Course Catalog
for
ClearView Management
Resources

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Note 1: *ClearView is not limited to the above list of courses or to the descriptions or curriculum designs listed in this catalog. We design and develop new courses and customize existing courses as needed by organizations.*

Note 2: *ClearView has a SaaS based learning tool (teamshareHub) that can be used to enhance learning programs. It supports blended learning operations by:*
- *Facilitating Pre, In-Between and Post classroom assignments for both class participants and the managers who enabled their learning experience*
- *Engaging participants in private "rooms" in Forum discussions*
- *Engaging participants in "What If Mind-Drills" (case studies, work scenarios...)*
- *Facilitating "participant created" What If Mind-Drills*
- *Providing ongoing resources such as Job Performance Aids related to the subject matter and reference sites and documents*

Employment & Labor Laws

- **Civil Rights**

  This course directly relates to the safety of staff, clients, and suppliers, and to the perception of safety. It affects the constructive nature of interpersonal communications and the sensitivity to and respect of others. And, provides mechanisms to voice concerns and manage conflict. All of the above affects morale and the delivery of services.

  This workshop is designed to provide workers with factual information about the issues of sexual harassment (and other legally protected harassments) and discrimination. Learn what it is, what it isn't and what it might be; how women and men may have different perceptions; and what the US court system is deciding. Learn the law, analyze gray areas, discuss case history, understand what it does to a workplace, evaluate your responsibilities and liabilities, the complaint process, saying no or confronting a harasser, and government enforcement.

  This course explores employment laws such as the Civil Rights Act of 1964, Americans with Disability Act, Age Discrimination in Employment Act and Fair Employment Practices law, and agency policies which affect staff behaviors, interactions with clients and suppliers, and management to staff relations.

- **Civil Rights – Protecting Yourself & Others**

  This course is designed for all management personnel to assist them in conducting all day-to-day operations in compliance with Employment and Labor laws and to assist them in understanding their roles in compliance versus the roles of the Human Resources Department and legal counsel.

  This course explores the importance of compliance with all Employment and Labor laws; the purpose of the laws, which activities and which organizations are covered by the laws; management compliance behaviors and compliance tools; and who enforces the laws and what enforcement actions may be taken.

- **Employee Relations: Employment Law for Supervisors and Managers**

  This course is designed for all management personnel to assist them in conducting all day-to-day operations in compliance with Employment and Labor laws and to assist them in understanding their roles in compliance versus the roles of the Human Resources Department and legal counsel.

  This course explores the importance of compliance with all Employment and Labor laws; the purpose of the laws, which activities and which organizations are covered by the laws; management compliance behaviors and compliance tools; and who enforces the laws and what enforcement actions may be taken.

- **Employment Laws for HR Practitioners**

  This course is designed for Human Resources Practitioners and explores the many different Employment Laws which affect the operations of private businesses and government agencies of the State of Ohio. Attendees will gain a better understanding of their Purposes, Employer Applicability Requirements, Basic Provisions/Requirements, Time Limitations for Filing Complaints, Penalties for Noncompliance, Enforcement Agencies, Records Retention Requirements, and Compliance Activities: Policies, Training, Practices, Reporting…

  In addition, the employment laws will be examined from a day-to-day operations perspective; examining how the different laws apply to Hiring and Promotions, Compensation and Benefits, Time Off, Acceptable Work Behaviors, Layoffs, Investigations and Documentation, Corrective/Disciplinary Action, Labor Relations, Workplace Safety, Workplace Injuries, and Rehabilitation, Records and Information Management.

  Finally, the extent of these laws will be examined through the study of landmark legal cases and most recent cases.

  The following laws are covered depending on whether Public or Private Sector:
  1. National Labor Relations Act
  2. Fair Labor Standards Act
  3. Civil Rights Act of 1964
  4. Affirmative Action
  5. Americans with Disabilities Act
  6. Drug-Free Workplace Act, 1988
  7. Age Discrimination in Employment Act
  8. Privacy Act
  9. Occupational Safety and Health Act
  10. Public Records Act
  11. Equal Pay Act of 1963
  12. Civil Rights Act of 1991

13. Family and Medical Leave Act, 1993
14. Worker Adjustment & Refraining Notification Act, 1998
15. Consolidated Omnibus Reconciliation Act (COBRA)
16. ORC 119, 124, 149, 4102, 4112, and 4117
17. OAC 123

- **Employment Laws for Management**

  This course is designed for all management personnel to assist them in conducting all day-to-day operations in compliance with Employment and Labor laws and to assist them in understanding their roles in compliance versus the roles of the Human Resources Department and legal counsel. This course explores the importance of compliance with all Employment and Labor laws; the purpose of the laws, which activities and which organizations are covered by the laws; management compliance behaviors and compliance tools; and who enforces the laws and what enforcement actions may be taken.

- **FMLA: 2008 Amendments & Final Rule**

  This course impacts the management of employees relative to FMLA administration, which impacts resource availability and the efficiencies of services for the clients of Job & Family Services.

  At the end of this course, participants will be able to:
  1. Understand an overview of the changes made to FMLA in 2008 due to amendments and final rule of the DOL.
  2. Understand how this rule modifies employer administration of FMLA.
  3. Understand how this rule impacts day-to-day roles and responsibilities of management relative to FMLA.
     Understand how this rule impacts day-to-day roles and responsibilities of employees relative to FMLA.

- **Labor Relations**
  1. The Contract: Management Rights, Discipline and Contract Processing Issues
  2. Union Representatives at Your Door: Do's and Don'ts
  3. Grievances and Arbitrations:
     a. Minimizing Likelihood of Occurrences
     b. Process and Documentation
     c. Actual Track Record v Perceived
  4. Issues Uncovered in Pre-Class Survey
  5. Case Studies in Compliance and Non-Compliance Behaviors

Communication Models & Systems

- **Blue Eyed, Brown Eyed: An Exercise in Discrimination**

  This course explores the four themes uncovered in Jane Elliott's diversity experiment: 1) Differing Realities; 2) Rules of the Game; 3) Pygmalion Effect; and 4) Complicity. Exercises and discussions focus on how these themes can play a role in client and peer processes, beginning with everyday communication practices, and how through increased awareness of self and others, curiosity, broadened focus, and initiative we can overcome some of the destructive processes and outcomes.

  How we behave with and treat others, because of their differences or perceived differences, impacts professional ethics, social and cultural foundations, supervision and administration of programs, Social Worker values and ethics, and practices for special populations.

  As a result of these exercises, you will learn:
  1. About the "differing realities" of employees in the workplace and how these can play out in the workplace, and you will explore ways to reduce destructive outcomes;
  2. The difference between written rules and actual day-to-day practices and how these can change from "leader" to "leader" and from "players to players", and you will explore the impact of the differences and ways to address them;
  3. How your expectations of others often become self fulfilling prophecies and how these play out in the workplace; and you will explore the ways in which *you* can influence change; and
  4. What complicity is, and you will explore your roles and the roles others play in perpetuating it and how you may impact small, but impactful, steps to positive change.

- **Business Etiquette**

Through a greater understanding of the scope and breadth and specific behaviors of good office/business etiquette, Social Worker Supervisors will be able to:

1. Develop business objectives related to office/business etiquette;
2. Establish performance/behavioral standards and expectations related to office/business etiquette;
3. Initially communicate about and "educate" management and staff on the objectives and standards and expectations;
4. Continually model the behavioral standards and expectations related to office/business etiquette;
5. Provide ongoing performance feedback to management and staff relative to actual behavioral performance with respect to the standards and expectations; and
6. Consistently reinforce the behavioral standards and expectations.

