

Facilitator Guide

Developing Effective Learning Leaders

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## Overview of Developing Effective Learning Leaders

*Developing Effective Learning Leaders* is an 8-week blended learning course for new leaders joining Concentra's Learning team. The goal of the course is to prepare new leaders to effectively lead their team within the first eight weeks of joining the learning organization. This course will contain a comprehensive learning roadmap. The roadmap will include various components of Concentra's culture, strategy, products, and services, in addition to leadership elements that will prepare them to create a successful 2-year strategy for their learning discipline.

The course is an online leader-led course accessed through the Canvas platform. During each week, there will be activities designed where the learner will meet with various departments, leaders, and colleagues and set-up with a formal learning plan for each interaction. There will be activities such as blogging, discussion questions, reading and reflecting on articles, company culture lessons, leadership lessons, and direct interaction with people who know and understand Concentra's culture, products, and services. The activities will relate to the course content from the discussions, strategic meetings, center visits, sales ride-alongs, and readings. They will also be developing strategic relationships within their own team while creating a 2-year strategy plan they will need to present to leadership at the end of the 8-weeks. The learner will be building parts of the strategy presentation throughout each week of the course. The final presentation on their 2-year strategy will have an overall scorecard the instructor will use to evaluate the learner. The leader will use the scorecard to identify areas of opportunity and strengths, which will carry over into the learner's development plan. The course will have weekly objectives that correspond to the course objectives. Each week the learner will need to complete a scorecard that is aligned to the learning objectives and activities for the week. This scorecard will help the instructor recognize and track the learner's progression. There will also be a Level 1 (reaction) and Level 3 (behavior) evaluation to gain feedback on the course and how the learner feels they are tracking on the objectives and activities.

### Audience Background

The audience for Developing Effective Learning Leaders is for any new full-time learning team leader (manager and director level) at Concentra. The leaders could be promoted internally or join the team from outside the organization. They will possess expertise in their specific learning discipline and have leadership experience prior to starting this role.

## Learning Goals and Objectives

The overall Learning Goals and Objectives for this course are:

- G.1. Create a 2-year strategy for the leaders' learning discipline
  - O.1.1 Discuss Concentra's strategy (cognitive)
  - O.1.2 Recognize Concentra's services and products (cognitive)
  - O.1.3 Explain Concentra's support functions (cognitive)
  - O.1.4 Summarize the goals of the learning team – mission, vision, learning methodology approach (cognitive)
  - O.1.5 Develop a deeper understanding of the learning teams people, processes, and purpose (affective)
  - O.1.6 Discover the learning team clients' perceptions via constructive feedback (affective)
  - O.1.7 Recognize leadership best practices and identify gaps (cognitive)
  - O.1.8 Create the team's learning strategy (cognitive)
  - O.1.9 Demonstrate leadership and knowledge of the company, culture, and team strategy via a formal presentation (psychomotor)
- G.2. Develop relationships within the organization to build confidence of the learning team enterprise-wide, while recognizing leadership and culture opportunities in the organization.
  - O.2.1 Identify Concentra's Orange Book values (cognitive)
  - O.2.2 Develop relationships with Concentra leaders to build credibility (affective)
  - O.2.3 Recognize Orange Book behaviors demonstrated by colleagues in the centers (cognitive)
  - O.2.4 Creates strategic relationships within the learning organization to understand culture (affective)
  - O.2.5 Creates meaningful relationships with direct reports to develop trust (affective)
  - O.2.6 Identify best practices when working with clients and stakeholders to build confidence (cognitive)
  - O.2.7 Summarize Orange Book and leadership behaviors demonstrated by Concentra colleagues through relationship building (cognitive)



## Course Materials

### Books and Articles

- Kouzes, J. M., & Posner, B. Z. (2012). *The leadership challenge: how to make extraordinary things happen in organizations*. 5th ed. San Francisco, CA: Jossey-Bass.
- Concentra's "Orange Book"
- *Various articles available online via Canvas course*
  - Abdallah, E., Ahluwalia, A. (2013). *The keys to building a high-performance culture*. Gallup Business Journal. Retrieved from: <http://news.gallup.com/businessjournal/166208/keys-building-high-performance-culture.aspx>.
  - Byham, T. and Wellins, R. (2015). *Your first leadership job. How catalyst leaders bring out the best in others*. *Get Abstract*. ISBN: 978-1-118-91195-2
  - Insights Learning and Development. (2016). *Developing your leadership legacy today*. Retrieved from: [https://www.youtube.com/watch?time\\_continue=519&v=tGAsPt8BBLA](https://www.youtube.com/watch?time_continue=519&v=tGAsPt8BBLA)
  - Nawaz, S. (2017, May 30th). *Do you know how each person on your team likes to work?* *Harvard Business Review*. Retrieved by: <https://hbr.org/2017/05/do-you-know-how-each-person-on-your-team-likes-to-work>.
  - Rimmer, T. (2018). *10 things you could create instead of an e-learning course*. *E-Learning Heroes*. Retrieved from: <https://community.articulate.com/articles/10-things-you-could-create-instead-of-an-e-learning-course>.
  - Rimmer, T. (2018). *Empower your SMEs to make better e-learning with these 4 tips*. *E-Learning Heroes*. Retrieved from: <https://community.articulate.com/articles/empower-your-smes-to-create-better-e-learning-with-these-4-tips>.
  - Skyline Group Inc. (2018). *Great strategies require great thinking: The seven steps to effective strategic thinking*. *Skyline G Resources*. Retrieved from: <http://info.skylineg.com/resources>
  - Tieger, H. (2016, October 27<sup>th</sup>). *Creating a learning culture in your organization*. *Clarity*. Retrieved from: <http://clarityconsultants.com/blog/creating-a-learning-culture-in-your-organization/>

### Hardware/Software

- Laptop
- Canvas platform
- Microsoft Office
- Handouts
- Conference room, offices, meeting rooms
- Projector

- Projection screen
- Printer
- Paper
- Wi-Fi
- Intranet/Internet

Other Materials

- Scorecards
- Evaluations
- SKEA
- Canvas
- Strategy Planning Tool

## Modules and Instructor Responsibilities

### *Before the Class*

Be sure to read all the materials provided to be able to discuss the topic outlines. The course activities (outlined below) include asynchronous discussions, readings, articles/videos, and the final project creating a 2-year strategy. Be sure to be well versed in course material, as you will be required to engage with learners in group discussions and provide feedback on all course activities.

As the course instructor, you will need to familiarize yourself with the course outline, lesson plans, discussion posts, and assessments. In addition, you will be required to understand how to edit content, show/hide information, make announcements, and adjust assessment settings.

Confirm learners have the necessary tools for training:

- Verify Onboarding of new employee, if necessary, for learners is complete
- Verify the following are available/have been ordered:
  - Laptop
  - The Leadership Challenge
  - The Orange Book
  - VPN/Login credentials
- Schedule weekly debrief meetings with each new learner
  - Book conference room
  - Arrange for projector/screen, if not available in secured room
- Schedule meetings with new learner and CIO, COO, Chief Medical Officer, SVP Therapy, SVP HR, Chief Marketing & Sales Officer as available in Week 1.
- Schedule visits with new learner in Concentra Centers in Week 2.
- Schedule sales ride-along with new learner and Account Executive in Week 2.
- Schedule meetings with new learner and AST, CBO and Referrals leaders in Week 3.
- Schedule meetings with new learner and learning team in Week 4.
- Schedule meetings with new learner and their team customers in Week 6.

## Learning Modules

### Course Overview

- Course Syllabus
- Instructor Bio and Communication Info
- Introduction to Course Components and Technologies
- Skill and Technical Requirements

### Instructor Role and Responsibilities:

#### Course Syllabus

- The course syllabus should be provided to the instructor before the beginning of the course. The course syllabus will be used to provide learners with the course schedule, course outcomes, textbook requirements, explanations of assignments and assessments, assessment scale, instructor contact information, communication and feedback plan.

