

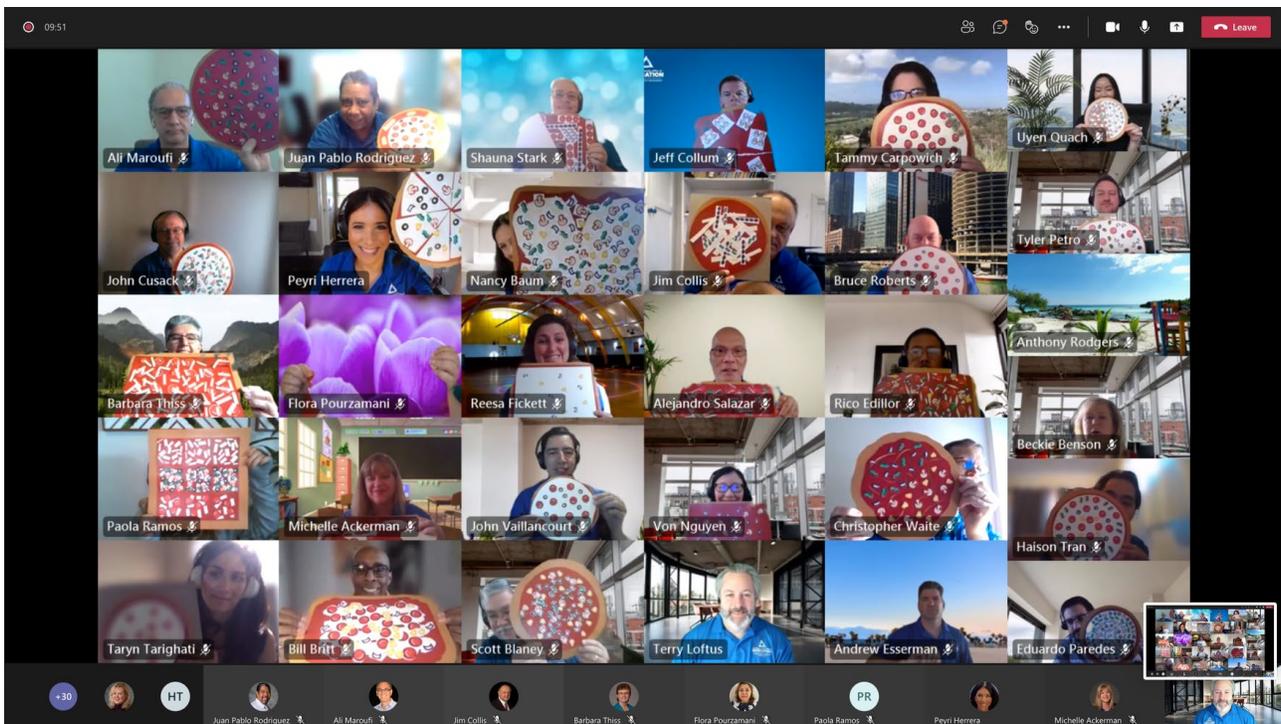
FINAL REPORT

ITS Managers Training Program

Prepared by P.Herrera on 10/14/21

Overview

- **Timeframe:** March-October 2021
- **Audience:** For 35 ITS managers
- **Goals:** To educate and build upon our skills as ITS managers in the areas of management skills and project management skills; to unify our ITS managers (team building)



Schedule

Unit	Date (Fridays)	Module
1. Management Skills	March 12 (9:00-12:00)	Communicate Effectively
	April 9 (9:00-12:00)	Performance Management
	May 7 (9:00-12:00)	Coaching and Feedback
	May 21 (10:30-12:00)	End of Trimester 1 Reflection
2. Project Management	June 11 (8:30-12:00)	PM #1: Plan Your Project
	July 9 (8:30-12:00)	PM #2: Plan Your Project / Execute Your Project
	August 13 (8:30-12:00)	PM #3: Execute Your Project / Close Your Project
	September 10 (8:30-12:00)	PM #4: Close Your Project
	September 24 (9:30-12:00)	End of Trimester 2 Reflection
Celebration	October 14	End of Program Reflection & Celebration