Learn how good office/business etiquette leads to:

1. Improved business relationships amongst agency peers which results in improved services (quality and quantity);
2. A feeling of respect toward clients which results in improved performance of processes between employees and clients;
3. A professional atmosphere that is less subject to inappropriate behaviors which can damage business relationships and subsequently damage results…

- **Business Writing**

General Business Writing Courses

A. Grammar, Spelling, Vocabulary Levels, and Other Typical Writing Errors – *The Basic Foundation of Credible Writing*
    1. Sentence Structure
    2. Incomplete Sentences v. Run-On Sentences
    3. Spelling: Typical Mistakes and Spelling Review
    4. Most Misused Words
    5. Prepositions – *Where oh Where to Put Them*
    6. Most Common Punctuation Errors
    7. Vocabulary Levels – *You're Intelligent v. You're a Snob*; *I Understand v. What Did You Say*
    8. Workplace Diversity & Writing - *Words can Mean Different Things to Different 'Peoples'*
    9. Importance of Proofreading – *What You Don't See Can Hurt You*

B. Illustrating Data & Concepts: Flow Charts, Graphs, Matrices, Models, Pictures, PowerPoint Presentations, and other Visualizations – *Illustrating for Impact: Understanding & Retention*
    1. Benefits of Visuals – *Painting the Picture*
    2. Continuums – *When Information Isn't Black or White*
    3. Flow Charts & Timelines – *Illustrating Processes and Chronological Order*
    4. Graphic Representations of Data - *Putting Data Information In Perspective* and *Misrepresenting Information*
    5. Matrices – *Organizing Categories of Information*
    6. Models & Photographs – *A Picture Paints a Thousand Words*
    7. Similes & Metaphors – *Only Words, But Graphic Nonetheless*
    8. Selecting Words with Impact
    9. PowerPoint Presentations – *Words & Graphics in Motion*
    10. Spread sheets – *It's not just words, numbers also tell a story*

C. Standard Communications: Letters, Memorandums, Faxes, and Emails – Internal and External
    1. The Roles of the Different Categories of Written Communications: When to Write v. When to Speak; When to Hardcopy v. When to Email; When a Letter v. When a Memo; and On and On.
    2. Quick Tips for Organizing Your Message
    3. Basic Formats of Each Category
    4. Communicating Tone
    5. Overcoming Resistance to Your Message - *Write as if you know the response of the reader*
    6. Pros & Cons of Emails (e.g., brevity v. professionalism)
    7. *Proof Reading for Understanding of Your Message: I Know What I Wanted to Say; Is That What They Read?*
    8. Minimizing Communication Inundation – *Avoiding Overwhelming the Reader*

D. Proposal Writing: Influencing Change
    1. Basic Format for Writing Proposals – Models of Proposals
    2. Characteristics of Effective Proposals
    3. Evaluating & Understanding the Current Situation: Strengths & Weaknesses, Quantitative & Qualitative Analysis, and Supporters & Resisters to Change
    4. Identifying Objectives - *Measurable Outcomes*
    5. Pros & Cons of Change
    6. Researching Alternatives
    7. *Alert: Best Practices & Other Bandwagons*

8. Costing Alternatives
9. Presenting Alternatives
10. Supporters & Resisters to Change; *Finding & Using Allies*
11. Delivery: Who, When, and How
12. Proposals In Response to RFP's: Reviewing RFP's to Identify the Characteristics of an Effective Response

- ### Communication Methodologies
  In this course, management and employees will explore the importance of clear, thorough, engaging, diplomatic, and constructive communications; explore the factors which impact communications; learn a basic communication "model" that can be used for all interactions; learn how to make feedback EASY; and discover tools that can be used to increase the effectiveness (increase understanding and retention) when communicating. The model, values and tools can be used when delegating work, communicating information; addressing conflict (issues, concerns, problems) between peers, management and staff, and employees and clients; proposing change; and on and on. They will learn not only how to increase the impact of communications, but how to make them more efficient and congenial.

- ### Communication Practices for Performance & Employee Relations
  a. Philosophies/Values for Employee Relations and Performance
  b. Methodologies – Tools and M&L Behaviors
    i. Communication Worksheets
    ii. Overcoming Communication Hurdles: Fear of Confrontation, Differing Perspectives, Trust…
      - Ladder of Inference
      - Two Columns
      - Behavioral and Results Specifics, NOT Personal
  c. Communicating Upward – Inquiries, Clarification, Raising Issues…
  d. Case Studies: Practicing Impactful Communication Methodologies
  e. Hostile Work Environment: Policy, Sample Issues, Resolution and Avoidance

- ### Communication Processes & Tools for Results
  Communications is a process, everyone knows that; sender to receiver…And it's frequently thought of as a basic, almost elementary, process. However, is your process efficient, achieving desired results in as little time as conceivable? Do your communications have the impact you desire, or do you sometimes feel that you have been communicating over and over with little results? Would you like to enhance the interactions you have with your employees, peers, and management?

  Do your communications sometimes get the desire results and yet cause conflict, annoyance, or frustration with others? Does your process include tools to facilitate the process and get the desired results?

  In this course participants will be able to:
  1. List and explain the six steps of the Communication Road Map and how the use of this will improve the efficiency of communications and enhance employee relations;
  2. List and explain the Communication Values for positive employee interactions;
  3. Explain and demonstrate use of the Feedback Made EASY process and tools;
  4. Demonstrate use of the Discussion Planner in conjunction with the Communication Values to prepare for communications with employees, peers, and management;
  5. Explain and/or demonstrate how these communication tools may be used for the following
     a. Coaching Employees
     b. Making & Explaining Decisions
     c. Introducing Change
     d. Problem Solving
     e. Corrective Action
     f. Meeting Management
     g. Performance Feedback
     h. Other Situations

- ### Customer Service
  This course will explore Who are the customers in the Job & Family Services industry; What is 'good' customer service and What is 'bad' customer service, *how do you know it when you see it and hear it*; Why provide good customer service, ramifications and benefits; What are the obstacles to good customer service; How to provide good customer service, goods and services and service delivery; and When to give good customer service.

  It will examine the most common and most difficult customer service scenarios and how to best deal with them. In addition, it will explore tracking and forecasting customer service situation to better prepare staff and to minimize occurrences and reoccurrences.

Finally, participants will learn about customers' needs, practices that help meet those needs, and categories of customers and 'best' ways of interacting with each.

Customer Service Course Outline

- A. Who are the Customers?
- B. What do the Customers mean to Me?
- C. Good v. Bad Customer Service
- D. Understanding Customers and Building Positive Customer Relations
- E. Statistics About Customers
- F. Feelings & Perceptions versus *Reality*
- G. Attitudes
- H. Customer Interactions
- I. Your Roles and Responsibilities Regarding Good Customer Service
- J. Listening toward Understanding
- K. Dealing with Confrontation; Problem Resolution
- L. The Language We Use; Do's & Don't of Word Selection
- M. Service Habits to Meet the Needs

Delivery
- A. Workshop Style
- B. Workbook provided
- C. PowerPoint Presentation
- D. Role Playing of Interaction Strategies
- E. One Day Program

This course will seek to answer these questions:
- Who are the customers in the Job & Family Services industry?
- What is 'good' customer service?
- What is 'bad' customer service?
- How do you know it when you see it and hear it?
- Why provide good customer service, ramifications, and benefits, and for you v. for them?
- What are the obstacles to good customer service?
- How to provide good customer service, goods and services and service delivery?
- When to give good customer service?

- ## Executive Leadership in Workplace Diversity Initiatives
  Specifically designed for Executives and Senior Managers, participants will analyze their leadership roles in the organization and responsibility for ensuring success with diversity. The course involves a fundamental look at the importance of workplace diversity, the organization's experience with and reputation for diversity, and relevant case studies and laws.

- ## Immigrant Populations In The Workplace
  Demographics in the workforce continue to shift as our national and local populations become more culturally diverse. According to the Bureau of US Citizenship & Immigration Services, approximately 10 million immigrants have entered the US in the last decade alone. The US Census Bureau reveals that English is not the primary language spoken in 10% of the homes in Columbus, Ohio. Having a greater and clearer understanding of immigrant populations will enhance supervision of immigrants employed within county Job and Family Services agencies and will enhance client relations for those caseworkers working with immigrant clients. Employers must foster an understanding and respect for our immigrant population to benefit from their talents, serve their needs as customer and employees, and strengthen our organizations and community. Exercises and discussion cover immigration trends, current demographics, and a study of the primary cultures introduced to your community. Participants will receive accounts of the experiences and challenges facing immigrants in the workforce and society at large.

- ## Positive Outcomes with Angry Customers
  Sometimes customers can act out their inner frustrations. This can result in verbal expressions that can be loud and disruptive to other customers and to JFS workers, can be threatening to the safety of others, can be vulgar, and on and on. If not handled correctly, it can impact the entire production culture creating a negative, destructive environment in which people do not want to work or to seek the services.

  Attendees will gain knowledge, philosophies, and methodologies (skills and tools) to achieve more positive outcomes when confronted with these types of situations and to minimize the occurrences of these types of situations. This will include subjects such as the impact of mindset, organizational support, what not to do to facilitate the behaviors, and tactics to use in person and on the phone.

- **Privilege of Power**

  Participants examine the influence of class, race, ethnicity, gender, and other cultural identifiers on gaining power and privileges in American society. Exercises develop critical thinking skills and awareness to recognize hidden biases and reduce subtle discrimination and tensions in the workplace.

