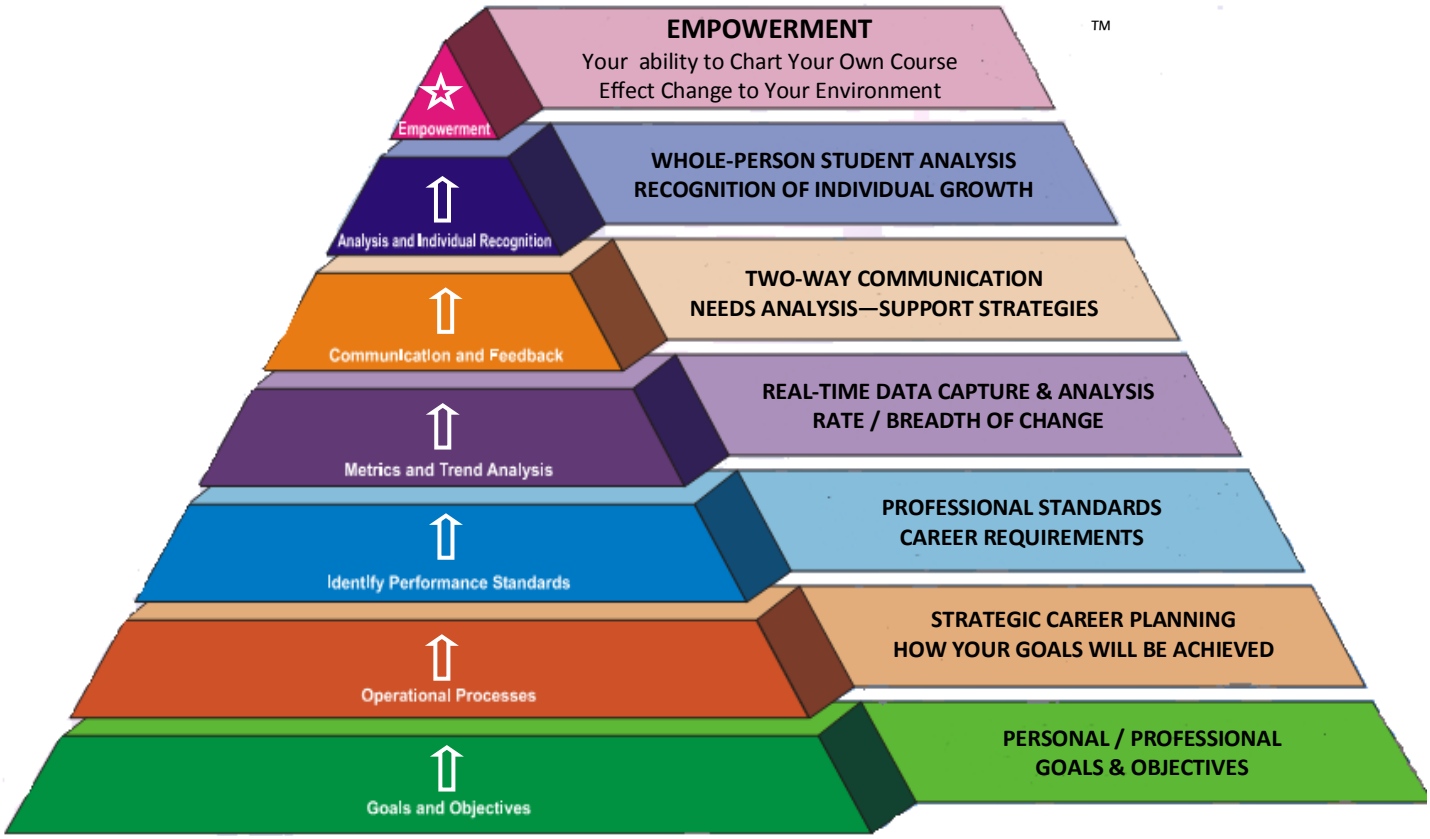
PROFESSIONAL SKILLS WORKBOOK

EMPOWERMENT

Career Planning & Whole-Person Development



"a victorious army first obtains conditions for victory, then seeks to do battle"

Sun Tzu

EMPOWERMENT

PERSONAL / PROFESSIONAL GOALS & OBJECTECTIVES

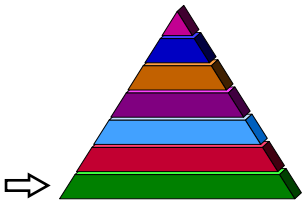
This Empowerment Strategy outlines a seven step process to develop a Personal & Professional framework that focuses on your daily Performance & Strategies that support achievement of your goals & objectives. The development process is as follows;

All efforts must start with;

- Clearly defined goals as tangible outcomes, easily recognized when achieved
- a clear understanding of immediate & long-range objectives

The above will determine;

- goals & achievement milestones
- individual responsibilities
- Objective measurements to track performance overtime



Pitfalls for Goal-setting w/Remedies;

- **Increased Stress**
  - Education / Training
  - Exercise greater control
  - Eliminate ambiguity of outcomes sought
- **Fear of Failure**
  - Eliminate violations of the Code of Conduct
  - Treat goals as guidelines, their accomplishment as Milestones
  - Seek Continual Improvement of all Daily Routines
- **Goals as Ceilings**
  - Challenge your abilities
  - Pursue well-designed / well administered incentive systems
  - Ensure you understand your place in all environments
- **Short-Range Thinking**
  - Avoid focus on short-term results at expense of long-range goals
  - Step-by-Step plan of how Personal & Career Goals will be Accomplished

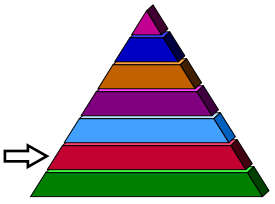
Interpret daily requirements as individual performance standards

CAREER PLANNING

- Translate meeting personal requirements into effective daily routines
- Clear understanding of skills, knowledge & training needed to meet career goals

The avenue for change is skills proficiency & development of Daily Routines that;

- add value,
- promotes continuous improvement
- provides personal / professional synergy, congruency, etc.



Good Habits / Daily Personal Routines & Empowerment go hand-in-hand to produce the personal change & growth necessary for continual improvement.

Through increased awareness, skill enrichment & personal skills development, you will more clearly understand career goals, interrelationship of various skill capabilities & how each developmental milestone met contributes to Self-Actualization.

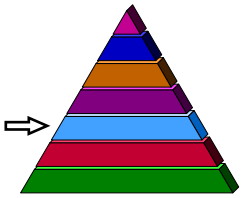
Professional Development

- Clearly identify training requirements, areas of special need
- Alignment of needs to resources; computer, money for college, investments, etc.
- Acquire Recognized / Accredited Professional Development training

Truth cannot apply to something conflicting with itself; what it affirms it must also be

Plotinus

Individual Standards, Performance Requirements



PERFORMANCE STANDARDS; defined / translated into personal habits, daily routines, career planning & preparation, etc. in the following areas:

- determination of specific education and training needs
- strategies for individual development, education & professional training
- alignment of instructional plans / practices with appropriate skills development
- recognition of individual performance ***(milestones)*** in support of career goals
- linkage of IEP support practices to key performance results
- consideration of safety / well-being, e.g. learning environment, Quality of Life, etc.
- Data-driven decision making to improve IEP outcomes, areas of support, etc.

