



Independent Consultants

Specialists in corporate analysis, investigation, management & leadership

[REDACTED]

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Dear [REDACTED]

Further to our recent discussion regarding the provision of Leadership training to certain FWBC employees, I have developed the following proposal.

I note from our initial discussions, that the Director is keen for the training to be provided to both leaders and potential leaders within your organisation.

I understand that research was undertaken to determine the type of skills that were identified as lacking among your current leaders and that there was identified strong support for a program that could improve their effectiveness as team leaders.

The research identified that many staff could manage the procedural requirements of their role but felt they could benefit from a program of study which would enhance their people management skills.

I also understand that the goal of any such program is to focus on practical skills as against one that is focused on theory.

Having examined the research, I have attached a proposal which;

- Focuses on the practical application of skills,
- Is very much case study based,
- Requires participants to demonstrate skills and principles,
- Provides a 360° assessment by the candidates' Managers, peers and staff alongside a self-assessment prior to the commencement of the program,
- Is intensive and requires a strong commitment of the candidate,

- Requires a candidate to demonstrate their understanding of leadership theories,
- Allows for the parallel conduct of an exercise designed by the organisation which requires candidates to demonstrate leadership principles in an exercise based on FWBC scenarios; and
- Involves a post program and exercise completion, self-assessment and evaluation by the facilitators.

It is recommended that this program be considered part of an ongoing and organisation wide structured leadership Program which includes a number of tools including executive coaching, specific identified placements of candidates and other learning opportunities.

It is understood that the candidates for this initial leadership program are all EL 1 and 2 leaders (some 30 in total requiring the program to be delivered on two separate occasions).

The topic areas to be covered in this initial program include, but are not limited to:

- Identifying leadership styles and the qualities of effective leaders
- Leadership and communication
- Feed front – setting expectations and establishing standards of performance
- Understanding motivation and assertiveness
- Group problem solving and conflict resolution
- Providing effective feedback
- Delegating and decision making
- Understanding emotional intelligence

A program has been designed which is up for negotiation with FWBC.

In very broad terms, there are three specific phases of the proposed program¹.

Phase 1 –Initial Preparation Stage - candidates will, as part of this phase, undertake a series of exercises prior to attending the group learning sessions. This will include a 360° peer assessment and self-assessment as well as specific learning exercises such as the preparation of a group presentation and summarising relevant articles.

Phase 2 - Group Learning Phase - candidates will attend a central location (Melbourne) and over a three and a half day period undertake an educational program comprising a number

¹ Expanded upon later in this document.

of modules and exercises delivered by the external facilitator, some of which are completed in tandem with FWBC staff².

The topic areas to be covered in this initial group learning phase have already been outlined.

The idea of this particular phase is to develop emotional intelligence skills using a series of activities and group exercises.

Part of this will involve the candidate identifying stereotypes that impact on relationships and effectiveness within the workplace.

Some of the exercises will focus on managing meetings, self-governance , accepting change, assessing team performance, non-judgemental critique of team performance and creating team synergy.

The process is participant based with the readings and academic learning underpinning and informing practice which will have to be demonstrated by the candidates through completion of the exercises.

The exercises include both individual and group involvement and conclude with a presentation by both the group and also individually to the Director (and any person nominated by that officer).

This phase is also the opportunity to explore the FWBC specific exercise designed by organisational representatives.

Phase 3 - Post group learning analysis and personal evaluation

The final phase involves the candidate completing various tasks identified as a consequence of his/her performance and demonstrated capacity shown throughout the earlier phases.

It will build on information obtained during the self-assessment and initial 360° assessment with an expectation that candidates will provide an ongoing analysis of their own performance, strengths and weaknesses and challenges.

Facilitation details and responsibilities of the parties

The training will be principally³ provided at the office of FWBC in Melbourne.

The responsibilities of FWBC will be as follows:

² The final half day (which is recommended although beyond the initial scope of the program outlines) allows for both a group and private presentation to the Director as well as individualised feedback. It is also an opportunity for the Director to provide the candidates information about their obligation and his expectation of them.

³ Still to be finally determined and will be based on the needs of assessment exercises.

- To identify and notify relevant candidates of the program and arrange their attendance;
- To provide the facilitator with contact details so that direct contact can be made in relation to phase 1 pre-program activities including the 360° assessment and self-assessment;
- To provide each candidate with a relevant text once it is determined which is best suitable to the need;
- To provide training rooms (1x main room and two syndicate rooms) on FWBC premises;
- To provide training tools such as whiteboard, A5 paper and pens etc;
- If it is possible, the organisation will be required to provide a camera within one of the syndicate rooms that can both record in digital format and also be monitored in the main training room to facilitate role-play activities;
- If camera and monitor are unavailable, the facilitator will provide same;
- To provide morning/afternoon tea and lunch as required; and
- To ensure the presence of Director or nominee on the final day of each program.