- **Regulations & Guidelines on Confidentiality in the Workplace**

  The confidentiality of private personal information such as social security numbers and medical statements, used by organizations such as the government, banks, hospitals, and insurance companies has been a concern for years. Software applications that process this private information and often link to the Internet and to Intranet systems to facilitate the updating and sharing of information within an organization, between organizations, and by the individuals, put the confidentiality issues under a new, more intense, and greater in scope spotlight.

  These systems resulted in more opportunities for unauthorized access to private confidential information and in more illegal activities, some relative to masses of people, not just one at a time. The term *Identity Theft* became much publicized; infamous. Subsequently, more and more laws and regulations, mandates, guidelines, policies and procedures, etc. were enacted and implemented to provide more control and security. In addition, the type of information covered grew and awareness about the issues spread into business arenas that hadn't given it credence before. Furthermore, the consequences of violations increased.

  The multitude of functions that are conducted within ODJFS, other associated state agencies, and the numerous associated county agencies (e.g. JFS', CSB's and CSEA's) across the State of Ohio include the acquisition of immeasurable amounts of private personal confidential information, managing it in data systems, and sharing it with other organizations and individuals. And, they do this with very little training, procedural security measures, and tools (e.g. checklists). The liability, organizational and individual, is immense.

  This course is a formidable introduction to Regulations & Guidelines on Confidentiality in the Workplace: the many issues; associated laws and regulations and program mandates and policies (who's covered, what information is covered, penalties...); compliant and non-compliant behaviors and security measures; and how this is specifically related to the vulnerable elderly population.

  Learning Objectives:
  The objectives of this course are for the participants to:
  1. Be able to list the top reasons for the laws and regulations and program mandates and policies associated with the confidentiality of customers' personal information that is captured as part of processing cases
  2. Be able to list the laws and regulations and program mandates and policies associated with the confidentiality of customers' personal information that is captured as part of processing cases
  3. Be able to list the personal information that is covered
  4. Be able to list security measures/practices for sending and receiving this information through the multiple channels of communications; compliant behaviors
  5. Be able to list non-compliant behaviors
  6. Be able to list special precautions for how to ensure security for the vulnerable elderly adult
  7. Be able to list indicators that the vulnerable elderly adult may be targeted by family members and other scams
  8. Be able to script a dialog with a vulnerable elderly adult to reduce their vulnerability relative to the sharing their confidential information and the use by others; what to do to minimize the risk and what to do if feel violated
  9. Be able to list the potential personal and organizational penalties/punitive actions that may be suffered if the laws and regulations and program mandates and policies are violated

  Note: If the organization wishes, a written test may be conducted at the end of the course.

- **Religion in the Workplace**

  Changes in demographics, an increase in the number of religions represented in the workplace, and an increase in faith-based employee networks present a growing challenge to the workplace. Employers must address the accompanying (concurrent?) religious bias and tensions as they strive to create inclusive work environments that value and benefit from diverse talents, ideas and experiences. These religious biases threaten performance, productivity and legal compliance if progressive enough to be identified as "religious harassment".

  Recent surveys have revealed an increase in religious discrimination cases in the workplace[1] with as many as 2 in 3 survey respondents reporting religious bias or discrimination in the workplace[2]. Almost half of those reporting experiences with religious discrimination stated that their performance was adversely affected by the discrimination[3]. Yet only 1 in 3 HR professionals surveyed included religion in diversity training[4].

  Religion in the Workplace offers organizations an opportunity to address the growing challenge of religious discrimination and bias. The course assists managers and staff in promoting cultural understanding through a basic overview of major world religions and

identifying the potential for hidden biases and tensions between coworkers. It also works with participants to identify potential accommodations for religious practice and to set respectful limits for religion in the workplace.

- **Workplace Diversity**

    This basic course is an introduction to the benefits and challenges of an increasingly diverse workplace. Exercises and discussions focus on defining diversity and related terms, identifying and dispelling prejudices, valuing differences, and examining relevant laws and allowable behaviors in the workplace.

    How we behave with and treat others because of their differences or perceived differences impacts professional ethics, social and cultural foundations, supervision and administration of programs, Social Worker values and ethics, and practices for special populations.

    At the completion of this course, participants will be able to:
    1. Explain the many different aspects of workplace diversity – give a definition.
    2. List and explain the impact it can and does have on the workplace between customers, both internal and external.
    3. Give the Definitions of the various "diversity" terms and phrases.
    4. Understand and explain how our different *circles of contact* impact our understandings of and interactions with diverse populations.
    5. Explain what prejudice is, how individuals become prejudiced, and how prejudice can result in inappropriate behaviors in the workplace.
    6. Identify their own prejudices.
    7. List and explain the values of diversity in the workplace; what are the positive outcomes.
    8. Explain the differences between obvious distinctions and who they are as persons in the workplace.
    9. Explain Differences & Similarities
    10. Create a more inclusive *Cultural Diversity Calendar*.
    11. Explain the Legal Evolution

- **Workplace Diversity Initiatives: Objectives, Strategies and Tactics, & Measuring Effectiveness**

    This course is designed for HR Executives to evaluate the purposes and goals of Workplace Diversity Initiatives; explore the myriad of potential workplace diversity initiatives that are practiced by other organizations and how they help achieve the mission and goals; explore trends in diversity issues such as religion in the workplace, the aging of the workplace, and increasing immigrant populations; evaluate total impact on the organization; design a holistic workplace diversity program; implement diversity initiatives; and measure the results and effectiveness.

    Participants will examine and discuss realistic situational dilemmas, debate the ethical and legal considerations, and simulate practical solutions. Learn to assess all of your agencies diversity related activities, such as Employment; Purchasing; Customer Service; Advertising, Marketing, Public Relations and Communications; and Community Involvement/Philanthropy; and their impacts on HR and its Workplace Diversity goals.

Management & Leadership Development

- **Controlling (Two one-day courses)**

    Management control is frequently thought of as holding people accountable, putting the hammer down, tightening the reigns, and on and on. In fact, more control is achieved when management establishes an effective list of key performance indicators, establishes clear expectations, conducts periodic audits (NOT micromanaging), provides effective performance feedback, assists in problem solving, and enforces consequences when necessary and consistently.
    These courses will teach all of the above and provide communication methodology to do so most effectively. It will include case studies and "dress rehearsals."
    1. Key Performance Indicators: State, County, and Yours
    2. Standards: Regulations…
    3. Performance Management: Measurement, Feedback, Improvement Plans, Documentation…
    4. Corrective Action
    5. Problem Solving
    6. Decision Making and Decision Changing

- **Deadly Sins of Management**

  This course directly relates to the effectiveness and efficiency of the delivery of all services by a County Department of Jobs & Family Services. It affects the design of processes and policies; the resolution of problems internally and externally; the morale and commitment of management and staff; how fiscal and time resources are spent; the development of the human resources (management and staff) of the agency; and the commitment of senior management to continually moving toward excellence.

  So you've learned to be the best boss and manage for 'high performance'. This course explores management practices which can tear down what you have been working so hard to build; and at a rate 5 to 10 times faster. This seminar explores communications; accountability – *what it is and what it isn't*; de-motivation factors – *stop focusing on pumping them up, quit letting the air out*; management practices – *what you say and do, the leading HRD factor*; failure to have practical measurable controls; ineffective problem resolution; and finally, the trust factor.

- **Dealing with Difficult Employees & Unacceptable Behaviors**

  It's no secret that productivity, staff morale, and service to clients is at its highest when everyone is working effectively as a team and practicing basic tenets of appropriate behavior and interaction.   Unfortunately, this is not always the case due to the disruptive behaviors of difficult co-workers – behaviors which contaminate attitudes and negatively impact interpersonal relationships.

  This one-day workshop will provide an in-depth examination of the types of 'difficult' employees; present a framework for understanding the disruptive and unacceptable behaviors; identify some of the factors that contribute to or enable their difficult behavior; and present specific strategies for responding appropriately whether you are the difficult person, a co-worker, **or** the supervisor.