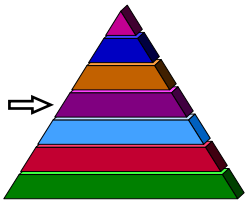
PERFORMANCE PLANNING: Individual performance should not a measurement of itself, but always in the achievement of a tangible & objectively defined goal.

- Identifying specific individual performance requirements
- Adopting principles of Continuous Improvement
- Describing Career Goals in terms of the Skills required for Proficiency
  - identify necessary skills, resources & performance guidelines
- Clearly determining developmental benchmarks / Milestones of Achievement

Create a Mental Environment that Fosters Performance Excellence

EMERGENCE; the adaptation & change leading to new goals & approaches

- Gain Active Involvement
- Build Collaborative Links across Teams / Functions
  - Link Individual Performance(s) to common Goals / Objectives
- Manage Change
- Encourage Innovation



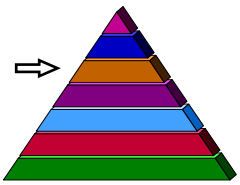
Metrics, Trend Analysis

KEY INDICATORS OF PERSONAL GROWTH & DEVELOPMENT

- trends to show rate of Career Growth: acquiring skills, experiences, milestones, etc.
- trends to show rate of Personal Growth: determined effort to excel, e.g. personal habits, positive daily routines, social standards, etc.

NOTE: To assign a quantified value, you must have an Well-defined Expectation

- Are you meeting your own Expectation???

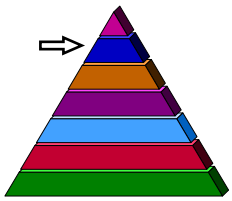


Feedback / Needs Analysis

COMMUNICAITON / NEEDS ANALYSIS—mutually dependent in the identification & management of obstacles that prevent you from achieving your objective.

- Establish Numerous Lines of Communication, Sources of Information, etc.
- Expand depth of Personal Relationships,
  - One-on-One
  - Community Groups
  - High performance work teams
  - Professional Associations
- Objectively determine Impact of Limited Resources
  - Time
  - Money
  - Equipment

Analysis & Recognition



If you can objectively define a specific goal or objective, you are able to quantify all aspects of its achievement

CONTRACTING: a personal commitment to the duties & responsibilities required to achieve immediate & long-range goals & objectives.

Contracting for Personal Growth & Development based upon the following:

- **PRE-MEASURES**
  - **Are you able to meet goals???**
    - Predictive analysis based upon capabilities, obstacles / resistance & needs
- **ON-GOING MEASURES**
  - **Using common measure *(e.g. time)* are you able to achieve goals???**
    - Continuous Assessment, comparison of planned versus actual outcome measures
- **POST-MEASURES**
  - **Did you achieve <u>all</u> requirements of your goals???**
    - Review, Performance Audit, Outcome Assessment

Whosoever has a potentiality must first have a character of their own; and its potentiality will exist in their having a reach beyond that character to some other

Plotinus

Examples of "Whole Person" Evaluations

<u>Technical Experience</u>

- **Competence -** Competent job skills
- **Organized -** Proceeds in a systematic and orderly manner
- **Minimally Directed -** Quickly grasps and understands requirements
- **Innovative -** Suggests solutions / improvements to solve problems
- **Attention to Detail -** Exercises exacting standards in job performance
- **Problem Solving -** Overcomes obstacles that impedes job performance

<u>Personal Development</u>

- **Interpersonal Skills -** Communicative abilities / personal relationships
- **Positive Attitude -** Demeanor, professional bearing and temperment
- **Accountable -** Accountable for job performance
- **Self-Development -** Ability to impove skills

The environment has the single most influence on performance

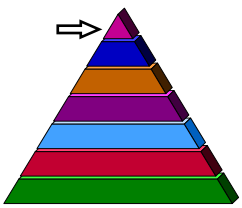
<u>Communication</u>

- **Listen -** Ability to listen and interpret data
- **Clear -** Clarity of written / verbal communication
- **Timely -** Adherence to time constraints
- **Accurate -** Accuracy of information

<u>Management / Leadership</u>

- **Planning -** Meeting objectives through well conceived actions
- **Organizing -** Ability to manage diversed resources to optimum results
- **Team Building -** Inclusion of the talents and abilities of others
- **Synergy -** Follows a collaborative approach to problem solving
- **Renewal -** Understands the concept of Wellness, balances in life

EMPOWERMENT



Empowerment is the freedom, responsibility & accountability to act within a set of guidelines that define one's authority to make decisions & generate actions that are known to be supported

The ultimate goal is Cognitive Self-regulation; refers to a student being actively engaged in his or her own development. This includes analyzing the demands of task assignments, planning for & mobilizing resources to meet demands & monitoring their progress toward completion of as-signed tasks

COMMUNICATION

Primary Management Communication Competencies

- ◊ Written / Verbal Communication Skills
- ◊ Active Listening
- ◊ Interpretation of Data
- ◊ Responsiveness to Feedback
- ◊ Developing / Mentoring Subordinates
- ◊ Setting / Reviewing Objectives
- ◊ Acceptance / Delegation of Responsibility
- ◊ Defining Individual / Shared Responsibilities
- ◊ Analysis and Information Management
- ◊ Resource Management
- ◊ Effective / Deliberate Action Planning
- ◊ Collaboration / Team Building
- ◊ Motivation / Commitment

If you are lost in silence, risk speaking up. If you are lost in words, risk being still.

Primary Leadership Communication Competencies

- **DIRECTING** - explicit instruction of what, when, why & how. It is a structured supervisory style allowing greater control of subordinates.
- **COACHING** - general instruction of techniques, observe performance
- **SUPPORTING** - mutually agreed upon requirements fulfilled by the subordinate & monitored by the supervisor
- **DELEGATING** - subordinate is EMPOWERED, given minimal instruction & a clear understanding of what is sought

The four styles above are developmental steps toward Empowerment; individual action in support of the common goals & objectives of the organization.