#### Instructor Bio and Communication Info

- This section will be utilized for the instructors to introduce themselves to their learners.
- Define the best form of communications between you and the learners
  - Q&A forum
  - Canvas
  - Email
  - Phone call
- Define your response time.

#### Introduction to Course Components and Technologies

- This section should be used to introduce the learner to content and material with which they will be engaging.
- Define how they should navigate the course.
- Inform the learners of the Canvas tools and components
  - Home: This is the course landing page. Here you will find key information to help you get started.
  - Syllabus: The Course Syllabus and schedule of activities are available here.
  - Modules: This contains the structure of the course and organizes the course activities and readings to be completed each week.
  - Assignments: Contains a list of all assignments due throughout the course.
  - Discussions: You will communicate with your instructor and colleagues frequently throughout the course by responding to discussion prompts and replying to your colleagues.
- The instructor must ask The Leadership Challenge questions, located in the Appendix
  - [The Leadership Challenge Chapter Review Questions](#)
- The instructor must ask the Learning Strategy questions, located in the Appendix
  - [Learning Strategy Questions](#)
- Skill and Technical Requirements

- This section is used to introduce learners to the technical requirements of the course.
- The instructor must inform learners that an Internet connection is necessary to participate in discussions and assignments, access readings, transfer course work, and receive feedback from the instructor.
- Inform learners that they will be required to copy/paste and attach/upload documents for assignment submission
- Concentra standard computer will include all required technology for course

## Week 1 – Understanding Concentra’s Strategy

Objective: *The learner will build key relationships with leaders in Concentra’s organization while learning the company strategy, culture, and leadership development.*

### Course Assignments:

#### Required Reading:

- Orange Book, in its entirety
- The Leadership Challenge, Chapter 1
- Articles/Videos
  - *The Keys to Building a High-Performance Culture*
  - *Your First Leadership Job. How catalyst leaders bring out the best in others.*
  - *Developing your Leadership legacy today.*
  - *Creating a learning culture in your organization.*

#### Activities

- Review SKEA Learning Leader Roles
- Build Key Relationships
- Learning Strategy
- Debrief with Leader

#### Discussion 1

- The Leadership Challenge weekly questions

#### Blog 1 – Culture

- Set up Blog site
- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming assignments, and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 1: When Leaders are at Their Best
  - The Orange Book

- Articles
  - *The Keys to Building a High-Performance Culture*
  - *Your First Leadership Job. How catalyst leaders bring out the best in others.*
  - *Developing your Leadership legacy today.*
  - *Creating a learning culture in your organization.*

#### Activities

- Review Learning Strategy Week 1 assignment.
  - Reflection

This week was focused on understanding Concentra's strategy. By meeting with various leaders within the organization and reviewing your role's SKEA, take a few minutes to reflect on the following areas:

- What is the leader's awareness, perception or behavior towards learning in general, our department, and how they promote a learning culture with their leaders and teams?
- What are their department's goals and strategies? How do they align learning to those strategies?
- Relationship Strategy

Identify the role of each leader relationship as it pertains to the Learning Department:

- Advocate
- Advisor
- Adversary
- Neutral
- Based on their role, build a strategy to leverage, grow, or manage this relationship
- The Leadership Challenge questions.
  - p. 4 How can we show vulnerability to our team?
  - p. 5 Do you feel that you are doing something big that really matters? How do you communicate that to your team?
  - p. 13 Do you feel that you have a strategy in place that helps you move beyond the ordinary to the extraordinary? Do you think others – team, customers, are seeing that?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time as available with new learner and CIO, COO, Chief Medical Officer, SVP Therapy, SVP HR, Chief Marketing & Sales Officer.
- Discussion 1
  - Facilitate the discussion.
  - Assess the discussion initial post and replies according to the assessment guidelines.
  - Prepare for weekly debrief meeting

- Confirm meeting is scheduled with learner
- Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries
- Blog 1
  - Review the weekly Orange Book/Culture blog post and comment
- Final Presentation
  - Introduce the Final presentation and plans for presentation at Week 8
- Scorecard
  - Complete weekly scorecard on learner's performance



## Week 2 – Concentra’s Services, Products, Culture

Objective: *The learner will visit Concentra’s centers and attend a field ride-along with sales. They will observe Orange book behavior while gaining a basic understanding of center colleagues roles and Concentra’s services and products.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 2 – Credibility is the Foundation of Leadership

#### Activities:

- Learning Strategy
- Center Visits
- Services and Products
- Sales-Ride Alongs
- Debrief with Leader

#### Discussion 2

- The Leadership Challenge weekly questions

#### Blog 2 – Culture:

- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming assignments, and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 2: Credibility is the Foundation of Leadership

##### Activities

- Review Learning Strategy Week 2 assignment.
- Reflection

This week was focused on understanding Concentra's center models, our services and products, our patients and our customers. Take a few minutes to reflect on the following areas:

- How do our colleagues learn? How do they want to learn?
- What do they need to know to be successful when working with either our patients or our customers?
- What is the role of the leader? How are they coached / developed in their role?
- What role does the environment play in their learning?
- How can our colleagues make the patient experience better?
- Building a Learning Team Strategy

Identify the following areas as it pertains to learning solutions provided to the field:

- Current state of how we provide learning
- Current state of how leaders reinforce learning opportunities
- The role of technology in learning
- Strengths
- Opportunities

Based on their role, build a strategy on how your team will leverage our current state to achieve a desired future state

- Ask questions to the learner about *The Leadership Challenge*.
  - p. 15 The book mentioned that many think leaders have to come with a vision, when the reality is that people want to be involved in the process. Our team went further on that thought when we had the team co-create the mission and vision statement themselves. From your perspective, what impact has that had/could that have on our team and individuals?
  - p. 18 What are way that you try to encourage the heart?
  - p. 29 Before you learned what CAL was, how would you have answered the survey question, '*what do you look for in a person you would be willing to follow?*' What are ways that you try to encourage the heart?
  - p. 38 Did you find it interesting that *forward looking* has declined as a leadership trait?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time.

#### Discussion 2

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner

- Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 2

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner's performance

### **Week 3 - Concentra's Support Functions**

Objective: *The learner will meet with Concentra's center support functions to gain an overall understanding of the Concentra ecosystem.*

#### Course Assignments:

##### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 3 & 4 - Practice 1: Model the Way
  - Chapter 3 – Clarify Values
  - Chapter 4 – Set the Example

##### Activities:

- Learning Strategy
- Meet with AST, CBO and Referral Leaders
- Debrief with Leader

##### Discussion 3:

- The Leadership Challenge weekly questions

##### Blog 3 – Culture:

- The Orange Book focus question

##### Instructor Role and Responsibilities:

###### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming [assignments](#), and projects.

## Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 3 – Clarify Values
  - Chapter 4 – Set the Example

## • Activities

- Review Learning Strategy Week 3 assignment.
  - Reflection

This week was focused on learning about Concentra’s center support functions and how they align and support our overall ecosystem. Take a few minutes to reflect on the following areas as it pertains to AST, Referrals, and the CBO:

- What is their purpose and overall goals?
- How do they support the team and align with their strategies and KPIs?
- What tools and resources do they use to troubleshoot?
- What metrics do they track?
- How do they grow and develop their new and existing colleagues?
- Building a Learning Team Strategy

Identify the following areas as it pertains to learning solutions provided to the support teams:

- Current state of how we provide learning
- Current state of how leaders reinforce learning opportunities
- The role of technology in learning
- Strengths
- Opportunities

Based on their role, build a strategy on how your team will leverage our current state to achieve a desired future state

- Ask questions to the learner about *The Leadership Challenge*.
  - p. 63 Do you think our team can count on others? Why or why not?
  - p. 63 Do you think the team understands my values or feel we have shared values?
  - p. 65 Do you feel they are involved in process and that we are interested in their perspective?
  - p. 80 Are there words we use, or that I use that are negatively framing how we are influencing our team’s perception of us
  - p. 81 Good example on p. 81 with the sporting goods store – how could we help our team reframe their thinking or their approach to their work? What impact could that have?
  - p. 82 How does the feedback process meet the 2 human needs

- p. 83 Love this graph on page 83 – how do you think you could use this with your team?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time. Schedule meetings with new learner and AST, CBO and Referrals leaders

#### Discussion 3

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner
  - Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 3

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner's performance

## Week 4 - Create Learning Team Relationships

Objective: *The learner will meet with the different disciplines of the learning department to gain an understanding of the team culture, people, processes and purpose.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 5 & 6 - Practice 2: Inspire a Shared Vision
  - Chapter 5 – Envision the Future
  - Chapter 6 – Enlist Others
- Articles
  - *10 things you could create instead of an e-learning course*
  - *Empower your SMEs to make better e-learning with these 4 tips*

#### Activities:

- Learning Strategy
- The Learning Department meetings
- Debrief with Leader

#### Discussion 4:

- The Leadership Challenge weekly questions

#### Blog 4 – Culture:

- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming assignments, and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 5 – Envision the Future
  - Chapter 6 – Enlist Others
- Articles
  - *10 things you could create instead of an e-learning course*

- *Empower your SMEs to make better e-learning with these 4 tips*

#### Activities

- Review Learning Strategy Week 3 assignment
- Reflection

This week was focused on learning about the different disciplines within the Learning department. Take a few minutes to review the Learning Department's Goal and Strategy document and then reflect on the following areas as it pertains to each of those disciplines:

- What do they do?
- Who is their customer and how what have we learned about their customer?
- How do they interact in a meaningful and memorable way with their customer?
- How do they collaborate with other learning team members?
- What tools and resources do they use to collaborate and create solutions?
- How do they bring value:
  - To other team members?
  - To their customer?
  - To the end user?

What evidence, if any, is there that shows that the teams are moving from a “training” team to a “learning & performance” team?

- Building A Learning Solutions Strategy

Continue to build your learning solution strategy from week two by incorporating additional elements, such as:

- Ensuring consistent approach to Prepare, Learn, Apply, Perform
- Understanding their customer, beyond the obvious
- How they use tools and technology that enhance the (internal) customer experience and collaboration
- Ask questions to the learner about *The Leadership Challenge*.
  - p. 101 Be present in the present...what are you seeing as trends – how others are doing things or what they are talking about?
  - p. 107 How can we, as leaders, help our team member see their hopes and dreams incorporated and appreciated into the common purpose?
  - p. 114 What “fog” will our team run into and how can we clear it for them?
  - p. 120 Awakening dreams is sometimes difficult when working with members of your team. Do you think your team has dreams that

could be fulfilled at Concentra? Do you think they've ever asked that question of themselves? Why or why not?

- p. 123 If we ask each team member what makes our department unique, do you think that's an easy or hard question to answer? Why?
- p. 134 Our vision is "To become a learning culture that inspires our colleagues to reach their highest potential," do you think your team wants to "go there someday?"
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time.

#### Discussion 4

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner
  - Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 4

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner's performance



## Week 5 - Create Learning Discipline Relationships

Objective: *The learner will meet with their learning team to gain an understanding of the team culture, people, processes and purpose.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 7 & 8 - Practice 3: Challenge the Process
  - Chapter 7 – Search the Opportunities
  - Chapter 8 – Experiment and Take Risks
- Articles
  - *Do you know how each person on your team likes to work?*

#### Activities:

- Learning Strategy
- Meet the Team 1x1
- Debrief with Leader

#### Discussion 5:

- The Leadership Challenge weekly questions

#### Blog 5 – Culture:

- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming [assignments](#), and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 7 – Search the Opportunities
  - Chapter 8 – Experiment and Take Risks
- The Orange Book
- Articles
  - *Do you know how each person on your team likes to work?*

## Activities

- Review Learning Strategy Week 5 assignment
  - Reflection

This week was focused on learning about your own team within the Learning Department. Take a few minutes to review the Learning Department's Goal and Strategy document and the competencies in your SKEA on Team Building, Developing Others, and Building Trust and Rapport and then reflect on the following areas as it pertains to your team:

- What do they do?
- Who is their customer and what have we learned about their customer?
- How do they interact in a meaningful and memorable way with their customer?
- How do they collaborate with other learning team members?
- What tools and resources do they use to collaborate and create solutions?
- How do they bring value?
  - To other team members?
  - To their customer?
  - To the end user?
- How does your team display Orange Book behaviors with each other and with their customers?
- What evidence, if any, is there that shows that the teams are moving from a "training" team to a "learning & performance" team?
- Building a Learning Team Strategy

Begin to create your team's strategy by incorporating additional elements, such as:

- Current State:
  - Strengths
  - Opportunities
- Future State (there will be four elements of your future state.) This week you will focus on the first three:
  - Development Strategy
  - Team Meeting Strategy
  - Collaboration Strategy
- Ask questions to the learner about *The Leadership Challenge*.
  - p. 148 How are your team members seeing you actively searching for innovative ways to improve?

- p. 148 What challenges does your team face that causes them to change and what leadership traits emerged from that connection between challenge and change?
- p. 151 When was the last time you asked your team, “Why do we do this?”
- p. 158-159 How do you build oversight into your strategy to innovate and challenge?
- p. 162-163 How can we enable our teams to follow processes, yet be intuitive enough to know how to adapt when turbulent times occur?
- p. 175 Do you feel that you have psychological hardiness: Commitment, control, and challenge? Out of the 3, which one do you feel is your strongest / your opportunity to build?
- P. 187 When are there opportunities to have curiosity conversations with your team or our customers?
- p. 190 From your perspective what would a growth mindset look like on your team? When the team reaches a milestone, how can we celebrate and recognize those that had a growth mindset during the project?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time.

#### Discussion 5

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner
  - Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 5

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner’s performance

## Week 6 - Discovery of Client Needs/Perceptions

Objective: *The learner will discover their client's perceptions of the team while creating a strategic partnership.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 9 & 10 - Practice 4: Enable Others to Act
  - Chapter 9 – Foster Collaboration
  - Chapter 10 – Strengthen Others

#### Activities:

- Learning Strategy
- Learning Team Client Meetings
- Debrief with Leader

#### Discussion 6:

- The Leadership Challenge weekly questions

#### Blog 6 – Culture:

- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming assignments, and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 9 – Foster Collaboration
  - Chapter 10 – Strengthen Others
- Articles
  - [Do you know how each person on your team likes to work?](#)

##### Activities

- Review Learning Strategy Week 6 assignment.

- Reflection

This week was focused on learning about your team's customers. How your team creates, builds and leverages these partnerships will influence the results they are able to achieve. Take a few minutes to reflect on the following areas as it pertains to your team's customers:

- Current Relationship
  - Strengths
  - Opportunities
- Current Process
  - What's working/not working within the process?
  - How often do they assess the value of the process with you?
- Where are opportunities for the team to create additional value with them?
  - What skills or tools would be needed to create that additional value?
- Does this customer's focus align or conflict with their executive's strategy (refer to Week One)

- Building a Learning Team Strategy

Continue to build your team's strategy by incorporating additional elements, such as:

- Future State (this is a continuation from Week 5, with the addition of the fourth element):
  - Process Strategy
- Ask questions to the learner about The Leadership Challenge.
  - p. 205 Outside of design stages like Heartfield Huddles, how can we create opportunities where everyone is respected, appreciated and their competence acknowledged?
  - p. 208 Where can you create opportunities or projects that promote joint efforts and support norms of reciprocity?
  - p. 212 How can you build a culture of cooperation, where additive and cumulative contributions are achieved?
  - p. 215 Consider your team today – virtual or present – how can you create opportunities for them to get to know each other firsthand, built trust and collaborate?
  - p. 225 Do you feel that your team feels proud to work for you, our department, and our company? Why or why not? When was the last time you asked them?
  - p. 231 What does this statement mean to you, “the power to choose rests on the willingness to be held accountable?”