  At the end of this workshop participants will be able to . . . .
  1. Understand the various types of tough, difficult employees and their impact on the workplace
  2. Understand the different types of negative attitudes, be sensitive to underlying causes leading to negative attitudes, and know ways of preventing an *Attitude Virus or Epidemic* from permeating an entire group or the entire workplace
  3. Identify specific strategies for dealing with the **Sherman Tank, the Drama King/Queen, the Know-it-all, the Bully, the Perfectionist,** and **the Chronic Complainer**
  4. Know common characteristics shared by all difficult employees and look through a 'lens of understanding' to be able to identify typical reasons **WHY** the behavior exists and persists
  5. Examine their own behavior to determine if they are one of the 'difficult employees'

- **Effective Delegation via SMART Communications**

  Delegating work is a typical practice in business, no matter what sector or industry. It is used to increase organizational efficiency and to develop staff. How it is done can have great impact on outcomes and efficiencies, on employee relations, and on legal compliance. In this course you will learn how to use SMART communication practices when delegating, how to use a communication efficiency model and tools, how to incorporate situational leadership principles, delegation pitfalls to avoid (including legal risks), and how to incorporate delegation into individual development plans.

- **Engaging Employees** (One Day Course)

  Inspiring people to follow (leadership) involves a number of philosophies, competencies, and methodologies. Engaging employees and keeping them engaged requires a combination of these beginning with a clear, concerted picture of the mission and values of the organization. In addition, efficient communication practices are at the core of inspiring, impactful leadership.

  This course is designed to develop the leadership competencies and methodologies to ensure consistent mission messages, to align personal leadership values with organization values and leadership practices, to increase awareness of employee morale and engagement, to quit "putting out the fires", and to communicate efficiently and effectively to achieve the mission while increasing or maintaining employee morale.

  1. Organization, Department, Unit…Mission Statements
  2. Creating a Leadership Culture: Organization "Core" Values
  3. Your Leadership & Management Values and Their Alignment with the Organization's
  4. Leadership Integrity: *Practices Reflecting Values*
  5. Motivation v. Demotivation: Minimizing "Public Sector Turnover" *(the body is here, but the soul has left)*
  6. Reading, Not Labeling Employees
  7. Communication Strategies and Tactics
     a. Engaging Employees
     b. Communication Values
     c. Situational Leadership
     d. Coaching v. Directing
     e. Communication Roadmap: Creating Efficiencies in Communication
     f. Discussion Worksheet: Design for Results
     g. Leadership "What-If Mind Drills" – Case Studies in Communications

- **Goals & Objectives**

  This course is intended to help individuals and those who manage or coach others (e.g. employees and clients) to achieve more through the effective setting of Goals and measurable Objectives, the development of plans, and the use of follow-up tactics.

  By the end of the session, participants will be able to…
  1. Explain the difference between Goals and Objectives and their impact.
  2. Explain the impact of *written* goals and objectives.
  3. Develop goals.
  4. Help others to develop goals.
  5. Develop objectives.
  6. Help others to develop objectives.
  7. Create a plan to achieve objectives which will result in progress toward goals.
  8. Design follow-up activities to incorporate into plans that will increase the probability that the goals and objectives will be achieved.

- **Group Dynamics I**

  Groups of people or teams (in the business world) play a tremendous role in the culture and *realized* production of an organization. People strongly impact others; sometimes even resulting in some discarding their integrity to fit in or to stand alone. Groups of people can create anxiety in some and excitement in others. And, these groups/teams will take on a life of their own unless influenced by the leader.

  Attendees will gain knowledge, philosophies, and methodologies (skills and tools) to achieve more positive outcomes when leading groups/teams. This will include subjects such as creating a culture, ground rules, group communications (including dealing with inappropriate behaviors), and when groups change.

- **Group Dynamics II**

  Groups of people or teams (in the business world) play a tremendous role in the culture and *realized* production of an organization. People strongly impact others; sometimes even resulting in some discarding their integrity to fit in or to stand alone. Groups of people can create anxiety in some and excitement in others. And, these groups/teams will take on a life of their own unless influenced by the leader.

  Attendees will gain knowledge, philosophies, and methodologies (skills and tools) to achieve more positive outcomes when leading groups/teams. This will include subjects such as creating a culture, ground rules, group communications (including dealing with inappropriate behaviors), and when groups change.
  This is part two of two one-half day sessions. This session explores non-traditional ways to engage employees into group processes and performance improvement systems to be used for teams.

- **Inspiring "Excellence" (Two One-Day Courses)**

  Many organizations are in a "survival" mode; do just what is necessary to stay out of trouble. This course is designed to give managers the leadership mindsets, skillsets and toolsets to create a workplace culture and practices that inspire all personnel to continuously pursue improved processes and results.

  In this course, participants will learn how to build and maintain teams with drive and focus; how to enhance the impact of diversity; how to create a workplace in which change is perceived as a positive, ongoing practice; how to inspire personal brilliance which results in creativity and innovation; and how to benchmark practices within other organizations and industries to create applicable processes which yield measurable mission results.
  1. Teams:
     a. Their Impact on Business
     b. Teams: Business Families - *Functional v. Dysfunctional*
     c. Practicing Integration with Other Teams; Evading *Silos*
     d. Stages in Team Development
     e. Leading Through Team Changes and Maneuvering *Through* Conflict
  2. Change as a Norm; Inspiration of, Generation of, and Enhanced Responsiveness to
  3. Creating a Continuous Improvement Culture: Initiating and Inspiring Creativity and Innovation; Benchmarking; Best Practices; Organizational Mentors…
  4. Workplace Diversity; From Tolerance to Appreciation to "Facilitation" – 1 day

- **Interviewing Skills for Management**

  Marketing "Blurb"

  > *This course addresses two forms of interviewing: 1) Hiring & Promotion Interviews; and 2) Investigative Interviews. In this course you will learn about Laws & Regulations and other procedural restrictions, Strategies of investigations, Do's & Don'ts, Tools to use, establishing Criteria and measuring performance relative to the criteria, and Recommending action.*

  Course Outline

  Hiring & Promotion Interviews (4 hours)

  1. Candidate Assessment Process: Policies, Union Contracts, and Employment Laws (Federal, State – ORC 124, and Codes – OAC 123)
  2. The "Do & Don't *Asks*" in the Interview Process
  3. Developing Selection Criteria
  4. Assessment Tools & Processes
     - Interviews
     - Roles Plays
     - Demonstrations
     - Sample Work
     - Testing
  5. How to Measure Candidates' Assessment Performance With Respect to the Criteria, and How to Rate Candidates' Performance

  Investigative Interviews – Accusations/Complaints, Misconduct, & Poor Performance (2 hours)

  1. Purpose of the Investigation – Fact Finding leading to:
     - Corrective Action
     - Disciplinary Action
     - Criminal Prosecution
  2. Strategies for an Investigation
  3. Investigative Tools
  4. Laws & Regulations: Policies, Union Contracts, and Employment Laws (Federal, State – ORC 124, and Codes – OAC 123)
  5. Weingarten
  6. Garrity
  7. Laudermill

- **Leadership & Boundaries: *To Know Them is to Love Them* (One Two-Day Course)**

  Legislation is typically viewed as restrictive; not allowing organizations to efficiently accomplish their mission. However, the more you know, the more you learn what can be done. And frequently, moves toward compliance result in enhanced performance and reputation.

  This course is designed to explore what compliance means and doesn't mean; to teach methodologies that enhance the efficiencies of performance and meet compliance requirements; and to increase compliance knowledge such that liability is reduced.

  1. Exploring the Benefits
  2. Employment Law: *Springboard, Conscience, and Tool for Improvement*
     a. Your Roles and Responsibilities
     b. An Overview (Discrimination, Safety, Labor, Family Protection, Privacy, ORC 124, OAC 123…)
     c. Investigations
  3. Policies and Work Rules
  4. Union Contract

- **Logic Models**

  - *Do we have a clear picture of the expected or designed outcomes of our programs and practices; short range, medium range and long range? And, do we know how well we are performing against those expectations or designs?*
  - *How can we improve our outcomes?*
  - *Can we maintain the expected or designed outcomes and reduce the inputs and/or activities; increase efficiencies?*

  Logic Models begin with a focus on the results or outcomes of practices, programs, projects and services. They are plans which include goals, objectives, inputs (resources), activities (processes), outputs (products of the activities to achieve the outcomes), and outcomes (measureable results). **They are management tools used to define and measure work.**

  Logic Models are performance improvement tools that were originally designed for non-profit organizations and then were adopted by some progressive public sector organizations. We offer the following four courses:

  1. Logic Models: A Basic Understanding/Orientation for All Staff

The purpose of this course is to familiarize all employees of the organization (which is implementing Logic Modeling) of the Why's, How's, When's, Who's and Where's of Logic Modeling. This will help them to understand the impacts it may have on their programs/services, on them and on their customers. It will provide a basis from which they may generate more specific inquiries. It will facilitate more engagement by the employees and help to create a culture of performance improvement with Logic Modeling being the core.