Active Listening

The first step to Active Listening is to recognize the need, tips to active listening;

- **Prepare to Listen** - being conscience of the need to listen. Taking the necessary steps to involve yourself with the listening process.
- **Take Effective Notes** - Listen for main points and data to supporting ideas. Taking notes allows you to link important information.
- **Listening to gain ammunition for rebuttals** - contrary view-points limits your ability to fully accept another's ideas
- **Listening Actively** - Listen from the viewpoint of others. Interpret both verbal and non-verbal messages of the speaker.
- **Understand the limitations of your perceptions** - Clarify the accuracy of your understanding by rephasing, paraphasing and asking questions.
- **Resist temptation** - Be flexible and open-minded in understanding and accepting the beliefs of others.
- **Take advantage of thinking-speaking time differential** - We think at a rate of 400-800 words a minutes and speak at 100 words a minute.
- **Passive or active participation** - Take an active role in the communication process as a participate, not an observer.
- **Breaking down barriers** - Regard listening as a valued experience, an opportunity to learn and grow.
- **The Road Less Traveled** - Learn from other's mistakes as well as successes, a valuable concept for management.

COMMUNICATION

TEAM BUILDING

Ideal team dynamics are those that identify & resolve problems as they appear. The following are 10 essential elements of effective team dynamics:

- **Clarity of Team Goals** - a clear vision of what is required & the steps to achieve it
- **An Improvement Plan** - Methods and operating procedures used to determine what is needed, available, scheduled events & milestones.
- **Clearly Defined Roles** - Improves operational efficiency by tapping the talents of team members, clarifying individual responsibilities
- **Clear Communication** - The team's abilty to effectively communicate & exchange information. Clear two-way lines of Communication
- **Beneficial Team Behaviors** - An effort by team members to use individual skills that make meetings & other exchanges more effective.
- **Well-defined Decision Processes** - An awareness of the various methods the teams uses to reach decisions
- **Balanced Participation** - Level of participation / shared decision input
- **Established Ground Rules** - Mutually established rules of the group
- **Awareness of Group Processes** - Understanding of group processes
- **Use of a Scientific Approach** - Relience on data for problem solving & decision making.

Key Steps of Delegation

- **Evaluate delegation needs -** evaluate the distribution of work assignments… generate a list of "delegation opportunities"
- **Prepare to delegate assignment -** draft task objectives, performance measures & available resources...plan specific follow-up & control procedures where possible
- **Make the work assignment -** define objectives / performance measures with employee...identify resources & available support
- **Follow-up -** provide coaching, counseling, feedback and resources as needed… give positive & negative feedback
- **Evaluate the completed work and the process -** review/evaluate completed work with delegatee...document performance

Development of the mind is through perceiving finer & finer meaning, being able to make more exacting distinctions

THE SCIENTIFIC PROCESS;

- employs systematic, empirical methods that draw on observation or experiment;
- requires data analysis that are adequate to test the stated hypotheses, justify conclusions drawn;
- applies measurements that can be validated across multiple studies by the same or different investigators;
- Critical inquiry based upon logic & a systematic treatment of evidence;

MANAGEMENT / PLANNING TOOLS

Understand that the greatest Continuous Improvement tool is a Suggestion

BRAINSTORMING: a process for generating numerous new ideas by opening expressing thoughts & ideas & building upon ideas raised by others.

- Begin Brainstorming session only after appropriate mood has been established
- Addressing a topic, member's verbal suggestions are captured on flipcharts, etc.

The following are Brainstorming rules;

- Withhold all judgments of ideas
- Encourage wild & exaggerated ideas
- Build on the ideas put forward by others

Brainstorming sessions often fluctuate from periods of rapid ideas followed by slow, awkward periods. During the slow period, the group should revisit previously suggested ideas, seeking clarify, testing understanding.

LIST REDUCTION: used to process information produced by Brainstorming by creating a common understanding among group members. If needed, the person who suggested the idea would be asked to provide a brief summary. The process also allows the group to reduce the list to a manageable number.

Before the list can be reduced, everyone in the group must understand all entries on the list. The first activity is a review of every entry, each member being asked if there is a need for further clarification. If needed, the person who suggested the idea would be asked to provide a brief summary. The group then agrees on filters from which items on the list may not comply, e.g. within control of the group, worth the effort needed, etc.

A quick & easy method to include the opinions & desires of the group

WEIGHTED VOTING: each is given ***(e.g. 6)*** votes to distribute among options provided.

.

OPTION	**A**	**B**	**C**	**D**
Bob	3	1	1	1
Susan	2	2	1	1
John	1	1	2	2
TOTAL	6	4	4	4

MANAGEMENT / PLANNING TOOLS

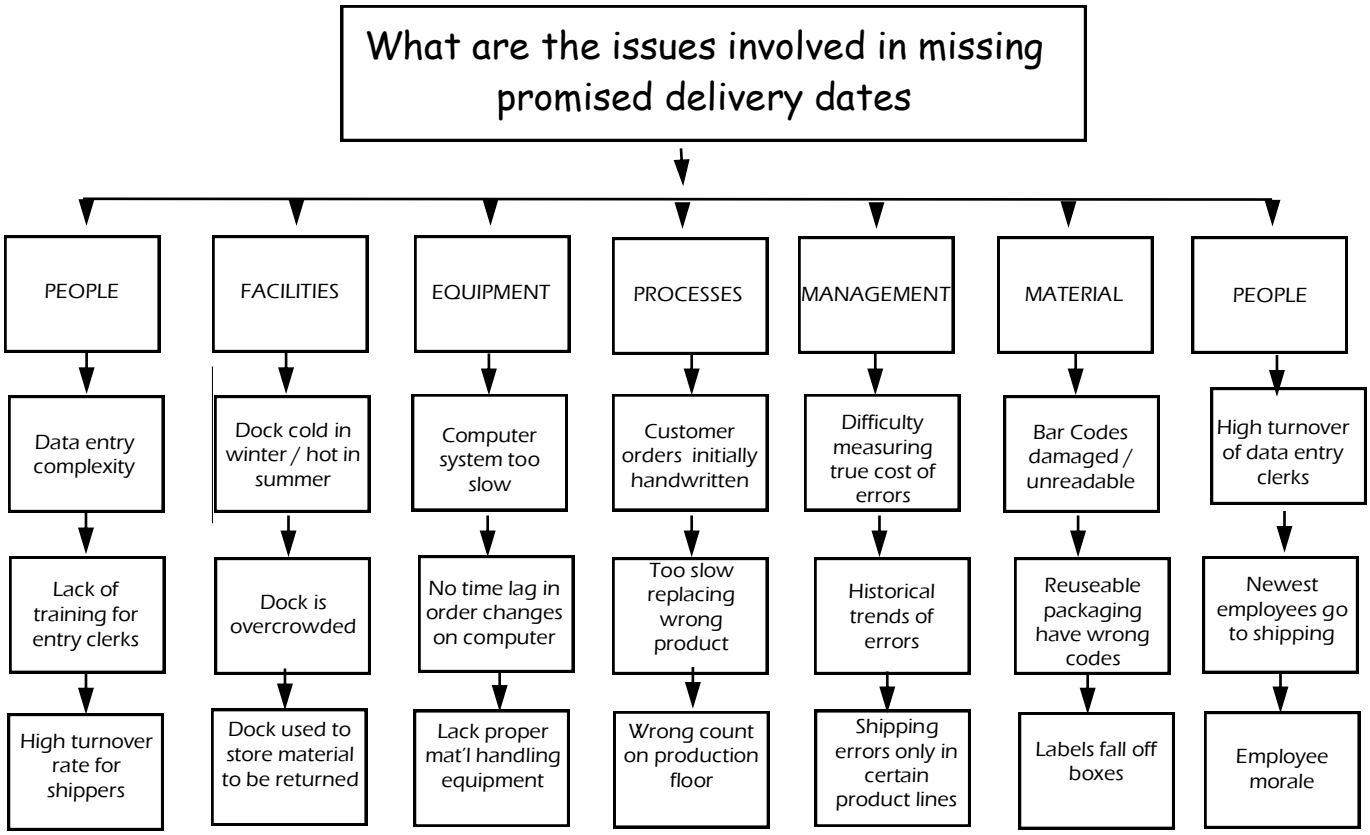
Ignorance more frequently begets confidence than does knowledge