Learning Objectives

Unit 1: Management Skills

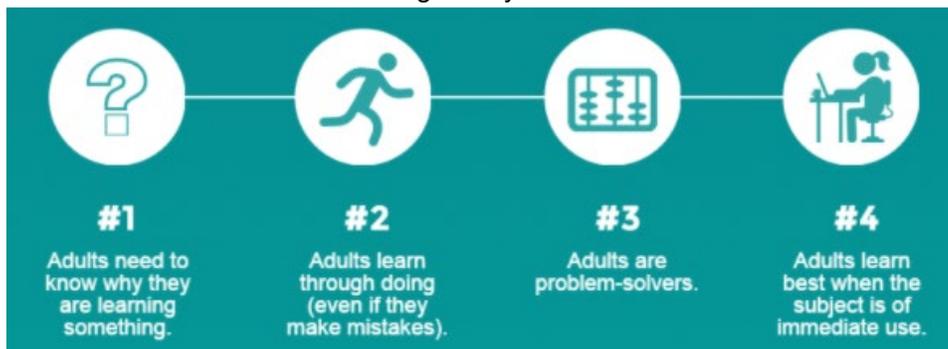
<i>Module</i>	<i>Learning Objectives</i>
<p>Module 1: Communicate Effectively</p> <p>Together we will become better communicators across a variety of personal styles and work contexts</p>	<ol style="list-style-type: none"> 1. Reaffirm why effective communication matters 2. Work with people with different communication styles 3. Communicate clearly and effectively within a team 4. Make meetings more effective
<p>Module 2: Performance Management</p> <p>Together we will become proficient in setting, tracking, and communicating performance management goals</p>	<ol style="list-style-type: none"> 1. Understand the role of managers and employees in the performance management process 2. Learn to set SMART, business-aligned goals for your team 3. Learn to help employees set useful individual goals 4. Learn to set meaningful, holistic metrics to track goal progression 5. Understand the relationship between goals, metrics, and feedback
<p>Module 3: Coaching and Feedback</p> <p>Together we will begin to develop a coaching mindset and understand how to use coaching and feedback effectively to help our staff achieve their goals</p>	<ol style="list-style-type: none"> 1. Understand the difference between coaching and feedback, and when to apply each one 2. Learn the importance of a coaching mindset 3. Learn effective coaching via the 4 A's framework 4. Understand the actions that make up feedback and the factors that make it successful 5. Learn to deal with resistance to feedback
<p>End of Unit 1 Reflection</p> <p>Reflect on all three modules</p>	<p>ITS Managers will have the opportunity to:</p> <ol style="list-style-type: none"> 1. Meet and reflect with their department <ul style="list-style-type: none"> • Helps with alignment – similar projects, work, staff, customers • Sr./Exec Director can hear all their Managers' feedback, questions, needs, etc. 2. Reflect individually by completing the survey first, then enhance their reflection by participating in a group discussion <ul style="list-style-type: none"> • Ways we have applied what we've learned • What we're doing well and where we can improve • What are our next steps 3. Collaborate on a shared document (PowerPoint template with 3 blank slides) 4. Share with other departments and hear from other departments 5. Hear from Terry 6. Hear what to expect for the next unit, Project Management

Unit 2: Project Management

<i>Module</i>	<i>Learning Objectives</i>
<p>Module 1: Plan Your Project</p> <p>Together we will learn the key activities of a project's Planning Phase so we have a consistent approach in how we start our projects</p>	<ol style="list-style-type: none"> 1. Recognize the benefits of project management 2. Understand the phases and key activities of project management 3. Write a Project Charter 4. Take immediate next steps after the Project Charter is authorized 5. Plan and conduct a Kickoff Meeting
<p>Module 2: Execute Your Project</p> <p>Together we will learn the key activities of a project's Execution Phase with an emphasis on communication and keeping our projects on track</p>	<ol style="list-style-type: none"> 1. Monitor progress and conduct status meetings 2. Write a Status Report 3. Communicate to your stakeholders 4. Know to take action when things don't go as planned
<p>Module 3: Close Your Project</p> <p>Together we will learn the key activities of a project's Closure Phase so we have a consistent approach in how we close our projects</p>	<ol style="list-style-type: none"> 1. Use a Project Closeout Checklist 2. Conduct a Lessons Learned meeting 3. Incorporate survey best practices 4. Create a final presentation or report 5. Plan and conduct a Celebration
<p>End of Unit 2 Reflection</p> <p>Reflect on all three modules</p>	<p>ITS Managers will have the opportunity to:</p> <ol style="list-style-type: none"> 1. Meet and reflect with their department <ul style="list-style-type: none"> • Helps with alignment – similar projects, work, staff, customers • Sr./Exec Director can hear all their Managers' feedback, questions, needs, etc. 2. Reflect individually by completing the survey first, then enhance their reflection by participating in a group discussion <ul style="list-style-type: none"> • Our takeaways from the training • Where we're at (Readiness) • Our department's PM goals • Our long term plan 3. Collaborate on a shared document (PowerPoint template with 4 blank slides) 4. Share with other departments and hear from other departments 5. Hear from Terry