I.   The Logic Model "Model"
II.   Origin, Purposes, Uses and Benefits
III. The Mission of Logic Modeling in Our Organization
IV.   The Infrastructure of Logic Modeling in Our Organization: *Making it Work*
V.   Deeper Into the Model
    A.   Inputs
        1.   People, Dollars, Data and Equipment
        2.   Direct & Indirect
        3.   Internal & Partners
    B.   Activities - Processes
    C.   Outputs - Tools Generated, Filings, Reports...
    D.   Outcomes & Measures
        1.   SMART
        2.   Process v. Administrative v. Behavioral
        3.   Mandated v. Organization Generated v. Benchmarks
        4.   Related Measures (e.g. financial and hours)
VI.   Creating Your Models
    A.   Organization Wide v. Functional/Program Oriented v. Service/Product Specific
    B.   Benchmarking: Internal & External
VII. Best Practices - *Processes to Improving/Achieving Outcomes*
    A.   Guidelines v. Detailed Processes
    B.   Internal v. External
    C.   Analysis to Identify
VIII. Data - Sources, Analysis and Usage
IX.   Phases of Logic Modeling Implementation & Maintenance
    A.   Where We Currently Are
    B.   Direction - *The Future*

2.   <u>Fine Tuning and Managing Logic Model Processes & Tools</u>
There are two variations of this course. One is designed for the organization who has implemented Logic Modeling and is looking to make short term improvement. It is designed for the management team to explore and assess the current Logic Modeling methodology and make changes to improve the current effectiveness. It begins with increasing buy-in and commitment of those driving this initiative internally. It then explores improvements: to elements of our current models (inputs, activities, outputs and outcomes), to benchmarking practices, to identifying best practices, and to report and presentations. Finally, we begin the process of determining strategies; moving into a driving position in the county relative to Logic Modeling.

The second variation is for those organizations who have adopted Logic Modeling as a strategy and are moving towards implementation. This variation is typically two days in length.

I.   Exploring the Return on Investment of Logic Models
    A.   Committing to it for the *long run, achieving employee buy-in, making it a culture...*
    B.   What are the Benefits to:
        1.   Customers
        2.   Our Organization - Mission, Workers, Finances/Efficiencies...
        3.   Taxpayers
II.   Deeper Into the Model: *What should the different elements include? How should they be organized?*
    A.   Final Product: *What Should It Look Like?*
    B.   Building It Backwards: *Start with where we want to go/what we want to achieve and then figure out how we're getting there.*
        1.   Start with Programs/Services Goals
        2.   Outcomes & Measures
            a.   SMART
            b.   Process v. Administrative v. Behavioral
            c.   Mandated v. Organization Generated v. Benchmarks
            d.   Related Measures (e.g. financial and hours)
            e.   What to include now v. future strategies
        3.   Outputs - Tools Generated, Filings, Reports...

    4. Activities
        a. Difference between Activities and Outputs
        b. Processes: *Getting to/Building Outputs*
    5. Inputs
        a. People, Dollars, Data and Equipment
        b. Direct & Indirect
        c. Internal & Partners
        d. Constraints

III. Benchmarking
    A. Effective Benchmarking: Moving from *apples to oranges* to *apples to apples*
        1. Benchmarking Metrics
        2. Evaluating the Numbers
        3. Graphs
    B. Benchmarking: Internal & External

IV. Indentifying Best Practices - *Processes to Improving/Achieving Outcomes*
    A. Defining: Best Practices v. Values, Guidelines...
    B. Internal v. External
    C. Best Practice Metrics

V. Reports & Presentations

VI. Analyzing the Trends of Action Items

VII. Where Do We Go From Here: *Moving from the backseat to the driver's seat*

3. <u>Exploring & Building Future Strategies of Logic Modeling</u>
4. <u>Creating Logic Model Subject Matter Experts</u>

- **M&L Practices for Compliance and Performance**
  1. Employment Activities & Employment Laws Matrix
  2. Management Philosophies for Compliance & Performance
     a. Decision Making Criteria
     b. Consistent Application
     c. Follow Through
     d. M&L Integrity
     e. others
  3. FMLA: Managing Day-to-Day Issues
  4. Managing Leave Issues: PPL, VAC and LTSL
  5. The Dirty Dozen: M&L Practices to Avoid
  6. Issues Uncovered in Pre-Class Survey
  7. Case Studies in Compliance and Non-Compliance Behaviors

- **Management Styles**
  There are different styles of management and these styles create workplace cultures and impact performance levels. Different management styles also impact each employee differently depending on a variety of factors. Most managers have a style all of their own that is frequently the same no matter what situation. However, some managers can be effective at using different management styles with different employees in different work situations. Finally, if you are not skilled at using different styles in different work situations, it can damage employee relations and possibly lead to legal complaints.

  In this course you will learn about different styles of management (e.g. skills and strengths and weaknesses), evaluate your own style, begin to explore which style would be best for you in your current organization and how to achieve the competencies of this style, learn when and how to use "situational leadership", and explore how to reduce problems such as negative employee relations and legal complaints.

  At the completion of this course, participants will be able to:
  1. Explain the different styles of management.
  2. List and explain the impact each style can and does have on employees, on the culture of the workplace, and on delivery of services to customers.
  3. Evaluate your own style.
  4. Explore which style would be best for you in your current organization.
  5. Develop a plan for achieving the competencies of your "contracted" style.
  6. List the benefits of using "situational leadership".
  7. Determine when and how to use "situational leadership".
  8. Learn strategies and tactics to reduce problems such as negative employee relations and legal complaints

- **New Manager Orientation: Transitioning to Management**

  This workshop is designed to help promoted peers and outside hires transition into a new and highly impactful role in management. It begins with an exploration of the impact that individuals in management roles play in business outcomes such as the achievement of the organization mission, the evolution of the workplace culture, and legal compliance and liability. This course will expand participants' awareness of the scope of the job, the challenges of being new to the role and/or to the organization, and the process of moving into the roles and accomplishing the missions. And, it will explore the process of transitioning into management.

  1. Exploring Your Impact as a Manager & Leader
  2. Missions; The Organization and Management
  3. The Four Functions of Management
  4. Expectations: Your Roles and Responsibilities; An Overview
  5. The Many Challenges of a New Manager
     a. Your Not a "Bud" Anymore
     b. Confidentiality
     c. Personal v. Business Life
     d. Perceptions
     e. Modeling the Values
     f. Managing Your Time
     g. Maintaining the Time Resources of Your Employees
     h. others
  6. The First 90 Days
  7. Setting Expectations, Yours and Theirs

- **Organizing (One Day Course)**

  How well leaders are organized and how well they manage the factors which impact the organization of employees' influence the efficiency with which work is accomplished, thus minimizing the effects of limited resources.

  This course is design to teach how to organize work; how to develop work-flow documentation; how to measure process inefficiencies; how to improve work processes; how to effectively delegate work to develop staff and to accomplish more; about management practices which adversely impact the time management of employees; how to enhance the results of meetings; and how to improve the efficiencies and accomplishments of projects.

  1. Organizational Structure; Work-Flow…
  2. Process Improvement
  3. Delegation
  4. Organizational v. Individual Time Management
  5. Meeting Management
  6. Project Management

- **Planning (One Day Course)**

  If you want something to happen and you want it to happen most efficiently, you must plan for it and do so in writing. Otherwise, it's frequently just a pipedream; never going to happen.

  This course is designed to teach the methodologies and skills to establish goals and objectives; to understand the benefits of proactive, strategic thinking; to develop efficient plans to maximize the use of available resources; to react to immediate legal compliance needs and yet plan for the most efficient process which still meets compliance needs; and to realize the benefits of establishing a concerted plan of action for employee development. And, this course will create a philosophy of planning; not just reacting.

  1. Setting Goals and Objectives
  2. Strategic, Operational, and Improvement Planning
  3. Mandated Changes: *Parallel Path* Planning
  4. Succession Planning
  5. Personnel Development
     a. Personal Brilliance
     b. L&D Architecture: A Learning System
     c. Individual Development Plans
     d. Coaching
     e. What-If Mind Drills: Ongoing Employee Development
     f. Mentors and Structured OJT
     g. Delegation
     h. Management Modeling and Reinforcement
     i. Career Planning

- **Strategic Planning**

  This course is designed for Executives, Senior Managers, and the HR Functions of an organization to facilitate the HR function becoming a strategic business partner in the achievement of the organizations' missions. To explore the trends in HR issues and strategies to overcome these issues; to assess HR's performance (*measuring HR's contributions*), opportunities for new HR goods and services, and external threats; and how to draft the Strategic Plan document (format of documentation).