DARWIN

AFFINITY DIAGRAM: used to generate ideas from segments of a grand idea, opinion or issue. Items naturally related are grouped, allowing association by common characteristics. A creative rather than logical problem-solving process, a brainstorming technique that produces consensus by sorting cards rather than by discussion

Affinity Diagrams are used when the team is overwhelmed with a large volume of data & when breakthrough thinking is required to address broad issues or themes.

Great tool for gathering throughts & ideas



MEASUREMENT / METRIC APPLICATIONS

Many factors considered to measuring the results of a process, often depending on the output realized. What is measured is the quantity or quality of the output & its effectiveness, efficiency & timeliness

Performance measures will usually fall into the following three categories as listed below,

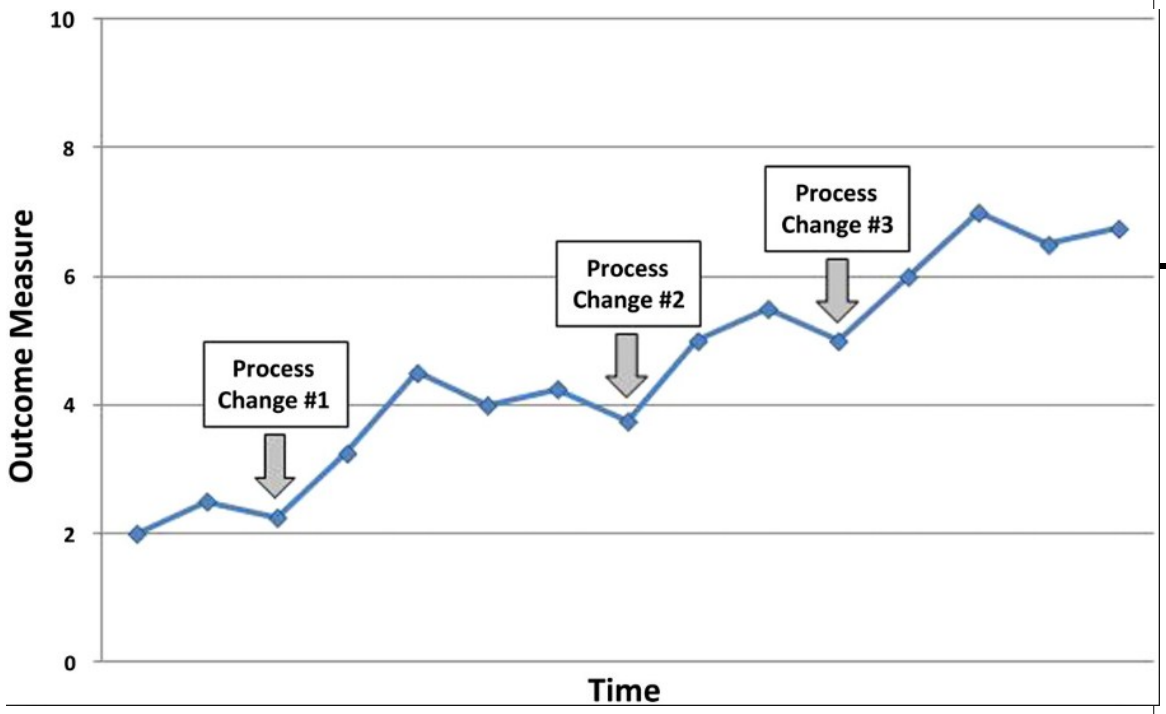
1-What's Measured	**2-How it's Measured**	**3-Measurement form**
1—Quantity	7—Volume	12—Straight Count
2 - Quality	8 - Time	13 - Ratio/Percentage
3 - Effectiveness	9 - Observation	14 - Description
4 - Efficiency	10 - Occurrences	15 - Matrix Analysis
5 - Timeliness	11 - Rubrics	16 - Association/Comparison
6 - Accuracy		

EXERCISE: Review the following examples to determine	**1**-What's measured	**2**-How it's measured	**3**-Measurement Form
Janitorial Duties, ***(dusting, mopping, window cleaning)***	(1) ___**2**___	(2) __**9**___	(3) __**14**___
Printing Press Operator, ***(receiving, processing printing)***	(1) _____	(2) _____	(3) _____
Mechanical Engineer ***(Machinery)***	(1) _____	(2) _____	(3) _____
Child Day-care Employee	(1) _____	(2) _____	(3) _____
Clerk / Typist	(1) _____	(2) _____	(3) _____
Chef, Culinary assistant	(1) _____	(2) _____	(3) _____
Medical Doctor	(1) _____	(2) _____	(3) _____

MANAGEMENT / PLANNING TOOLS

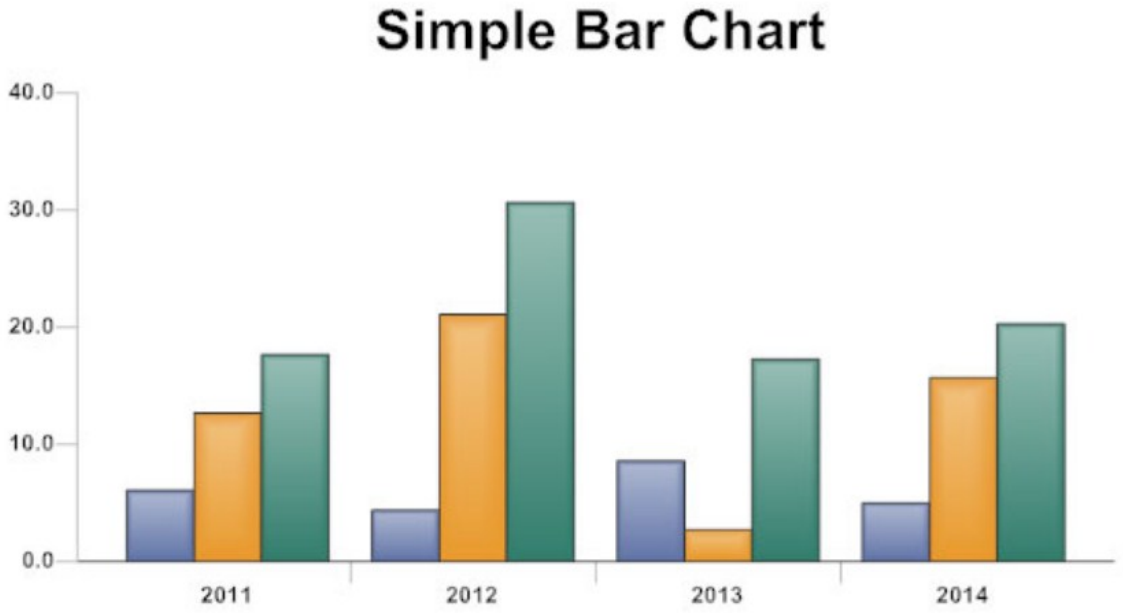
RUN CHART - is excellent in identifying trends or shifts in average. The "X" (vertical) & "Y" (horizontal) axis are measurements of time / sequence respectively.