- p. 232 How can you ensure that as you instill cooperative environments, that certain team members don't become "social loafers?" Should you step in or allow the others to work through it?
- p. 234 Compare your team to the graph on p. 234, where would they fall and what does that tell you about the actions you need to take as a leader?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time.

#### Discussion 6

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner
  - Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 6

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner's performance

## Week 7 - Create a 2-Year Team Strategy

Objective: *The learner will continue to create their 2-year strategy for the team based on knowledge gained throughout the course.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 11 & 12 - Practice 5: Encourage the Heart
  - Chapter 11 – Recognize Contributions
  - Chapter 12 – Celebrate the Values and Victories
- Article
  - *Great Strategies Require Great Thinking: The Seven Steps to Strategic Thinking*

#### Activities:

- Learning Strategy
- Prepare Strategy Presentation
- Review “Presentation” competent and proficient skills in SKEA
- Debrief with Leader

#### Discussion 7:

- The Leadership Challenge weekly questions

#### Blog 7 – Culture:

- The Orange Book focus question

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming [assignments](#), and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 11 – Recognize Contributions
  - Chapter 12 – Celebrate the Values and Victories
- Articles

- *Great Strategies Require Great Thinking: The Seven Steps to Strategic Thinking*

#### Activities

- Review Learning Strategy Week 7 assignment.
  - Reflection

This week you will begin to formulate your final strategy presentation for next week. The strategies that you create are dependent on the knowledge, skills, and tools that you have as a leader. Take a few minutes to review your questions from the weekly leader discussions on *The Leadership Challenge* and your own SKEA. Reflect on the following areas as it pertains to your team's customers:

- How do I evolve as a Best-In-Class leader for my team?
- What Orange Book Behaviors do I need to build or strengthen to model the way for my team?
- How will I incorporate the Five Examples of an Exemplary Leader every day?
- What personal skills do I need to develop to be the most effective leader?
- What position skills do I need to develop to be the most strategic leader?

#### Becoming a Best-In-Class Learning Leader Strategy

Create your own personal strategy on how you will become a Best-in-Class learning leader by incorporating elements, such as:

- Five Examples of an Exemplary Leader
- Year One Development Plan – this should incorporate opportunities around:
  - Skills
  - Relationships
  - Concentra organizational knowledge
- Ask questions to the learner about *The Leadership Challenge*.
  - p. 252 What expectations do you communicate up front of your team? What do you communicate over time?
  - p. 256 How can we ensure that our teams understand the correlation between goals and recognition?
  - p. 262 One of the ways that we personalize recognition is through the Rewards and Recognition form. How else have you personalized recognition?
  - p. 273 There's so many benefits to social connections on the team. How can we ensure that we're setting up an environment to foster those connections?
  - p. 283 How can we build fun back into our work?



- p. 288 This year, we are working on building our stories in order to tell our story. If you had an opportunity to introduce a member of your team only through a story, what story would you tell?
- Set up weekly meetings with stakeholders, arrange center visits, office visits, and secure meeting time.

#### Discussion 7

- Facilitate the discussion.
- Assess the discussion initial post and replies according to the assessment guidelines.
- Prepare for weekly debrief meeting
  - Confirm meeting is scheduled with learner
  - Confirm room/projector is scheduled
- Conduct weekly debrief meeting
  - Discuss the leadership challenge weekly questions.
  - Discuss/assess questions/answers from weekly readings
  - Discuss/assess activities, including Blog entries

#### Blog 7

- Review the weekly Orange Book/Culture blog post and comment

#### Scorecard

- Complete weekly scorecard on learner's performance

## Week 8 - Present 2-Year Team Strategy

Objective: *The learner will formally present their 2-year strategy for the team based on knowledge gained throughout the course.*

### Course Assignments:

#### Required Reading:

- Orange Book
- The Leadership Challenge, Chapter 13 – Leadership is Everyone’s Business
  - Chapter 13 – Leadership is Everyone’s Business

#### Activities:

- Learning Strategy
- Present 2-year strategy to leadership
- Present 2-year strategy to team
- Debrief with Leader

#### Discussion 7:

- The Leadership Challenge weekly questions

#### Blog 8 – Culture:

- The Orange Book observations summary

#### Instructor Role and Responsibilities:

##### Weekly Overview

- The instructor will need to cover
  - Overview of the topics for that week.
  - [Learning Strategy](#)
  - [Leadership Challenge questions](#)
  - Course-level outcomes that will be assessed this week
    - The Leadership Challenge questions.
    - Culture “The Orange Book” Blog
    - Strategy Lesson
- Provide learners with upcoming assignments, and projects.

##### Readings

- Emphasize to learners that readings and questions need to be completed each week.
- Tell learners they will be reading the *The Leadership Challenge*
  - Chapter 13 – Leadership is Everyone’s Business

##### Activities

- Review Learning Strategy Week 8 assignment.
  - Preparation

This week you will present your Learning Department Strategy. Your leader has provided the presentation template that you will use. Your one-hour presentation will incorporate the following components:

- Title Slide
- Presentation Objective
- Relationship Strategy
- Building Best-in-Class Learning Solutions
- Building a Best-in-Class Team
- Becoming a Best-in-Class Leader
- Performance

During your presentation, your leader and peers will assess your performance on the following criteria:

- Content
- Presentation Skills
- Consulting Skills
- Meeting Facilitation
- Ask questions to the learner about *The Leadership Challenge*.
  - p. 299 What did you think about the percentage of talent people expend when led by a bad leader? Why do you think that is?
  - p. 303 On p. 303, they discuss “deliberate practice.” I’d like to expand that to “deliberate practice done often.” How will you commit to these leadership practices going forward?
  - p. 308 What have you learned through the years about yourself as a leader? What have you learned about yourself through this book?
  - p. 312-313 Why did you get into leadership? Why do you stay in a leadership role?

#### Discussion 8

- Facilitate the discussion.
- Ensure final presentations are on schedule
- Answer questions and pose discussion questions for learner engagement.
- Provide feedback to learners as soon as possible.

#### Blog 8

- Review the weekly Orange Book/Culture blog post and comment

#### Final Presentations

- Facilitate final project presentations
- Ensure final presentations are on schedule
- Answer questions and pose discussion questions for learner engagement
- Provide feedback to learners as soon as possible

#### Scorecard

- Complete weekly scorecard on learner’s performance

## Course Assignments

The course activities encompass reading assignments, discussions, activities, blogs, and a final project.

### Readings

#### Description

- Learners will be required to read the weekly assigned readings
- Readings are a part of learners' participation and enable them to complete the activities and discussions.
- Readings due each week by Wednesday at 11:59pm.

### Activities

#### Description

- Learners will be required to participate in all weekly activities during the week.
- Participation and engagement will be assessed and become part of the learner's overall development plan.
- Due each week by Friday at 12:00 pm.

### Discussions

#### Description

- Learners will be required to respond to weekly discussion questions on The Leadership Challenge.
- Replies are due each week by Friday at 12:00 pm.
- Posts should be constructive and use knowledge gained from resources in or related to this course.
- Discussion will be counted in weekly scorecard.

