing training - perhaps onsite if the need warrants. Refer to the [Formal Training](#) component of each course curriculum for a place to start in identifying training sources to meet further needs.

What Happens After Initial Curriculum Deployment Is Completed

When the curriculum is completed, the work isn't over. The principles taught in the curriculum need to be continually reinforced for a new - modified - culture to sustain itself - otherwise we tend, being humans, to fall back to our old ways and habits. The [roles of leadership, mentors, and coaches](#) are critical to PMBP reinforcement and sustainment in an environment of continuous learning. After action reviews, learning from each other as we do out work in teams, sharing ideas and experiences and developing those "third" alternatives are key sustaining ingredients to our success.

Consider the curriculum disks as a part of your reference library to be referred to and used in team meetings, discussions with customers and other stakeholders. Keep some in your organization's library, share them with your customers, and use them in new employee orientations.

The goal of the PMBP program is to provide for the continued maintenance, updating, and refinement of the curriculum contents to reflect what we learn from our experiences in applying the principles of PMBP. The curriculum has been designed in an effort to place the more time sensitive material on the web for ease of updating and the less time dependent content on the CDs.

Additional Helpful Hints

- ❑ Keep the communication flowing - you're not done when the curriculum is done!! Change and learning are continuous!
- ❑ Walk around and talk to people about what they have learned and how they are applying it. Continue to celebrate and recognize accomplishments. Use real examples of projects to illustrate use of the PMBP principles and their impact on project results.
- ❑ Measure the results in a way that connects learned new behaviors with organizational performance (see example provided in kit) **(Anchoring new approaches in the culture)**.
- ❑ Engage your customers! Ask them for feedback on any changes they have observed. What differences in results have they observed, if any? In their relationship with us? In our processes and attitudes? Do they feel like a valued member of the project team?
- ❑ Visit PDT meetings, acknowledging observed changes that support the PMBP. Look for the use of small group discussion techniques in team meetings and signs of team learning taking place.
- ❑ Advertise PMBP mentors and their availability for continuing support.
- ❑ Incorporate the curriculum into new employee orientation - assign a mentor/coach to work with each new employee to develop that understanding **(Anchoring new approaches in the culture)**.
- ❑ Expand your mentors/coaches and facilitators to include other members of the workforce who have surfaced as persons of influence in your organization through the initial curriculum deployment. Continue to expand your coalition for change. Draw upon you LDP and emerging leader graduates **(Consolidating gains and producing more change)**.
- ❑ Modify performance evaluation systems to reflect the desired changed behavior **(Anchoring new approaches in the culture)**.

- Model the change - most critical!!!! (**Anchoring new approaches in the culture**)

- Incorporate new behaviors in leadership development programs and succession planning (**Anchoring new approaches in the culture**) Draw upon you LDP and emerging leader graduates.