Run Charts are one of the simplest and monitors the long range average of a process



BAR CHART - visual illustration shows distribution of occurances of a measureable outcome & allows immediate comparisons of information and data. The chart can be used to measure actions, occurances, events or raw process data. Using a Bar Chart allows you to aggregate information and to understand the immediate level of impact to known evaluation parameters.

Shows distribution of the occurrences of a measurable outcome



MANAGEMENT / PLANNING TOOLS

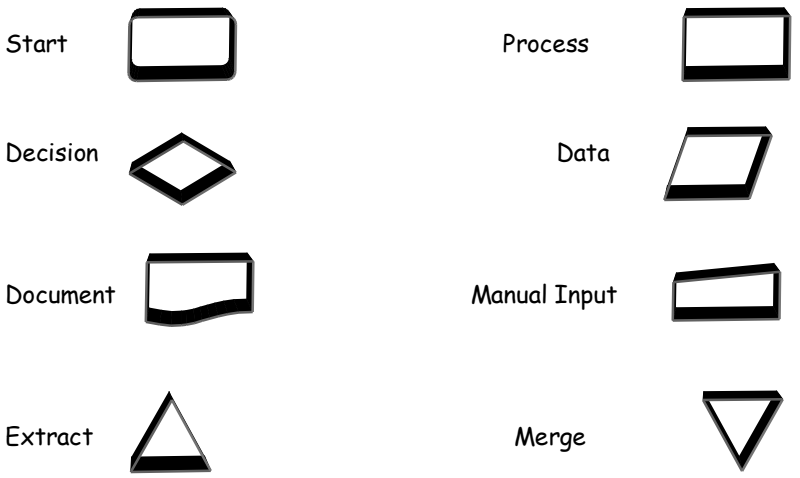
FLOW CHART - Flow Charts are an excellent tool to design or analze processes

- shows the inputs, activities, decision points, outputs of a process

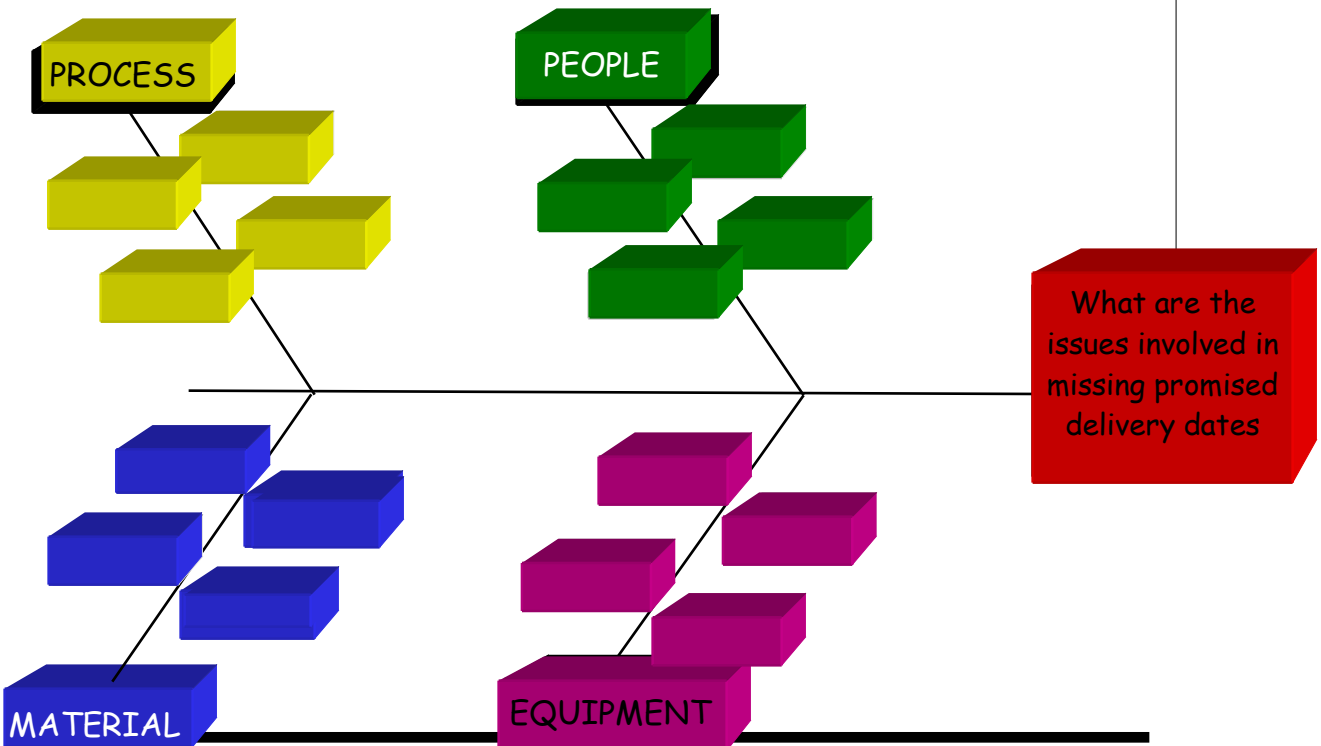
To construct a Flow Chart;

- Identify major activities of the process & decision points during implementation
- All processes have an expected outcome or output
- Follow the chart progress to ensure all contingencies have been taken into consideration.
- Processes are usually more complicated than people realize.

Shows the inputs, activities, decision points and outputs of a process



FISHBONE DIAGRAM - Also known as a Cause-and-Effect Analysis, it is a sysematic process of reviewing effects & the factors that create or contribute to specific Outcomes. The Outcome can either be a problem, solution or objectives of a conclusion sought in a planning process. The Fishbone Diagram allows you to easily illustrate the implementation steps of a plan, factors of a problem or to identify factors that will contribute to its solution.