### Orange Book Blogs

#### Description

- Learners will be required to Blog weekly on The Orange Book behaviors.
- Discussion posts are a part of learners' participation.
- Replies are due each week by Friday at 12:00 pm.
- Posts should be constructive and use knowledge gained from resources in or related to this course.
- Blog will be counted in weekly scorecard.

### Final Project – 2-year team strategy

#### Description

- A final project will be used to assess learners' overall comprehension of course content. Learners will produce their 2-year team strategy.
- During your presentation, your leader and peers will assess your performance on the following criteria:
  - Content

- Presentation Skills
- Consulting Skills
- Meeting Facilitation

### One-hour presentation:

Will incorporate the following components:

- Title Slide
- Presentation Objective
- Relationship Strategy
- Building Best-in-Class Learning Solutions
- Building a Best-in-Class Team
- Becoming a Best-in-Class Leader

### Instructor Role and Responsibilities

- Assess learners final project progress.
- Provide feedback in a timely manner to ensure learners have feedback.
- Set up stakeholder meetings and provide meeting space.

## Course Assessments

At the end of each week, the learners will be assessed on how well they completed each week’s assignment through a scorecard. The scorecard will contain criteria that the learner will have to learn or perform on a weekly basis. They will be scored on criteria of whether or not they completed the assignment, and on a scale of 1-5 on how effective they performed the assignment.

There will also be a formal scorecard in Week 8 around their “presentation” which will be a 20% of the overall assessment scorecard.

The learner will also be assessed weekly on timely scorecard completion of all activities. The leader will review the scorecard and make sure it’s completed before the learner can move onto the next week. This will ensure that the client standards and expectations from each learner are being accomplished. For the final project, the learner will be assessed on whether or not they are able to apply their knowledge to create a 2-year strategy framework for their team. They will need to demonstrate what they’ve learned in their final presentation and be assessed by their leader through observation with a formalized checklist of criteria (scorecard). The criteria will be selected on various components that will need to be included in the overall strategy plan.

Performance monitoring involves the instructor checking the progress of the scorecard completion around discussions, readings and activities. The learner will be expected to perform at a 4 or 5 on all tasks which will indicate mastery of the content. Instructor will conduct final learner scorecard evaluations upon them completing their core course material and evaluations. The final scorecard process will be signed off by the client, who is initiating the evaluations of each learner, and their progress through the course curriculum. The leader will use the scorecard to identify areas of opportunity and strengths, which will carry over into the learner’s development plan.

### Assessment Scale

#### Assessment Scale



### Evaluations Description

#### ***Level 1 Evaluation***

Learners will provide feedback on effectiveness of learning course by completing a Level 1 survey. The survey results will be reviewed quarterly for feedback and considered for course improvement. The client will assess all feedback and make updates to the course on a maintenance schedule.

From a scale of 1 to 5, the learner will assess the course under the following criteria:

- Importance: The *importance* of the course to their roles and responsibilities.
- Quality: The *quality* of the instructional design.
- Quantity: The *quantity* of information for the learner to perform their daily job functions
- Impact: The *impact* on providing perfect service.
- Value: The learning contribution to the **value** of the patient and customer experience
- Intent: *The intent* to apply to their daily job

### Level 3 Evaluation

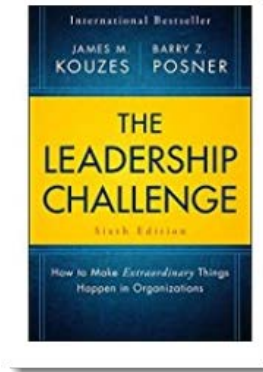
Leaders and Learner will both fill out a Level 3 evaluation. It will deploy at the end of the course to the learner, and their team's customers, learning team leaders, AST leader, CBO leader, senior leadership.

The learner will be assessed through a Level 3 evaluation (behavior) on whether they were able to apply what they've learned. The Level 3 evaluation will be filled out from a combination of both management observation, and stakeholders involved in their learning process. The stakeholders/manager will fill out a formal evaluation on whether the new leader applied their learning, and the learner will fill one out on how well they felt they were able to apply their learning. This survey will reflect questions around how well the learner applied their knowledge of Concentra's products, services, culture and leadership beliefs. The questions will also evaluate the application around knowledge of the learning team's peoples, processes, and purpose. The feedback from this evaluation will assist the instructor/leader on creating the learner's future development plan.

Course maintenance will be done annually based on both Level 1 and 3 results. The scorecard will also be considered and evaluated based on the timing and completion of assignments. Learner evaluation scores and comments before the course changes will be compared to the learner evaluation scores and comments after the course changes are implemented.

## Appendix

### Appendix I - The Leadership Challenge - Review Questions



#### Chapter 1-2

- p. 4 How can we show vulnerability to our team?
- p. 5 Do you feel that you are doing something big that really matters? How do you communicate that to your team?
- p. 13 Do you feel that you have a strategy in place that helps you move beyond the ordinary to the extraordinary? Do you think others – team, customers, are seeing that?
- p. 15 The book mentioned that many think that leaders have to come up with a vision, when the reality is that people want to be involved in the process. Our team went further on that thought when we had the team co-create the mission and vision statement themselves. From your perspective, what impact has that had/could that have on our team and individuals?
- p. 18 What are ways that you try to encourage the heart?
- p. 29 Before you learned what CAL was, how would you have answered the survey question, ‘*what do you look for in a person you would be willing to follow?*’
- p. 38 Did you find it interesting that *forward looking* has declined as a leadership trait?

#### Chapter 3-4

- p. 63 Do you think our team can count on others? Why or why not?
- p. 63 Do you think the team understands my values or feel we have shared values?
- p. 65 Do you feel they are involved in process and that we are interested in their perspective?
- p. 80 Are there words we use, or that I use that are negatively framing how we are influencing our team’s perception of us



- p. 81 Good example on p. 81 with the sporting goods store – how could we help our team reframe their thinking or their approach to their work? What impact could that have?
- p. 82 How does the feedback process meet the 2 human needs?
- p. 83 Love this graph on page 83 – how do you think you could use this with your team?

## Chapter 5-6

- p. 101 Be present in the present...what are you seeing as trends – how others are doing things or what they are talking about?
- p. 107 How can we, as leaders, help our team member see their hopes and dreams incorporated and appreciated into the common purpose?
- p. 114 What “fog” will our team run into and how can we clear it for them?
- p. 120 Awakening dreams is sometimes difficult when working with members of your team. Do you think your team has dreams that could be fulfilled at Concentra? Do you think they’ve ever asked that question of themselves? Why or why not?
- p. 123 If we ask each team member what makes our department unique, do you think that’s an easy or hard question to answer? Why?
- p. 134 Our vision is “To become a learning culture that inspires our colleagues to reach their highest potential,” do you think your team wants to “go there someday?”

## Chapter 7-8

- p. 148 How are your team members seeing you actively searching for innovative ways to improve?
- p. 148 What challenges does your team face that causes them to change and what leadership traits emerged from that connection between challenge and change?
- p. 151 When was the last time you asked your team, “Why do we do this?”
- p. 158-159 How do you build oversight into your strategy to innovate and challenge?
- p. 162-163 How can we enable our teams to follow processes, yet be intuitive enough to know how to adapt when turbulent times occur?
- p. 175 Do you feel that you have psychological hardiness: Commitment, control, and challenge? Out of the 3, which one do you feel is your strongest / your opportunity to build?

- P. 187 When are there opportunities to have curiosity conversations with your team or our customers?
- p. 190 From your perspective what would a growth mindset look like on your team? When the team reaches a milestone, how can we celebrate and recognize those that had a growth mindset during the project?