Program Details

- **Content:**
 - Unit 1: Management Skills content was adapted from Info-Tech resources, with additional content created by the SDCOE EPMO (3 modules)
 - Unit 2: Project Management content was created by the SDCOE EPMO (3 modules)
 - Each module was introduced at a monthly meeting conducted in Microsoft Teams, as the majority of staff were working from home
 - For both units, the end-of-trimester meetings allowed ITS Managers to reflect and to reinforce concepts (to help create new habits)
- **Handouts (printed spiral-bound book, 1 per unit):** We created handouts that staff could use to jot notes and answer prompts during the sessions. Handouts were packaged as a spiral-bound book and mailed home in advance. They were also available electronically (PDF).
- **Considerations when creating this program:**
 - Interactive
 - Activity and discussion based
 - Opportunities to work with other ITS managers (cross-department and same department)
 - Opportunities to practice and reflect
 - Addresses Knowles' adult learning theory



- **Meeting Norms:**
 - Be present
 - Listen actively
 - Ask questions
 - Honor start and end times
 - Let's have fun!
 - Please keep your camera on and mute/unmute yourself when appropriate. Use the Raise Hand feature for comments and questions.
- **Presenters/Facilitators:**
 - Peyri Herrera, Sr. Director, Enterprise Project Management Office (EPMO) coordinated the meetings overall
 - All Managers played a part by executing a portion of a training (present content on a slide, facilitate a breakout room, moderate the chat).
 - Monday.com was used to manage who's doing what each month

- **Senior Leadership:** After each monthly meeting, Senior Leadership helped foster conversations and discussions to help managers put what they learned into practice
- **Microsoft Teams:** We created a private channel called “ITS Managers” within Team ITS to store the slides, handouts, and recorded sessions for each module
- **Missed meetings:** Managers were expected to make up a missed module by watching the recording and/or reading/reviewing the materials

Outcomes

Unit 1: Management Skills

The end of unit survey provided ITS Managers the opportunity to reflect on the ITS Managers Training for Management Skills, as well as share feedback about the design of this program.

- **SURVEY TIMEFRAME:** May 7-14, 2022
- **# OF RESPONDENTS:** 33 out of 34

Q3. On a scale of 1-4, how satisfied are you with the Trimester 1 ITS Manager Trainings?

- 1 - Extremely Dissatisfied (LOWEST)
- 2 - Dissatisfied
- 3 - Satisfied
- 4 - Extremely Satisfied (HIGHEST)

The top table shows counts. The 'Total' row = All ITS.

The bottom grid shows the same data, displayed as percentages.

Conditional formatting has been applied - green cells indicate a higher value.

Q3 Counts

Department	1 - Extremely Dissatisfied	2 - Dissatisfied	3 - Satisfied	4 - Extremely Satisfied	Total
EA - Enterprise Applications	0	0	9	5	14
EPMO - Enterprise Project Management Office	0	0		3	3
IO - Infrastructure & Operations	0	0	2	2	4
MCS - Media and Creative Services	0	0		3	3
SS - Services & Solutions	0	0	1	8	9
Total	0	0	12	21	33

Q3 Percentages

Department	1 - Extremely Dissatisfied	2 - Dissatisfied	3 - Satisfied	4 - Extremely Satisfied	Total
EA - Enterprise Applications	0%	0%	64%	36%	100%
EPMO - Enterprise Project Management Office	0%	0%	0%	100%	100%
IO - Infrastructure & Operations	0%	0%	50%	50%	100%
MCS - Media and Creative Services	0%	0%	0%	100%	100%
SS - Services & Solutions	0%	0%	11%	89%	100%
Total	0%	0%	36%	64%	100%

Table 1: 100% of the ITS Managers were satisfied with the first 3 months of the program, with 64% 'Extremely Satisfied'

Q6. Which specific skills or techniques have you started to apply as a result of Module 1: Communicate Effectively?