MANAGEMENT / PLANNING TOOLS

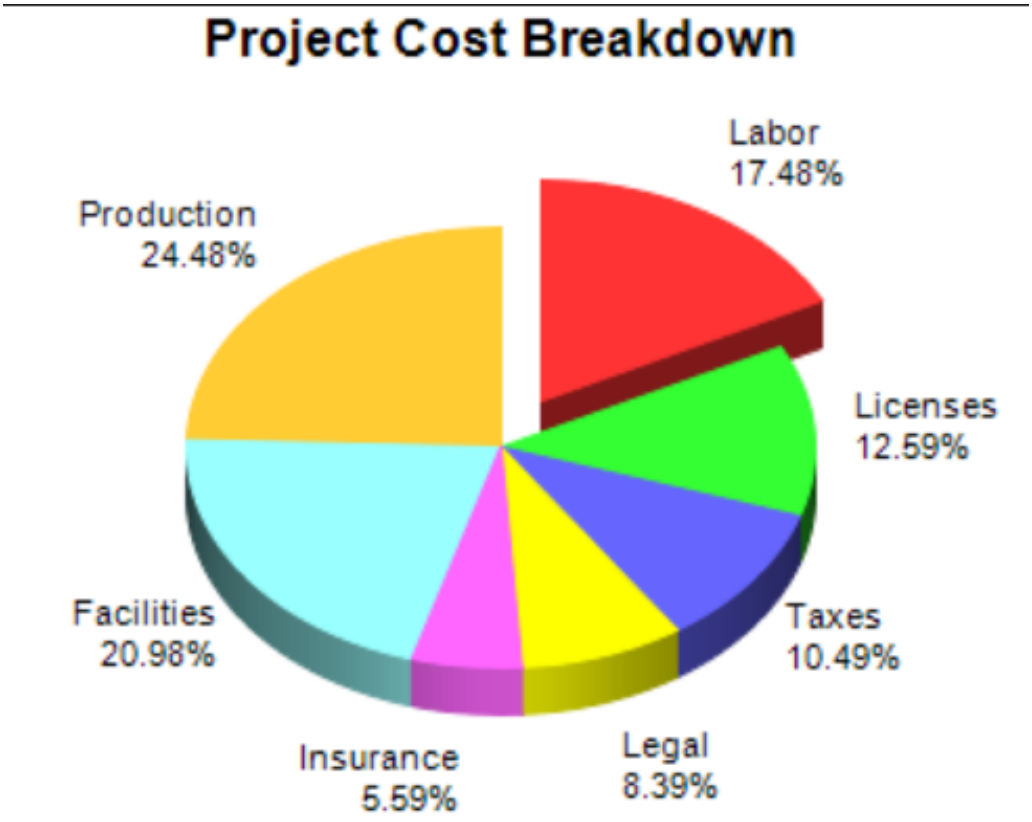
GANTT CHART - a diagram that documents the schedule & events necessary to complete a project or implement a proposed solution. All GANTT charts document what is to be accomplished, by whom & when.

The first step is to show the implementation plan as achievable steps, assign responsibility for each step, determine duration with realistic completion dates

Documents the schedule, events, activities & responsibilities necessary to complete a project or implement a solution

ID		Cafateria Rennovation	Week 1	Week 2	Week 3
1		Solicit Three Estimates			
2		Review Proposals			
3		Select Contractor			
4		Receive Work Schedule			
5		Begin Construction			
6		Order Material			
7		Begin Demolition			
8		Receive Material			

PIE CHART - used to visually illustrate the relationship of each part to the whole, showing its contribution to the total product, process, etc. The 360 degrees of the circle represents 100% of the total. Slices of the Pie represents proportional components of the whole.

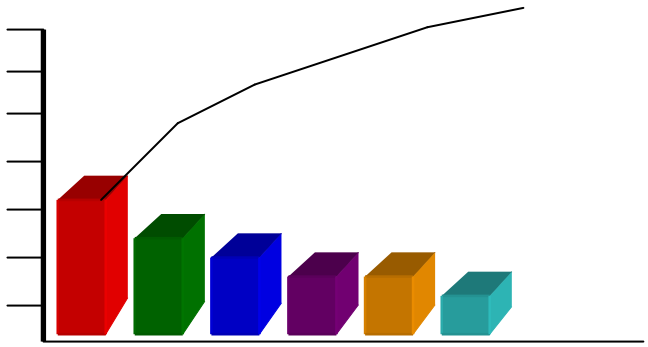


Shows percentages of a whole represented as slices of 100%

MANAGEMENT / PLANNING TOOLS

Chart used to show the significance of influence & help determine which problems to solve in what order

PARETO CHART - Termed Pareto Analysis, the Chart seperates the "vital few" from the "trivial many," pointing out inequalities among measureable factors. The term, "80-20 rule" is an example of Pareto Analysis. It is the ranking of data in order of impact or importance, drawing attention to problems or causes in a systematic method.



(PROBLEM / SOLUTION) SELECTION WORKSHEETS - The worksheets displayed on the next page are used to evaluate various factors of a problem or solution using a systematic analysis process. The Problem/Solution statement is displayed on the top of the form. Each statement is rated in the following categories:

PROBLEM EVALUATION FACTORS

Control - The extent to which the group controls the problem and / or solution.

Importance - The seriousness or urgency of the problem

Difficulty - The relative dificulty of working through the problem to the solution

Time - The relative length of time it will take to resolve the problem

ROI - The expected payoff from solving the problem

Resources - The amount of resources required to solve the problem, (people, time, money, equipment, etc.)

SOLUTION EVALUATION FACTORS

Control - The expected, payoff from implementing the solution (cost-benefit analysis)

Appropriateness - The degree to which the solution addresses the problem

Resources - The extent resources required to implement the solution are available

ROI - The expected payoff from implementing the solution

Time - The relative length of time it will take to resolve the problem

Acceptability - The degree people are involved will accept the changes and the organization's ability to absorb change

PERT CHART - an acronym for "Programmed Evaluation & Review Technique." Originally designed for management of military contracts, the Chart is applicable to any project in any field of management. PERT charts are used to manage complex projects regarding time & cost & identify required activities in a sequencial order of occurance, e.g. "Critical Path." Below is a series of events required to order

(1) Material Request made, sent to Purchasing Department

(2) Material ordered by phone, written confirmation sent.