## Chapter 9-10

- p. 205 Outside of design stages like Heartfield Huddles, how can we create opportunities where everyone is respected, appreciated and their competence acknowledged?
- p. 208 Where can you create opportunities or projects that promote joint efforts and support norms of reciprocity?
- p. 212 How can you build a culture of cooperation, where additive and cumulative contributions are achieved?
- p. 215 Consider your team today – virtual or present – how can you create opportunities for them to get to know each other firsthand, built trust and collaborate?
- p. 225 Do you feel that your team feels proud to work for you, our department, and our company? Why or why not? When was the last time you asked them?
- p. 231 What does this statement mean to you, “the power to choose rests on the willingness to be held accountable?”
- p. 232 How can you ensure that as you instill cooperative environments, that certain team members don’t become “social loafers?” Should you step in or allow the others to work through it?
- p. 234 Compare your team to the graph on p. 234, where would they fall and what does that tell you about the actions you need to take as a leader?

## Chapter 11-12

- p. 252 What expectations do you communicate up front of your team? What do you communicate over time?
- p. 256 How can we ensure that our teams understand the correlation between goals and recognition?
- p. 262 One of the ways that we personalize recognition is through the Rewards and Recognition form. How else have you personalized recognition?
- p. 273 There’s so many benefits to social connections on the team. How can we ensure that we’re setting up an environment to foster those connections?
- p. 283 How can we build fun back into our work?

- p. 288 This year, we are working on building our stories in order to tell our story. If you had an opportunity to introduce a member of your team only through a story, what story would you tell?

### Chapter 13

- p. 299 What did you think about the percentage of talent people expend when led by a bad leader? Why do you think that is?
- p. 303 On p. 303, they discuss “deliberate practice.” I’d like to expand that to “deliberate practice done often.” How will you commit to these leadership practices going forward?
- p. 308 What have you learned through the years about yourself as a leader? What have you learned about yourself through this book?
- p. 312-313 Why did you get into leadership? Why do you stay in a leadership role?

## Appendix II - Learning Strategy

### Reflection

Each week, you will have an opportunity to do a number of activities that will build your awareness of Concentra, your role, your team, and your customers – internally and externally. In Kolb's Model of Learning, reflection is the second stage of the learning cycle, and he puts heavy emphasis on this stage because without reflection, a learner is not able to think about new ideas and ultimately put them into practice.

### Strategy

Your strategy is the ability to take your experiences from that week, leverage the reflection exercise, and then begin to conceptualize your team's strategy. Each week, you will begin to develop your overall strategy for your department, culminating in a Strategy Presentation for your leader and peers. The insight that you gain during conversations, observations, readings, and reflection will help you create opportunities within each of the four segments of your overall Strategy:

- Relationship Strategy
- Building Best-in-Class Learning Solutions
- Building a Best-in Class Learning Team
- Becoming a Best-in-Class Learning Leader

## Week One

### Reflection

This week was focused on understanding Concentra's strategy. By meeting with various leaders within the organization and reviewing your role's SKEA, take a few minutes to reflect on the following areas:

- What is the leader's awareness, perception or behavior towards learning in general, our department, and how they promote a learning culture with their leaders and teams?
- What are their department's goals and strategies? How do they align learning to those strategies?

### Relationship Strategy

Identify the role of each leader relationship as it pertains to the Learning Department:

- Advocate
- Advisor
- Adversary
- Neutral

Based on their role, build a strategy to leverage, grow, or manage this relationship

## Week Two

### Reflection

This week was focused on understanding Concentra's center models, our services and products, our patients and our customers. Take a few minutes to reflect on the following areas:

- How do our colleagues learn? How do they want to learn?
- What do they need to know to be successful when working with either our patients or our customers?
- What is the role of the leader? How are they coached / developed in their role?
- What role does the environment play in their learning?
- How can our colleagues make the patient experience better?

### Building a Learning Team Strategy

Identify the following areas as it pertains to learning solutions provided to the field:

- Current state of how we provide learning
- Current state of how leaders reinforce learning opportunities
- The role of technology in learning
- Strengths
- Opportunities

Based on their role, build a strategy on how your team will leverage our current state to achieve a desired future state

## Week Three

### Reflection

This week was focused on learning about Concentra's center support functions and how they align and support our overall ecosystem. Take a few minutes to reflect on the following areas as it pertains to AST, Referrals, and the CBO:

- What is their purpose and overall goals?
- How do they support the team and align with their strategies and KPIs?
- What tools and resources do they use to troubleshoot?
- What metrics do they track?
- How do they grow and develop their new and existing colleagues?

### Building a Learning Team Strategy

Identify the following areas as it pertains to learning solutions provided to the support teams:

- Current state of how we provide learning
- Current state of how leaders reinforce learning opportunities
- The role of technology in learning
- Strengths
- Opportunities

Based on their role, build a strategy on how your team will leverage our current state to achieve a desired future state

## Week Four

### Reflection

This week was focused on learning about the different disciplines within the Learning department. Take a few minutes to review the Learning Department's Goal and Strategy document and then reflect on the following areas as it pertains to each of those disciplines:

- What do they do?
- Who is their customer and what have we learned about their customer?
- How do they interact in a meaningful and memorable way with their customer?
- How do they collaborate with other learning team members?
- What tools and resources do they use to collaborate and create solutions?
- How do they bring value:
  - To other team members?
  - To their customer?
  - To the end user?
- What evidence, if any, is there that shows that the teams are moving from a "training" team to a "learning & performance" team?

### Building a Learning Team Strategy

Continue to build your learning solution strategy from week two by incorporating additional elements, such as:

- Ensuring consistent approach to Prepare, Learn, Apply, Perform
- Understanding their customer, beyond the obvious
- How they use tools and technology that enhance the (internal) customer experience and collaboration

## Week Five

### Reflection

This week was focused on learning about your own team within the Learning Department. Take a few minutes to review the Learning Department's Goal and Strategy document and the competencies in your SKEA on Team Building, Developing Others, and Building Trust and Rapport and then reflect on the following areas as it pertains to your team:

- What do they do?
- Who is their customer and what have we learned about their customer?
- How do they interact in a meaningful and memorable way with their customer?
- How do they collaborate with other learning team members?
- What tools and resources do they use to collaborate and create solutions?

- How do they bring value:
  - To other team members?
  - To their customer?
  - To the end user?
- How does your team display Orange Book behaviors with each other and with their customers?
- What evidence, if any, is there that shows that the teams are moving from a “training” team to a “learning & performance” team?

### Building a Learning Team Strategy

Begin to create your team’s strategy by incorporating additional elements, such as:

- Current State:
  - Strengths
  - Opportunities
- Future State (there will be four elements of your future state.) This week you will focus on the first three:
  - Development Strategy
  - Team Meeting Strategy
  - Collaboration Strategy

## Week Six

### Reflection

This week was focused on learning about your team’s customers. How your team creates, builds and leverages these partnerships will influence the results they are able to achieve. Take a few minutes to reflect on the following areas as it pertains to your team’s customers:

- Current Relationship
  - Strengths
  - Opportunities
- Current Process
  - What’s working/not working within the process?
  - How often do they assess the value of the process with you?
- Where are opportunities for the team to create additional value with them?
  - What skills or tools would be needed to create that additional value?
- Does this customer’s focus align or conflict with their executive’s strategy? (refer to Week One)

### Building a Learning Team Strategy

- Continue to build your team’s strategy by incorporating additional elements, such as:
  - Future State (this is a continuation from Week 5, with the addition of the fourth element):
    - Process Strategy

## Building a Relationship Strategy

Continue to add to the assessment from Week One's strategy, as these customers are typically one to two levels down from the executives met during Week One.

Identify the role of each leader relationship as it pertains to the Learning Department:

- Advocate
- Advisor
- Adversary
- Neutral

Based on their role, build a strategy to leverage, grow, or manage this relationship.