- **Supporting Management & Leadership Development**

  In this course senior agency managers will revisit or learn how to support and reinforce the development of middle managers and front line supervisors. Specifically, it will address the development of middle managers and front line supervisors in the "management and leadership practices for compliance (legal and contractual), performance and employee relations". They will learn pre and post-class activities to conduct with their direct management reports to ensure application of competencies developed and continual learning.

  1. Overview of the Curriculum: "M&L Practices for Compliance, Performance and Employee Relations"
     a. Philosophies – M&L Values
     b. Methodologies – Practices: Tools & Processes
     c. Competencies
  2. Curriculum Flow: Pre-Class Survey and Assignment, Classroom, and Post-Class Assignment
  3. Engaging Your Managers and Supervisors: Pre and Post Session
  4. Reinforcing Continual Application & Development

- **Teaming...Managing Work Teams**

  This course builds skills needed by management to most effectively lead and manage teams of employees for excellent performance and the skills needed by team members to create teams that are most efficient. These skills will impact the level with which services are delivered to customers, such as timeliness, accuracy, and customer impact.

  It covers how to lead and support/reinforce team philosophies, competencies and methodologies and how to be a constructively impactful team member.

  1. How each individual's roles/work activities impact the efficiencies of other work unit peers;
  2. How each individual's roles/work activities can be integrated with other work unit peers to create a more efficient unit;
  3. How work unit peers can daily identify potential gaps in work performance and help to close those gaps as needed;
  4. How to measure the impact that teaming has on work unit efficiencies on a regular basis;
  5. Communication values and tools which will minimize common communication problems and will increase the effectiveness of day-to-day interactions amongst work team members.

  Activities/exercises will incorporate the exploration of current and planned (new and modifications) teaming systems (e.g. work flows, competencies, and values)

  Work units, groups, committees...are all teams of people; it's just that some are more "functional" and some are more "dysfunctional" on the *Teamwork Continuum*. This course will examine philosophies, competencies and methodologies integrated into efficient teaming practices.

- **The World of Talent Management**

  "So the immediate problem is not the *number* of potential candidates. Rather, it is a *talent mismatch*: There are not enough sufficiently skilled people in the right places at the right times."

  - *47% of organizations cannot identify their high potential talent*
  - *2011 - 32% of employees are considering leaving their employer as opposed to only 19% in 2009*
  - *Only 42% of employees believe promotions go to the "most qualified"*
  - *To sustain projected economic growth by 2030 the US will need to add more than 25 million workers*
  - *Only 19% of the workforce is fully engaged (52% partially engaged and 29% disengaged); they outperform the partially engaged by 24%*

  The term "talent" has a double meaning, people and the talents they possess. The talent in an organization is what achieves the mission. It is efficient (effective in a timely manner) or it is less than. It is the right talent in the right place or it is misplaced. It is fully engaged, partially engaged or disengaged. It is retained or lost. It performs at a high level or it doesn't. *Organizations compete for it and that competition will increase in the coming years.*

  The arena of Talent Management places significant priority on valuing, developing and engaging of talent in organizations. Organizations who subscribe to the many the *practices* included in the *primary functions* of TM will be in a better position to attract and retain good talent (people) in a world which is forecasted to see a shrinkage of available qualified talent. Furthermore, TM practices result in increased production.

Talent Management performs the following functions: Competency Management, Succession Management, Talent Acquisition, On-Boarding, Learning & Development, Performance Management, Compensation, and Knowledge Management. Participants in this session will explore all of the above, TM practices and functions, plus: TM Maturity Levels; Bersin & Associates - The TM *Consumer Reports*; TM Software: Past, Current and Future Direction; Data Integration; Analytics; and then some.

(Pre-designed) Management & Leadership Development Series

Every management position, no matter what level, no matter what organization, incorporates both management and leadership competencies. No position is a management position without any leadership components, and no position is a leadership position without any management components.

The management competencies are the *body and structure*. They facilitate the performance of the "technical" functions of management; Plans, Organize & Perform, and Controls.

Leadership competencies are the *heart and soul*. They establish the workplace culture. These include competencies such as communications which engage employees and inspire their inner motivations to perform and be innovative.

Based on actual observations are some managers better at or focus more on the management competencies and are less proficient or focus less on the leadership competencies; and visa versa? Yes; and therefore, they should work to improve their other competencies.

A. Leadership: *The Heart & Soul*

- Engaging Employees (One Day Course)

    Inspiring people to follow (leadership) involves a number of philosophies, competencies, and methodologies. Engaging employees and keeping them engaged requires a combination of these beginning with a clear, concerted picture of the mission and values of the organization. In addition, efficient communication practices are at the core of inspiring, impactful leadership.

    This course is designed to develop the leadership competencies and methodologies to ensure consistent mission messages, to align personal leadership values with organization values and leadership practices, to increase awareness of employee morale and engagement, to quit "putting out the fires", and to communicate efficiently and effectively to achieve the mission while increasing or maintaining employee morale.

    1. Organization, Department, Unit…Mission Statements
    2. Creating a Leadership Culture: Organization "Core" Values
    3. Your Leadership & Management Values and Their Alignment with the Organization's
    4. Leadership Integrity: *Practices Reflecting Values*
    5. Motivation v. De-Motivation: Minimizing "Public Sector Turnover" *(the body is here, but the soul has left)*
    6. Reading, Not Labeling Employees
    7. Communication Strategies and Tactics
        h. Engaging Employees
        i. Communication Values
        j. Situational Leadership
        k. Coaching v. Directing
        l. Communication Roadmap: Creating Efficiencies in Communication
        m. Discussion Worksheet: Design for Results
        n. Leadership "What-If Mind Drills" – Case Studies in Communications

- Inspiring "Excellence" (Two One-Day Courses)

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    b. Teams: Business Families - *Functional v. Dysfunctional*
    c. Practicing Integration with Other Teams; Evading *Silos*
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    e. Leading Through Team Changes and Maneuvering *Through* Conflict
2. Change as a Norm; Inspiration of, Generation of, and Enhanced Responsiveness to
3. Creating a Continuous Improvement Culture: Initiating and Inspiring Creativity and Innovation; Benchmarking; Best Practices; Organizational Mentors…

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4. Workplace Diversity; From Tolerance to Appreciation to "Facilitation" – 1 day

- **Leadership & Boundaries:** *To Know Them is to Love Them* (One Two-Day Course)

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    a. Your Roles and Responsibilities
    b. An Overview (Discrimination, Safety, Labor, Family Protection, Privacy, ORC 124, OAC 123…)
    c. Investigations
3. Policies and Work Rules
4. Union Contract

B. Management: The Body & Structure

- **Planning** (One Day Course)

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    a. Personal Brilliance
    b. L&D Architecture: A Learning System
    c. Individual Development Plans
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    f. Mentors and Structured OJT
    g. Delegation
    h. Management Modeling and Reinforcement
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1. Organizational Structure; Work-Flow…
2. Process Improvement
3. Delegation
4. Organizational v. Individual Time Management
5. Meeting Management
6. Project Management

- Controlling (Two One-Day Courses)

Management control is frequently thought of as holding people accountable, putting the hammer down, tightening the reigns, and on and on. In fact, more control is achieved when management establishes an effective list of key performance indicators, establishes clear expectations, conducts periodic audits (NOT micromanaging), provides effective performance feedback, assists in problem solving, and enforces consequences when necessary and consistently.

These courses will teach all of the above and provide communication methodology to do so most effectively. It will include case studies and "dress rehearsals."

1. Key Performance Indicators: State, County, and Yours
2. Standards: Regulations…
3. Performance Management: Measurement, Feedback, Improvement Plans, Documentation…
4. Corrective Action
5. Problem Solving
6. Decision Making and Decision Changing

Performance Management

- **Goals & Objectives**

  This course is intended to help individuals and those who manage or coach others (e.g. employees and clients) to achieve more through the effective setting of Goals and measurable Objectives, the development of plans, and the use of follow-up tactics.

  By the end of the session, participants will be able to…
  1. Explain the difference between Goals and Objectives and their impact.
  2. Explain the impact of *written* goals and objectives.
  3. Develop goals.
  4. Help others to develop goals.
  5. Develop objectives.
  6. Help others to develop objectives.
  7. Create a plan to achieve objectives which will result in progress toward goals.
  8. Design follow-up activities to incorporate into plans that will increase the probability that the goals and objectives will be achieved.