(3) Material received from supplier

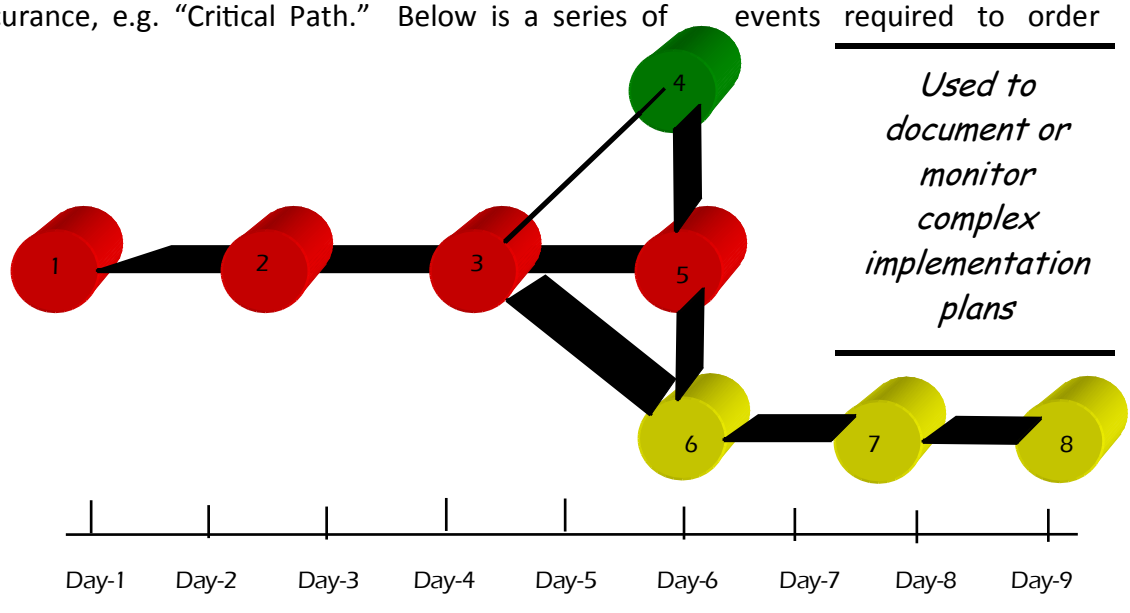
(4) Material audited, receipt of material processed

(5) Confirmation of receipt sent to Purchasing Department

(6) Confirmation of receipt sent to Accounting Department

(7) Material sent to internal distribution

(8) Material received by requesting department



Used to document or monitor complex implementation plans

Process Development

Step 1—Results Sought—Identify what is sought as a tangible Goal / Objective

Step 2—Beneficiary or Process Supported—Identify all customers, individuals & processes

Step 3—Requirements—Identify Exact Requirements of the Customer based upon Design, Timeliness, Cost, Expectation *(e.g. of a Completed Task)*, Quantity, Dimensions, etc.

Step 4—Specifications / Addressing Each Customer Requirements

FORCE FIELD ANALYSIS

CUSTOMER REQUIREMENTS		SUPPLIER SPECIFICATIONS
	→ ←	
	→ ←	
	→ ←	
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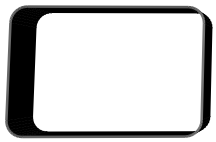
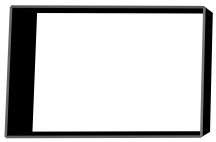
Step 5 - Steps of the Process

Start



Process



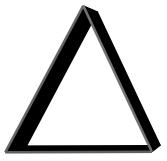
Decision

Data

Document

Manual Input

Extract



Merge

Step 6—Metrics / Performance Measures

PROBLEM SOLVING PROCESSES

Step 1 - Identify the Problem

Correctly identify & isolate the extent, factors & impact of the problem. Use **Brainstorming** to generate as many Problem factors as possible. Use the **List Reduction** tool to reduce the number of possible problems from the list, accomplished by applying filters or combining inputs with similar characteristics. For more complex problems, The **Affinity Diagram** would be appropriate to generate a larger volume of alternatives.

Step 2 - Analyzing the Problem

Efforts should be made to identify key causes that contribute to the problem. Recommend use of the **Problem Selection Worksheet** to break down into smaller problems & identified in measureable terms using quantifiable parameters. Other possible tools are the **Force Field and Cause & Effect Analysis**

You must first define the problem before you can solve it

Step 3 - Generating Possible Solutions

Once the problem has been fully identified, understand that what is intended to be changed as the root cause of the problem. Determine what is to be the end result of the change as the desired solution. As a result, generate as many possible ideas as possible. This is an idea expanding process, thinking out of the box to obtain as many viewpoints as possible. The group should utilize the **Brainstorming** process to involve the entire team in generating possible solutions.

Step 4 - Selecting & Planning the Solution

During this step, the group agrees on the optimum solution & makes plans for its implementation. The group should utilize **List Reduction** to clarify & consolidate the list generated from idea expanding tools used in the previous step. Often there are varying degrees of a solution, determined by addressing those factors that are causing the problem. Involve everyone in the planning of the solution. Recommend use of the **Solution Selection Worksheet**. Recommended tools for planning implementation of the solution are the **GANTT, Flow** & **PERT Charts** along with the **Force Field Analysis**.

Center yourself in all matters by learning to observe passively & act with purposeful intent

Step 5 - Implementating the Solution

When implementing the planned solution, insure those most affected are involved & the implementation process is defined as manageable steps for easier monitoring. All assumptions should be based upon tangible facts. Contingency plans are formulated in anticipation of problems that may be encountered. Ensure everyone understands their role & is committed to the success of the action. Incorporate quantified measures & clear methods to collect data to verify progress. Feedback from those most affected is critical to ensure the solution is satisfying all requirements.

Step 6 - Measuring / Evaluating the Solution

It is essential to measure the impact of the solution implemented & understand effect of the solution on other aspects of the problem as well as whether another problem is created. As solutions are implemented, circumstances & situations change. Individual responsibilities often changes, requiring new or modified skills. As each aspect of the problem is resolved, use the above process to address other factors until the original desired stated is realized. This will close the loop to the Problem Solving Process

MANAGEMENT CATEGORIES

KEY PROJECT CLASSIFICATIONS—*How Projects / Community Initiatives are classified*

- **NEW CAPABILITY** - Management / Organizational Structure / Planning
  - **Description—**New Processes / Programs / Strategies Employed
    - **Outcome** - Development of new process / program / initiative
    - **Measure** – Process Outcomes / Implementation of new Capability
- **PERFORMANCE IMPROVEMENT** - Increased Operational Capability / Competence
  - **Description—**Efficiency / Effectiveness of existing Management Practices
    - **Outcome** - To improve an existing Process / Functional Operation
    - **Measure** – Quantified Improvements from Baseline Performance
- **COMPLIANCE STANDARD** - Consistent achievement of Outcomes Sought
  - **Description—**Conformance to performance Elements / Standards / Requirements
    - **Outcome** – Ability to consistently meet Performance Standards
    - **Measure** – Degree of Compliance / Frequency of Non-Compliance

TASK DESCRIPTION—*How initiatives are defined*

- Identify Goals / Objectives
- Identify Primary / Secondary Customer(*s*) ***(e.g. who benefits from sought outcomes)***
- Identify Key Developmental Milestones
- Identify Objective Performance Measures