## Week Seven

### Reflection

This week you will begin to formulate your final strategy presentation for next week. The strategies that you create are dependent on the knowledge, skills, and tools that you have as a leader. Take a few minutes to review your questions from the weekly leader discussions on *The Leadership Challenge* and your own SKEA. Reflect on the following areas as it pertains to your team's customers:

- How do I evolve as a Best-In-Class leader for my team?
- What Orange Book Behaviors do I need to build or strengthen to model the way for my team?
- How will I incorporate the Five Examples of an Exemplary Leader every day?
- What personal skills do I need to develop to be the most effective leader?
- What position skills do I need to develop to be the most strategic leader?

### Becoming a Best-In-Class Learning Leader Strategy

Create your own personal strategy on how you will become a Best-in-Class learning leader by incorporating elements, such as:

- Five Examples of an Exemplary Leader
- Year One Development Plan – this should incorporate opportunities around:
  - Skills
  - Relationships
  - Concentra organizational knowledge

## Week Eight

### Preparation

This week you will present your Learning Department Strategy. Your leader has provided the presentation template that you will use. Your one-hour presentation will incorporate the following components:



- Title Slide
- Presentation Objective
- Relationship Strategy
- Building Best-in-Class Learning Solutions
- Building a Best-in-Class Team
- Becoming a Best-in-Class Leader

### Performance

During your presentation, your leader and peers will assess your performance on the following criteria:

- Content
- Presentation Skills
- Consulting Skills
- Meeting Facilitation

## Appendix III

### Assessment

#### OVERVIEW

At the end of each week, the learners will be assessed on how well they completed each week's assignment through a scorecard. The scorecard will contain criteria that the learner will have to learn or perform on a weekly basis. They will be scored on criteria of whether or not they completed the assignment, and on a scale of 1-5 on how effective they performed the assignment.

There will also be a formal scorecard in Week 8 around their "presentation" which will be a 20% of the overall assessment scorecard.

The learner will also be assessed weekly on timely scorecard completion of all activities. The leader will review the scorecard and make sure it's completed before the learner can move onto the next week. This will ensure that the client standards and expectations from each learner are being accomplished. For the final project, the learner will be assessed on whether or not they are able to apply their knowledge to create a 2-year strategy framework for their team. They will need to demonstrate what they've learned in their final presentation and be assessed by their leader through observation with a formalized checklist of criteria (scorecard). The criteria will be selected on various components that will need to be included in the overall strategy plan.

Performance monitoring involves the instructor checking the progress of the scorecard completion around discussions, readings and activities. The learner will be expected to perform at a 4 or 5 on all tasks which will indicate mastery of the content. Instructor will conduct final learner scorecard evaluations upon them completing their core course material and evaluations. The final scorecard process will be signed off by the client, who is initiating the evaluations of each learner, and their progress through the course curriculum. The leader will use the scorecard to identify areas of opportunity and strengths, which will carry over into the learner's development plan.

### Learning Leader Weekly Scorecard

Concentra - Learning Leader Weekly Scorecard				
Employee Name:		Title:		
Manager Name:				
OVERVIEW	Activities/Discussions/Blogs	SCORE		
<b>Week 1 - Understanding Concentra's Strategy</b>		<b>RATING:</b>	<b>TOTAL:</b>	
The learner will build key relationships with leaders in Concentra's organization while learning the company strategy, culture, and leadership development.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 2 - Concentra's Services, Products &amp; Culture</b>		<b>RATING:</b>		
The learner will visit Concentra's centers and, attend field ride-alongs with sales. They will observe Orange book behavior while gaining a basic understanding of center colleagues roles (including sales), and Concentra's services and products.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 3 - Concentra's Support Functions</b>		<b>RATING:</b>		
The learner will meet with Concentra's center support functions to gain an overall understanding of the Concentra ecosystem.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 4 - Creating Learning Team Relationships</b>		<b>RATING:</b>		
The learner will meet with the different disciplines of the learning department to gain an understanding of the team culture, people, processes and purpose.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 5 - Create Learning Discipline Relationships</b>		<b>RATING:</b>		
The learner will meet with their discipline in the learning department to gain an understanding of the team culture, people, processes and purpose.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 6 - Discovery of Client Needs/Perceptions</b>		<b>RATING:</b>		
This topic advances the sales cycle by gaining agreement and commitment The learner will discover their client's perceptions of the team, while creating a strategic partnership.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 7 - Create a 2-Year Team Strategy</b>		<b>RATING:</b>		
The learner will continue to create their 2-year strategy for the team based on knowledge gained throughout the course.	• Learning Strategy Assignment		5	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Week 8 - Present 2-Year Team Strategy</b>		<b>RATING:</b>		
The learner will formally present their 2-year strategy for the team based on knowledge gained throughout the course.	• Learning Strategy Assignment - FINAL Presentation		30	
	• Leadership Challenge Discussion		5	
	• Orange Book Blog		5	
<b>Overall Comments</b>		<b>TOTAL RATING:</b>		
		0	145	
<b>Employee Signature</b>		<b>Manager Signature</b>		
Name:		Name:		
Date:		Date:		
<b>1 NOT EFFECTIVE</b>	<b>2 SOMEWHAT EFFECTIVE</b>	<b>3 STANDARD PERFORMANCE</b>	<b>4 VERY EFFECTIVE</b>	<b>5 EXTREMELY EFFECTIVE</b>
Learner failed to complete the task or demonstrate the task effectively.	Learner completed the task, but performance indicates several opportunities for improvement.	Learner performed the task exactly as described on the scorecard.	Learner performed above standard quality but not consistently excelling on all activities.	Learner consistently performed above standard quality, excelling on all activities.

### Final Presentation Scorecard

FINAL PRESENTATION SCORECARD		Concentra <sup>+</sup>	
Employee Name:		Title:	
Manager Name:			
OVERVIEW	SKILLS	SCORE	
<b>Content</b>		<b>RATING:</b>	<b>TOTAL:</b>
The following content was covered:	• SMART goals		5
	• Clear Strategies		5
	• Aligns to overall Learning Team goals		5
<b>Presentations Skills</b>		<b>RATING:</b>	
The learner consistently met the following competent presentation skills:	• Summarize key points of presentation		5
	• Professional Posture/movement around room (back straight and purposeful moves)		
	• Casual pace/pause of speaking allowing understanding and dialogue vs monologue		
	• Follows agenda efficiently / stays on topic		
<b>Consulting Skills</b>		<b>RATING:</b>	
The learner consistently met the following competent consulting skills:	• Advocates for interests rather than positions		5
	• Makes recommendations based on sponsors business goals and strategies		
	• Appropriately uses information gained during discussion with business SMEs and partners to make recommendations		
<b>Meeting Facilitation Skills</b>		<b>RATING:</b>	
The learner consistently met the following competent meeting facilitation skills:	• Establish attendance expectations		5
	• Indicate objective of the meeting and specific decisions (if applicable) that need to be made by end of meeting		
	• Develop clear next steps with dates and names		
<b>Overall Comments</b>		<b>TOTAL RATING:</b>	
		0	30
<b>Employee Signature</b>		<b>Manager Signature</b>	
Name:		Name:	
Date:		Date:	
<b>1 NOT EFFECTIVE</b>	<b>2 SOMEWHAT EFFECTIVE</b>	<b>3 STANDARD PERFORMANCE</b>	<b>4 VERY EFFECTIVE</b>
Learner failed to complete the task or demonstrate the task effectively.	Learner completed the task, but performance indicates several opportunities for improvement.	Learner performed the task exactly as described on the scorecard.	Learner performed above standard quality but not consistently excelling on all activities.
			<b>5 EXTREMELY EFFECTIVE</b>
			Learner consistently performed above standard quality, excelling on all activities.