- **Hiring Systems**

  This course is designed for Executives and Senior Managers and the HR Functions of an organization to understand the affects of Hiring Systems on the 'bottom line'. It will examine the many components of a hiring systems, such as, applications, competencies required – 'qualifications', selection criteria, selection tools, background screening, medical screening, and making 'the decision'. Finally, it will explore related laws; what they facilitate and enable and associated legal liabilities.

- **Multi-Tasking: Managing Multiple Projects, Objectives & Deadlines**

  Managing time or becoming more efficient is a performance issue for all workers as well as one for managing workers. Frequently, it can become one of overcoming lifelong learned habits. This can be particularly difficult for the aging population. In this course participants will learn how to identify practices to change and how to change them. Throughout the course we will examine items indicated by a * to explore how these are different when working with the aging population (elderly and vulnerable adults).

  This workshop will address the following:
  1. Analyzing How You Currently Spend Your Time – Time Wasters & Underutilizers*
  2. Changing a Mindset
  3. Time Blocking v. "To Do" Lists*
  4. Highest Priorities First - *Always**
  5. Reducing Interruptions*
  6. Setting Objectives*
  7. Planning in Writing
  8. Meeting & Telephone Management*
  9. Color Coding
  10. Notebooks
  11. Filing for Quick and Reliable Access
  12. Efficient Communications*
  13. System for Flagging Deadlines
  14. Making Efficient Use of 'Help' (e.g. assistants)*
  15. Holding People Accountable*
  16. General Time Management Practices*
  17. Setting Project Benchmark and Deadline Dates
  18. Controlling Work & Projects
  19. Organizing for Project Success: People for a Successful Project – The Team
  20. Selecting Projects - Fit the Mission and Everyone Understands the Commitment That's Necessary

  Finally, competencies and skills achieved in all in all twenty of line items above will enhance an APS workers efficiencies and effectiveness and, thus, their ability to serve the elderly and vulnerable adults in providing all services associated with the programs targeted at the elderly and vulnerable adult population of Ohio.

- **Performance Management I**

  This course builds skills needed by management to most effectively lead and manage employees for excellent performance. These skills will impact the level with which services are delivered to customers, such as timeliness, accuracy, and customer impact.
  It covers the various factors which impact performance; how to clarify and communicate performance expectations; how to measure, document, analyze, and give feedback on actual performance; and understand and reduce the legal risks associated with performance

Objectives:
1. Exploring the many factors impacting performance
   a. Leadership
   b. People
   c. Processes
   d. Materials
   e. Resources
   f. Regulations
2. Getting to clarification and agreement on performance expectations/standards and roles in their achievement; *Articulating the Job: All of It*
3. Measuring performance, observations, and other data, capturing it and tracking it
4. Analyzing performance measurements; individually and trends
5. Risk management; ensuring consistency in measurements and the application of expectations/standards
6. Performance feedback; day-to-day and periodic summaries
   a. Development tool
   b. Valuing employees
   c. Job Satisfaction
   d. Importance of Immediate
   e. Frequency
7. Making feedback communications *EASY*

• Performance Management II

This course builds skills needed by management to most effectively lead and manage employees for excellent performance. These skills will impact the level with which services are delivered to customers, such as timeliness, accuracy, and customer impact.
It covers how to effectively and positively hold people accountable; how to build a culture of motivation; different methods to use to correct performance which does not meet expectations/standards; how to minimize management behaviors which demotivates employees; how to more effectively implement process change mandates; and how to create and manage a culture of innovation.
Objectives:
1. Accountability; Do's and Don'ts
2. Celebrations and other strategies to develop a *culture of motivation*
3. Corrective actions
   a. Timely confrontation
   b. Coaching
   c. Other L&D
   d. Problem Solving
   e. Consequences
4. Avoiding *demotivation*
5. Process Mandates: Parallel Path Implementation
6. Process Improvements; Innovation
   a. Awareness, Curiosity, Focus, and Initiative
   b. Employee Engagement

• Performance Management III

County and State Departments of Job & Family Services have a much restricted budget for the implementation and administration of the services provided to the public. In addition, any work done below standards for whatever reason consumes resources with little to no ROI; basically a waste of time and funding.

Therefore, performance improvement knowledge and tools such as problem solving competencies and methodologies have the potential to achieve greater performance results with the same resources. In addition, it can result in less frustration for the workers, which will reduce virtual turnover, and further increase the performance of the workers; win-win-win for workers, the agencies and the service recipients.

Problem Solving/*Opportunities for Improvement*: Create a Welcoming, "Can Do" Culture
1. Explore Existing Business Models for Problem Solving
   a. Six Sigma
   b. Personal Brilliance
   c. CVMR
   d. University of Houston
2. Create Your Own Problem Solving Model
3. Case Studies for Problem Solving

- **Performance Measurement, Documentation, Feedback and Accountability**
  1. Performance Management
     a. Philosophies/Values: Risk Management, Employee Development, Succession Planning, Overcoming "Skilled Incompetence"…
     b. Methodologies
        i. Feedback Made EASY
        ii. Performance Sampling: A Scheduled Methodology
        iii. Multiple Managers in Same Evaluation Period
        iv. Feedback Track
        v. Progressive Discipline in Performance Feedback Documentation
  2. Corrective Action and Progressive Discipline
     a. Philosophies: Risk Management: Entering The Swamp of Corrective Action & Progressive Discipline
     b. Methodologies:
        i. Overcoming Past Practice/Precedence
        ii. Documentation
        iii. Feedback Made Easy
        iv. Communication Worksheet
        v. Points of Authority (internal v. external); Factors Impacting Authority Decisions; and the Influence on Your Integrity

- **Performance Measurement Systems – *Improving Performance & Maintaining Morale***
  This course is designed for Executives and Senior Managers and the HR Functions of an organization to learn: to evaluate options of Performance Measurement systems; to design a system; and to implement and maintain the system. The course will explore the purposes or system objectives, the three primary categories of performance, the components of a performance measurement system, phases of development and implementation, and how to monitor the system's performance. Finally, it will explore related laws; what they facilitate and enable and associated legal liabilities.

Succession Planning

- **Succession Planning**
  Succession Planning is an HR Performance Management system. It provides a model to guide most management decisions which impact the effectiveness of both Counselor and Social Worker functions, from methods of service delivery to staff learning and development programs, from performance management systems to employee retention strategies, from strategic planning to competency modeling, and on and on.
  1. Be able to explain the complexity and interconnectedness of a fully effective "strategic" Succession Planning & Management system, and be able to draw a system as part of the explanation.
  2. Be able to explain the "legal" framework within which a Succession Planning & Management system in the civil service arena must operate.
  3. Be able to explain in depth the subsystems and tools of the four primary components of a Succession Planning & Management system.
  4. Be able to design a "strategic" Succession Planning & Management system and tools that should and can be incorporated within their business "culture".
     Be able to explain a Critical Succession Plan and how it can be used within the civil service arena.

- **Succession Planning: A System**
  One Day Curriculum**:**
  In this course participants will learn a holistic approach to succession planning including the many factors that impact succession planning, a model succession planning system and its components, the tools, and the benefits.
  In addition, they will learn about Critical Succession Plans including how to identify critical positions (criticality factors) and what a critical succession planning package should include and how to develop (e.g. Determine the best sources of immediately available, qualified candidates ("Immediate Backups") to temporarily fulfill each Critical Job; Create a list of at least two (preferably three) Immediate Backups and include emergency contact information, qualifications, time limits on availability (when and for how long), Determine 'Permanent' fill sources with all contact information; and Determine selection criteria and develop selection tools.
  Objectives:
  1. *Be able to explain the complexity and interconnectedness of a fully effective "holistic" Succession Planning & Management system, and be able to draw a system as part of the explanation.*
  2. *Be able to explain the "legal" framework within which a Succession Planning & Management system in the civil service arena must operate.*
  3. *Be able to explain in depth the subsystems and tools of the four primary components of a Succession Planning & Management system.*

4. Be able to design a "holistic" Succession Planning & Management system and tools that should and can be incorporated within their business "culture".
5. Be able to explain a Critical Succession Plan and how it can be used within the civil service arena.