PERFORMANCE MEASURES—*How initiatives are designed / managed*

- **Performance Measure Definition**—Define performance measures as an objective process out-come possessing quantified outcome values
- **Office of Primary Responsibility**—Identify group / individual responsible for collecting, analyzing & managing outcome data
- **Calculation Formula**—Standardized criteria of how results are calculated from various data sources to provide objectively quantified outcome data
- **Data Source(s)** - Formally established sources where performance / outcome data is generated & maintained
- **Frequency**—The frequency data is calculated over a specific period of time, e.g. Daily, weekly, monthly, annually, etc.
- **Standard / Target**—Desired Performance Objective, a well-defined Level of Performance
- **Rationale**—Explanation / Justification regarding the feasibility in a course of action, ability to achieve desired outcomes, etc. determined through objective analysis
- **Key Assumptions**—Justification of process conclusions drawn from previous analysis that sup port a specific hypotheses

Performance Measures

Define each Performance Measure as illustrated below;

Performance Measure Format

Each metric is developed based upon the criteria below

The Quality of Data Management is determined by how data is;

- Defined
- Gathered
- Analyzed
- Presented
- Used

Be organized without lapsing into purposeless routine. Periodically reinspect your motives, values and actions

Performance Measure Definition—Define the Metric based upon the outcome(s) sought, e.g. Student Attendance, Drop-out Rate, etc.

Office of Primary Responsibility—Identify the department or individual responsible for managing the data, e.g. School Office

Calculation Formula—How results are calculated from the various sources of data, e.g. number absent from total number of students represented as a percentage

Data Source(s) - Sources where data is generated and/or maintained

Frequency—the frequency data is calculated over a specific period of time, e.g. Daily, weekly, monthly, annually, etc.

Standard / Target—Desired level of performance, e.g. 90% of students present daily.

Rationale—Relationship to Outcomes to goals sought

Key Assumptions—Justified conclusions drawn from previous analysis that support a specific hypotheses

Presentation Format—Appropriate charts / graphs or narrative representations of data

KEY TERMS AND CONCEPTS

ACTION PLAN - Specific steps to implement a solution or the actions needed to make continuous progress toward a solution.
AFFINITY DIAGRAM - A tool that gathers large amounts of language data, ideas, opinions, issues, etc) organizing it into groupings of natural relationships.
AGENDA - List of topics to be addressed during a business meeting
ANALYSIS - The process of reducing something down into individual parts so the whole can be better understood
ASSIGNABLE CAUSE - A source of variation in a process that can be identified and eliminate.
BALDRIGE AWARD - The Malcolm Baldrige National Quality Award is an annual award that recognizes US companies that excel in Quality management and achievement.
BASELINE MEASUREMENT - A beginning point to determine how a process performs prior to any improvement effort.
BENCHMARKING - Determining the performance capability of the "Best Practice" to establish a baseline competency for which to exceed
BRAINSTORMING - An idea-generating technique using group interaction to produce ideas, solution, actions, etc.
CASCADING - Continuous flow of the Quality message down to the next level of supervision until it reaches al workers
CAUSE - The established reason for the existance of a defect or problem.
CAUSE-AND-EFFECT DIAGRAM - A diagram that illustrates the relationship between a given outcome and all factors of influence. Factors most often include; Manpower, Machines, Methods or Materials.
CHARTER - A formal commitment by management stating the scope of authority for an empowered person / group
COMPETENCIES - Individual skills or qualifications for a desired purpose learned through training, individual development or natural abilities.
CONTINUOUS PROCESS IMPROVEMENT - The belief that Quality Management and improvement is a continuous activity to improve efficiency.
CONFORMANCE - Meeting or exceeding requirements or expectations
CONSENSUS - A state where everyone in the group supports an action or decision, even if some of them don't fully agree.
CONTINUOUS PROCESS IMPROVEMENT - The idea that Quality Management and improvement is a continuous activity to ensure improved efficiency.
CROSS FUNCTIONAL - Individuals from different organizational units or functions formed as a team to solve problems, plan and develop solutions.
CULTURAL CHANGE - A major shift in attitudes, norms, sentiments, beliefs, values operating principles and behaviors of an organization
CUSTOMER - Anyone for whom an organization or individual provides goods of services. Can be internal or external.
DATA - Information or a set of facts in descriptive form. Two basic types of data, measured (variable) and counted (attribute or enumerative data).
EMPOWERMENT - Act of placing accountability, authority and responsibility for processes and services at the lowest level.
FEEDBACK - Communication from the (customer) back to (supplier)
FISHBONE DIAGRAM - A diagram that visually illustrates the relationship between an outcome and all factors of influence.
FLOW CHART - A structured representation of all major steps in a process.
FORCE FIELD ANALYSIS - A technique that helps identify relationships of sig ificant

New terms for management in the next millennium

KEY TERMS AND CONCEPTS

The Quality Journey requires an accurate map and a good pair of walking shoes

GANTT CHART - A chart that makes a direct association of tasks to time and the interrelationship of varying tasks.
GROUP DYNAMICS - An on-going process involving the interaction of individuals within a team to achieve a desired objective.
HAWTHORNE EFFECT - The belief that every change (initially, at least) produces an increase in productivity.
HISTOGRAM - A chart that takes measurement data and reveals the amount of variation within any process
INDICATORS - Measures of the degree and /or frequency of conformance to valid requirements.
INPUT - Products or services obtained from others (suppliers) in order to perform primary job tasks.
KAIZEN - In the workplace, means continual incremental improvement involving everyone - managers and workers alike.
MEASUREMENT - Quantitatively comparing results to requirements to arrive at a quantitative estimate of performance.
METRIC - A measurement, taken over time that communicates vital informationabout a process, driving appropriate management action. A metric package consists of an operational definition, measurement and an efficient presentation format.
OBJECTIVE - The "how" and "when" for achieving a goal including measurable end results to be accomplished within specific time limits.
OUTPUTS - Products, materials, services or information provided to a customer.
PARADIGM - Rules, perceptions and knowledge that defines boundaries.
PARETO CHART - A statistical method of measurement to identify the most significant problems through different measurement scales.
PERFORMANCE STANDARD - No deviation to meet agreed upon operational requirements
PROCESS - A set of interrelated work activities intended to consistently produce a specific outcome.
PROCESS ACTION TEAM - A group, knowledgeable of a specific process, chartered to analyze and improve the process.
PROCESS IMPROVEMENT - Specific effort or an engendered environment that allows people to work together to continuously improve a process.
PROCESS OWNER - The person responsible to carry-out a process in the performance of their duties.
QUALITY - Consistently meeting or exceeding customer expectation.
REQUIREMENTS - Performance standards directly associated with specific and measurable customer needs.
ROOT CAUSE - Dominate reason for not meeting performance standards within the context of a process.
STATISTICAL PROCESS CONTROL - Statistical methods to monitor variations in a process over tie.
VALUE ADDED - Identifying what adds worth or impacts a process.