## Appendix IV

### Level 1 Evaluation

Learners will provide feedback on effectiveness of the learning course by completing a Level 1 survey. The survey results will be reviewed quarterly for feedback and considered for course improvement. The client will assess all feedback and make updates to the course on a maintenance schedule. The Level 1 evaluation will be built in Concentra's LMS and deployed at the end of the course along with the Level 3 evaluation.

From a scale of 1 to 5, the learner will assess the course under the following criteria:

- Importance: The *importance* of the course to their roles and responsibilities.
  - Quality: The *quality* of the instructional design.
  - Quantity: The *quantity* of information for the learner to perform their daily job functions
  - Impact: The *impact* on providing perfect service.
  - Value: The learning contribution to the *value* of the patient and customer experience
  - Intent: The *intent* to apply to their daily job
-

## Level 3 Evaluation

The learner will be assessed through a Level 3 evaluation (behavior) on whether or not they were able to apply what they've learned. The Level 3 evaluation will be filled out from a combination of both management observation, and stakeholders involved in their learning process. It will be built in Survey Monkey and deployed by the Project Manager from the Learning team. The stakeholders/manager will fill out a formal evaluation on whether or not the new leader applied their learning, and the learner will fill one out on how well they felt they were able to apply their learning. This survey will reflect questions around how well the learner applied their knowledge of Concentra's products, services, culture and leadership beliefs. The questions will also evaluate the application around knowledge of the learning team's peoples, processes, and purpose. The feedback from this evaluation will assist the instructor/leader on creating the learner's future development plan.

There will be three Level 3 Evaluations that go out via Survey Monkey after the course is completed. One for the new hire (learner), one for the new hires direct leader, and one for the stakeholders/leaders that the new hire is meeting with in the first 8-weeks. It will deploy at the end of the course to the learner, instructor/leader, and their team's customers, learning team leaders, AST leader, CBO leader, senior leadership.

Course maintenance will be done annually based on both Level 1 and 3 results. The scorecard will also be considered and evaluated based on the timing and completion of assignments in the maintenance process. Learner evaluation scores and comments before the course changes will be compared to the learner evaluation scores and comments after the course changes are implemented.

The evaluations are as follows and will be deployed to the various groups involved in the course:

- New hire/Learner Evaluation – pages 3-6
- New hires Leader/Instructor evaluation – pages 7-9
- Sr. Leaders/Stakeholder evaluation – page 10

### Level 3 - New hire/Learner Evaluation

**How OFTEN have you used the application of knowledge or skills in the past 8 weeks on the following?**

Never 0	Some 25	Rarely 50	Frequently 75	Constantly 100
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- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

**How CONFIDENT are you in using the application of knowledge or skills in the past 8 weeks on the following?**

Low 0	25	Medium 50	75	High 100
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- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process

- Learning team purpose

**Please share any additional thoughts on the feedback above:**

**In the past 8 weeks how often has your leader (or other leaders) helped you develop your application of knowledge or skills on the following:**

None	1 time	2 times	3 times	4 times or more
<ul style="list-style-type: none"> <li>• Orange Book Behavior of Welcoming, Respectful and Skillful</li> <li>• Leadership behavior as outlined in the Leadership Challenge Book</li> <li>• Learning Strategy</li> <li>• Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support</li> <li>• Clinical Center knowledge</li> <li>• Operational Center Knowledge</li> <li>• Sales process knowledge</li> <li>• CBO knowledge</li> <li>• AST knowledge</li> <li>• Referrals knowledge</li> <li>• Organizational structure</li> <li>• Learning team process</li> <li>• Learning team purpose</li> </ul>				

**Please share any additional thoughts on your feedback above.**

**In the past 8 weeks how often has your leader:**

None	1 time	2 times	3 times	4 times or more
<ul style="list-style-type: none"> <li>• Observed you in your role working with a leader</li> <li>• Observed you in your role working with a colleague</li> <li>• Asked you to self-assess your performance</li> <li>• Provide feedback to you after a debrief</li> <li>• Conducted a 1x1 meeting with you</li> <li>• Conducted a team meeting/huddle with you</li> </ul>				



Have you had a wonderful Orange Book experience with a customer/leader/patient/colleague? Was there a time you demonstrated Concentra's values of being welcoming, skillful, and respectful? We'd love to hear about it!

- What was the situation with the leader/colleague?
- What did you say and do?
- What were the results of your actions?

**If you would like more training or support for the following knowledge areas in this course, please check all that apply:**

- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

**Since completing the Effective Learning Leaders course have you:**

- Met with your manager to discuss your Effective Learning Leaders course experience? Yes/No
- Met with your team to thank them and share your feedback and learning? Yes/No
- Shared your strategy, vision and values with your team? Yes/No
- Created short and long-term goals for improving your leadership practices? Yes/No
- Met with your class learning partner at least once? Yes/No
- Made adjustments in your leadership style based on your learning? Yes/No

**Please provide some examples how you have used your learning from the workshop:**

**Please provide specific examples of how the application of your learning has improved business**

**Results:**

**If respondents indicate “No” to any of the questions above are prompted to respond to the following question:**

*What has kept you from successfully applying your learning? (Choose all that apply)*

- Too busy
  - Lack of management support
  - Other higher priorities
  - Tried skills/techniques and didn't work
  - Other (Please specify)
-

### Level 3 – Instructor/Leader Evaluation

**How OFTEN have you used the application of knowledge or skills in the past 8 weeks on the following?**

Never 0	Some 25	Rarely 50	Frequently 75	Constantly 100
------------	------------	--------------	------------------	-------------------

- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

**How CONFIDENT are you in using the application of knowledge or skills in the past 8 weeks on the following?**

Low 0	25	Medium 50	75	High 100
----------	----	--------------	----	-------------

- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process

- Learning team purpose

**Please share any additional thoughts on the feedback above:**

**How OFTEN have you or another leader helped the new hire develop their application of knowledge or skills in the past 8 weeks on the following?**

Never	Some	Rarely	Frequently	Constantly
0	25	50	75	100

- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

**Please share any additional thoughts on your feedback above:**

**In the past 8 weeks how often have you:**

None	1 time	2 times	3 times	4 times or more
------	--------	---------	---------	-----------------

- Observed the new hire working with a leader
- Observed the new hire working with a colleague
- Provided feedback to the new hire after a debrief
- Conducted a 1x1 meeting with your new hire
- Conducted a team meeting/huddle with the new hire

**Please share any additional thoughts on your feedback above:**

**If you would like more content, training, or support for the following knowledge areas in this course, please check all that apply:**

- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior as outlined in the Leadership Challenge Book
- Learning Strategy
- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

### Level 3 – Leaders/Stakeholders Evaluation

**How well did the new leader demonstrate the knowledge or skills in your meeting on the following?**

Please rate each area on a scale of 1-5:

<b>1</b> <b>NOT EFFECTIVE</b> Learner failed to complete the task or demonstrate the task effectively.	<b>2</b> <b>SOMEWHAT EFFECTIVE</b> Learner completed the task, but performance indicates several opportunities for improvement.	<b>3</b> <b>STANDARD PERFORMANCE</b> Learner performed the task exactly as described on the scorecard.	<b>4</b> <b>VERY EFFECTIVE</b> Learner performed above standard quality but not consistently excelling on all activities.	<b>5</b> <b>EXTREMELY EFFECTIVE</b> Learner consistently performed above standard quality, excelling on all activities.
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- Meeting preparedness - ask questions of department leaders around their strategy and how you as a learning leader can support
- Orange Book Behavior of Welcoming, Respectful and Skillful
- Leadership behavior
- Learning Strategy
- Clinical Center knowledge
- Operational Center Knowledge
- Sales process knowledge
- CBO knowledge
- AST knowledge
- Referrals knowledge
- Organizational structure
- Learning team process
- Learning team purpose

From your perspective are there any other learning opportunities that would help the new leader be successful in their role?