Two Day Curriculum**:**
The two day curriculum includes the entire one day curriculum plus it incorporates a number of exercises that helps management to:
1. Evaluate their current strengths and weaknesses of succession planning;
2. Evaluate opportunities for strategy changes and forecast their impact;
3. Establish priorities for change to create a Succession Plan;
4. Determine roles of each member of organization in the Succession Plan; and
5. Develop a "draft", two prong approach Succession Plan.

- **Succession Planning: Your Responsibilities & Your Opportunities**
  This session will explore what Succession Planning (SP) is, the many interconnected factors, the components of it, the impact of ODAS and Civil Service, and what your roles should be. In addition, due to the vast projected turnover in government jobs over the next five years, there will be unbelievable opportunities for those who will remain if you make use of the system. Learn some of the steps to take to improve your chances of moving up.

  Objectives – Upon completion of this course, participants will be able to:
  1. Explain the purpose and benefits of Succession Planning (SP)
  2. List and explain the primary components of SP
  3. List and explain the sub-components of SP
  4. Explain "interconnectedness" as it relates to SP and all of its primary and sub-components
  5. List their roles as they see them now, and the research necessary to clarify their roles
  6. Determine the positions that will most likely be available, what the responsibilities will be for each position, and what the nature of the jobs will be
  7. Determine what knowledge, skills, abilities, and competencies will be required
  8. Determine how candidates will be assessed (e.g. past performance v. KSAC's), what type of assessment tools will be used, and who will assess the candidates
  9. Conduct a current KSAC "gap analysis" on themselves (their perception and other's)
  10. Establish a plan to close the gap on their KSAC's (e.g. courses, internal project learning opportunities, mentoring/coaching, and Personal Brilliance
  11. "Move in front of the pack" with good reason

Continuous Performance Improvement

- **Organizational Change: Understanding the Process and Your Roles**
  The work environment/culture of an organization directly impacts the behaviors and performance of SW's, and therefore the results achieved with their cases. Management and Leadership practices have the greatest impact on the work environment/culture of agencies. Management's inconsistencies are a part of their practices. This course will explore engaging staff in the process (obtaining their input about the inconsistencies which have the greatest negative impact on their jobs and the practices that would positively impact their jobs), how their resistances to change may negatively impact the change process and the outcomes for staff; and of the many factors that management must consider when identifying new management practices.
  In this course staff will learn:
  1. The process of organizational change
  2. Their role; engaging them in the process of input
  3. What an organizational change process looks like and how they can constructively influence it
  4. About organizational resistant: identify theirs and how to constructively process them
  5. How to help identify management inconsistencies and their true impact on staff
  6. Different parameters (employment laws, budget limitations…) that exist when identifying management practices to replace the inconsistencies

- **Organizational Change I: Resistance, Parameters, & Priorities**
  The work environment/culture of an organization directly impacts the behaviors and performance of SW's, and therefore the results achieved with their cases. Management and Leadership practices have the greatest impact on the work environment/culture of agencies. Management's inconsistencies are a part of their practices. This course will explore Management Inconsistencies and the need to curtail them, how to implement this and other organizational changes including overcoming organizational resistances and setting priorities, and explore other parameters influencing change and management practices such as employment laws which guide management practices.
  In this course managers will learn:

1. The different ramifications of management inconsistencies
2. How to explore and identify actual management inconsistence within their agencies
3. The best process to change, curtail the inconsistencies, including identifying and overcoming the resistances to change of management and staff
4. Employment laws compliance requirements and how this relate to management inconsistencies and identifying new management practices.

- **Organizational Change II**
  The work environment/culture of an organization directly impacts the behaviors and performance of SW's, and therefore the results achieved with their cases. Management and Leadership practices have the greatest impact on the work environment/culture of agencies. Management's inconsistencies are a part of their practices. This course will explore Management Inconsistencies and the need to curtail them, how to implement this and other organizational changes including overcoming organizational resistances and setting priorities, and explore other parameters influencing change and management practices such as Management Models and Communication Values and Methodologies which guide management practices.
  In this course managers will learn:
  1. How to analyze, prioritize and select organizational defenses for which to focus solutions
  2. What solutions to use to address different organizational defenses
  3. How to integrate staff input on management inconsistencies with management's identification of management's inconsistencies; prioritize the need for change; and implement change practices and reinforce the changes
  4. To explore and select from a variety of different leadership models, values and practices for integration into their agency or design new ones
  5. Communication values, competencies and methodologies to practice to strengthen the work environment/culture and to improve project and agency performance.

Learning & Development

- **HRD – Training & Development for Results**
  This course is designed for Executives, Senior Managers and the HR Functions of an organization to improve the efficiencies and effectiveness of staff development. It begins by examining the importance of HRD relative to the 'bottom line' and all of the different activities within an organization which influence staff development (e.g. Day-to-Day Management Behaviors, Practices, and Focuses – *What you Do v. What you Say*). It then explores some of the components of the system, such as, Structured OJT, Classroom Learning, What If – Mind Drills™, Job Performance Aids, Management Coaching and Reinforcement, Holistic Learning Systems, Instructional Design, and HRD Effectiveness Measurement and Analysis. Finally, it examines the design of an elaborate Human Resources Development system.

- **Learning & Development (L&D) for Impact (Student and Business Performance)**
  This curriculum is designed to train L&D professionals in both curriculum design and development and in delivery. It uses ADDIE+R methodology designed by Michael McVey. This can be used to design highly technical curriculum to "soft" skills curriculum. Due to the primary objective of this curriculum, it is a three day curriculum with pre, post and between class assignments.

  The outline for this course is:

  I. Adult Learning Styles
     A. Basic Styles
     B. Generational Trends
     C. Learning Style Inventories
     D. Instructional Facilitation

  II. Instructional Systems Design (ISD)
     A. Blended Learning Tools
     B. ADDIE for "Curriculum" Development
        1. Analyze
           a. ISD Goals and Objectives
           b. Competencies Required: Applications, Levels of Proficiencies, Learning Practices…
        2. Design – Learning Activities, Tools, Process/Phases,
        3. Develop – Production of Lesson Plans and Learning Tools
        4. Implement – Instruct: *Let the Games Begin!*
        5. Evaluate – Measure Behaviors & Business Outcomes

  III. Classroom Culture that Enhances Learning

A. Obstacles to Learning
B. Creating and Nurturing Curiosity
C. Coaching for Learning
D. Five Basic Principles for Instructors

IV. Designing OJT Reinforcement/Support Mechanisms for the T&D function and for the management team of the participants

V. Logic Models for the Learning Function
    A. A Tool for Managing the Impact of L&D

- **Mentoring Skills**

Mentoring is often about a system, process or competency SME (Subject Matter Expert) utilizing instructional talents with one to eight individuals in a non-classroom environment to help them learn one or more talents (competencies, skills...) to perform work activities. It is usually conducted to first learn talents or to increase the proficiency level of talents. Also, it is most effective when it is a structured (designed or planned in writing) learning activity which often offers unstructured learning opportunities as well.

The mentoring process is not only beneficial to the individuals learning or enhancing talents, but to the mentor also. In every mentoring situation, mentors reconfirm and enhance their talents and learn new ones.

Finally, it is beneficial to the organization in a multitude of ways. People learn from those that know best; learning is enhanced. Because mentors are engaged and valued, they increase their motivations and their commitment to the organization; performance and retention is enhanced.

This course is designed to develop the following skills:
    A. Setting Learning Goals & Objectives
    B. Designing Structured OJT for Meeting Learning Goals & Objectives
    C. Designing a Blended Learning Plan consisting of Multiple Plans of Structured OJT
    D. Measuring the Achievement of Learning Goals & Objectives

- **Coaching**

Coaching is a set of talents applied by individuals (often SME's (Subject Matter Experts) in multiple competency arenas) with other individuals who have the skills, competencies, education, experience, and work styles/traits to successfully achieve an objective or set of objectives but are having difficulty.

Basically, with a multitude of strategic questions coaches help others walk through process that help others to evaluate their situation and determine a plan to apply their talents to successfully accomplish their objective or set of objectives.

Often coaches assist individuals who are dealing with situations that vary from simple performance issues such job responsibilities they do not like to complex, controversial and/or highly sensitive work issues involving numerous people.

Coaching curriculum includes subject matter such as:
    A. Active Listening
    B. Powerful Questioning
    C. Engaging Others
    D. Analyzing Words, Emotions, Mixed Messages…
    E. Communication Planning
    F. Problem Resolution Processes
    G. Resolution Brainstorming
    H. Effective Change Planning
    I. Follow Up and Follow Through
    J. Accountability through Consequences