0 - I haven't started applying this yet
1 - I have started to apply this a LITTLE BIT
2 - I have been applying this A LOT
N/A

Conditional formatting has been applied - green cells indicate a higher value.
Values that approach 2.0 mean greater application of the skill/technique.

Q6 Averages

Department Averages	A. Understanding communication styles	B. Tailoring communication methods to activities	C. Using the 3 I's (Inform employees of the whys, interact with employees, involve employees)	D. Setting clear meeting goals and agenda for more effective meetings	E. Using collaborative activities to increase meeting participation	F. Following best practices for virtual meetings
EA - Enterprise Applications	1.6	1.3	1.6	1.4	1.2	1.6
EPMO - Enterprise Project Management Office	1.7	1.7	1.7	1.7	2.0	2.0
IO - Infrastructure & Operations	1.0	1.5	1.0	1.3	1.0	2.0
MCS - Media and Creative Services	1.3	1.0	2.0	1.3	1.0	2.0
SS - Services & Solutions	1.2	1.1	1.1	1.4	1.2	1.4
All ITS (Average)	1.4	1.3	1.4	1.4	1.2	1.7

Table 2: For Module 1, ITS Managers began following best practices for virtual meetings, understanding communication styles, using the 3 I's, and setting clear meeting goals

Q7. Which specific skills or techniques have you started to apply as a result of Module 2: Performance Management?

0 - I haven't started applying this yet
1 - I have started to apply this a LITTLE BIT
2 - I have been applying this A LOT
N/A

Conditional formatting has been applied - green cells indicate a higher value.
Values that approach 2.0 mean greater application of the skill/technique.

Q7 Averages

Department Averages	A. Aligning my work and/or my team's work with the Board Goals and ITS Goals	B. Writing SMART Goals	C. Partnering with my employees to help them set goals	D. Setting and tracking metrics (quantitative, qualitative, behavioral)	E. Creating a culture of continuous growth and learning
EA - Enterprise Applications	1.5	1.1	1.3	0.8	1.5
EPMO - Enterprise Project Management Office	2.0	1.3	1.0	1.0	1.7
IO - Infrastructure & Operations	1.8	0.8	1.5	0.8	1.8
MCS - Media and Creative Services	1.3	0.7	0.7	0.7	1.7
SS - Services & Solutions	1.3	0.6	0.5	0.5	1.1
All ITS (Average)	1.5	0.9	1.0	0.7	1.5

Table 3: For Module 2, ITS Managers began aligning work with goals, and creating a culture of continuous growth and learning

Q8. Which specific skills or techniques do you intend to apply as a result of Module 3: Coaching and Feedback?

I intend to apply this in the next 30 days
I intend to apply this in the next 60 days
I intend to apply this in the next 90 days
N/A

Conditional formatting has been applied - green cells indicate a lower value.
Lower values indicate what ITS Managers intend to apply sooner. Example: We plan to apply Item B sooner than the others (within 43 days on average).

Q8 Averages

	A. Developing a coaching mindset	B. Creating an environment of trust (psychological safety)	C. Using the 4 A's (Active Listening, Asking, Action Planning, Adapting)	D. Leading through influence via coaching (to influence development)	E. Leading through influence via feedback (to influence behavior)
Department Averages					
EA - Enterprise Applications	49	43	45	48	53
EPMO - Enterprise Project Management Office	30	30	50	50	40
IO - Infrastructure & Operations	45	38	45	45	45
MCS - Media and Creative Services	50	50	60	60	60
SS - Services & Solutions	49	49	51	53	56
All ITS (Average # of Days)	47	43	48	50	52

Table 4: For Module 3, ITS Managers indicated they planned to create an environment of trust (average 43 days), developing a coaching mindset (47 days), using the 4 A's (48 days)

Unit 2: Project Management

The end of unit survey provided ITS Managers the opportunity to reflect on the ITS Managers Training for Project Management, as well as share feedback about the design of this program.

- **SURVEY TIMEFRAME:** September 22-30, 2021
- **# OF RESPONDENTS:** 35 out of 35

Q4. To what extent did the training impact your level of confidence about leading projects?

- ↓ Lowered my confidence significantly
- ↓ Lowered my confidence somewhat
- No change in my confidence
- ↑ Raised my confidence somewhat
- ↑ Raised my confidence significantly

RESULTS: 77% responded that the training raised their confidence, 23% no change. The training did not make anyone less confident.

The top table shows counts. The 'Total' row = All ITS.
The bottom grid shows the same data, displayed as percentages.
Conditional formatting has been applied - green cells indicate a higher value.

Table 1: Counts

Q4	Selection	Lowered my confidence	Lowered my confidence	No change in my	Raised my	Raised my	
Department	Lowered my confidence significantly	confidence somewhat	confidence	confidence	confidence somewhat	confidence significantly	Total
EA - Enterprise Applications	0	0	4	5	6		15
EPMO - Enterprise Project Management Office	0	0	1	0	2		3
IO - Infrastructure & Operations	0	0	1	2	2		5
MCS - Media and Creative Services	0	0	1	1	2		4
SS - Services & Solutions	0	0	1	3	4		8
Total	0	0	8	11	16		35

Table 2: Percentages

Q4	Selection	Lowered my confidence	Lowered my confidence	No change in my	Raised my	Raised my	
Department	Lowered my confidence significantly	confidence somewhat	confidence	confidence	confidence somewhat	confidence significantly	Total
EA - Enterprise Applications	0%	0%	27%	33%	40%		100%
EPMO - Enterprise Project Management Office	0%	0%	33%	0%	67%		100%
IO - Infrastructure & Operations	0%	0%	20%	40%	40%		100%
MCS - Media and Creative Services	0%	0%	25%	25%	50%		100%
SS - Services & Solutions	0%	0%	13%	38%	50%		100%
Total	0%	0%	23%	31%	46%		100%

Table 5: 77% of ITS Managers responded that the Project Management unit raised their confidence

Q6. How ready are you to implement/lead the following activities in your future projects?

- 0-Not Ready (I need more information)
- 1-Developing Readiness (I am still getting started)
- 2-Approaching Readiness (I'm just about there)
- 3-Ready (I haven't implemented yet but I'm ready)
- 4-Implementing (I've already started, or have been, implementing)

RESULTS: Total row averages are all 3.0 or higher, which indicates readiness for all activities. Closure might be an area of opportunity.

The table shows the department averages for each activity. EPMO values were not included. The 'Total' row = All ITS.
Conditional formatting has been applied - green cells indicate a higher value
A 3.0 indicates readiness; values that approach 4.0 mean greater application of the skill/activity - NOTE: No one selected 0-Not Ready

Table: Averages for Each PM Activity After Completing Training (3.0 = Ready)

	Plan		Execute				Close			Tools	
Department	Average of 1. Project Charter	Average of 2. Kickoff Meeting	Average of 3. Monitoring/Tracking in Monday.com	Average of 4. Status Meetings	Average of 5. Status Reports	Average of 6. Stakeholder Engagement	Average of 7. Lessons Learned	Average of 8. Survey	Average of 9. Final Report/Presentation	Average of 10. Celebration	Average of 11. Using the Toolkit
EA - Enterprise Applications	3.2	3.3	3.2	3.3	3.1	3.0	3.2	3.1	2.9	3.1	3.1
IO - Infrastructure & Operations	3.0	3.2	3.6	3.4	2.8	2.8	2.6	3.0	2.8	2.4	3.2
MCS - Media and Creative Services	3.0	3.3	3.8	3.5	3.5	3.3	3.8	2.8	2.8	3.0	3.8
SS - Services & Solutions	3.4	3.4	3.6	3.6	3.6	3.8	3.6	3.5	3.4	3.4	3.4
Total	3.2	3.3	3.4	3.4	3.3	3.2	3.3	3.1	3.0	3.0	3.3

Table 6: ITS Managers feel ready for all Project Management activities