The responsibility of the facilitator is to:

- Prepare the suitable educational package;
- Arrange all personal travel and accommodation;
- Facilitate the delivery of the various phases including developing the self-assessment package and arranging for the candidates to complete the same;
- Managing the 360° feedback process including analysing all available material after contact made with participants and those nominated after preparing a tailor-made assessment package;
- Providing the various candidates with suitable readings and program instructions;
- Identifying to the organisation a relevant text to be issued to each participant;
- Preparing the various exercises that will be used to educate and assess candidates on the various topic areas;
- Ensure the exercise (as prepared by FWBC) is managed and incorporated into the program and assist with its presentation and conduct;

- Arrange for the attendance of external individuals to be utilised in scenario roles;
- Provide an overall assessment of each staff member taking into account the candidates personal self-assessment, the 360° feedback, participation and understanding of the issues as evidenced by them during the program and also of any presentation et cetera;
- Facilitate the delivery of a presentation by each candidate to the Executive Director at the end of phase 2; and
- Provide an invoice to FWBC at the conclusion of the training which incorporates all costs and expenses.

The proposal has the following costing which can be negotiated as required.

A daily rate of [REDACTED] plus GST for the principal facilitator will be applicable⁴.

The use of any casual facilitator will be based on a similar daily rate⁵.

The use of any role player will be based on a reduced daily rate⁶.

All accommodation, transport and travel costs will be met by FWBC upon presentation of invoice by the facilitator.

The likely number of days to develop, action and undertake the program is set out below.

Note that beyond the 8 days of program delivery, a significant period of time is required to properly collate and analyse the 360 degree and self assessment material and this is seen as critical to the process.

Activity	Projected number of days required to complete activity
Initial planning day with agency representatives in relation to exercise and program.	1
Initial planning and development of group and individual exercises and 360° feedback instrument and self-assessment instrument.	3
Initial Contact with each participant, provision of readings and self-assessment tool and request for them to provide contact	1

⁴ Thus making facilitator costs approximately [REDACTED]

⁵ Through negotiation, it is possible to obtain the services of other experienced leaders to provide unique presentations to the group.

⁶ Through negotiation, it is possible to use the services of other FWBC employees who have previously demonstrated high capacity for scenario work and ability to store information and respond to complex situations effectively.

details for 360° survey participants (2 x managers, 2 peers and 2 staff). All information to be collated.	
360° survey tool sent to each person nominated by candidate (30 candidates x 6 persons nominated by candidates = 180 surveys to be provided).	1
Collation of survey results	3
Phase 2 program (2 groups of 15 over 4 days each time)	8
Phase 3 information collation, evaluation, additional tasking and program completion.	2
Final wrap-up - summaries	1
ESTIMATED TOTAL DAYS REQUIRED	20

If you agree with the proposal, the package could be further developed in the coming weeks with training being delivered from mid-March or April 2015.

The first stage in proceeding with the proposal would be to meet with yourself and [REDACTED] to determine how best to manage the FWBC exercise into the overall program.

Please feel free to raise any further issues with me and if you consider the proposal has merit, I would be more than happy to work with you on its achievement.

I look forward to hearing from you.

David Madden.
Director/Investigator
Dbm Independent Consultants.

Program detail expansion

Provided below is an expansion of the three phases of the program.

1. Phase 1 –Initial Preparation Stage

Candidates will be required to prepare for the program by undertaking a series of specific activities prior to them physically attending for the program.

This will include the following:

A tailor-made 360° feedback program - using specific leadership skills and those identified via the FWBC internal research, a 360° assessment program will be created and administered by the facilitator.

This will require the candidate to identify two persons they are currently managing, two of their peers, their direct manager and one other manager who will be sent a confidential 360° feedback instrument which they will complete based on their knowledge of the candidate.

The assessment will include both qualitative and quantitative information and following completion, will be collated and summarised for presentation to the candidate.

Candidates Self-assessment - the candidate will be required to complete a tailor-made self-assessment which seeks to identify the candidates appreciation of their own skills and abilities, strengths and weaknesses and capacity as a leader.

They will be required to identify what they hope to achieve from the program and what skills they will be endeavouring to develop both during and after the program.

The information gathered through this particular exercise will be compared to the 360° feedback results and also presented to the candidate during the program.

Analysis of various readings - the candidate will be provided a list of readings which they are expected to read prior to attending for the program. This series of readings will include articles on leadership, skills and qualities of leaders, emotional intelligence and maximising a leaders potential.

Preparation of leadership presentation - each candidate will have identified one particular article/leadership issue that they will be required to present to the rest of the candidates during the residential program.

They will be required to forward the presentation to the facilitator prior to attending the residential program.

The presentation will be used to assess both their understanding of the leadership readings and also their communication skills and capacity to impart to others complex ideas.

2. Phase 2 - Group Learning Phase

Candidates will attend a central location (Melbourne) and over a three and a half day period undertake an educational program comprising a number of modules and exercises⁷ delivered by the external facilitator⁸.

The Phase II program builds on the foundational work undertaken in Phase 1.

The precise structure of this aspect of the program is to be negotiated with FWBC but will include the following:

⁷ There is very little "lecture" type presentation. Instead a series of exercises will be undertaken which involve individual and group thinking/action. These include individuals presenting to the group, group discussions about various aspects of a case study, scenario and role play exercises and presentations. The emphasis is upon the individual learning through action and self awareness as against any lecture.

⁸ The final half day allows for the group and presentation to the Executive Director as well as individualised feedback.

- Elements of leadership
- Leadership styles
- Emotional intelligence
- Communication skills
- Problem solving
- Management(Delegating/Accountability)
- Coaching
- Team Building
- Motivation
- Decision making
- Ethics

These issues will be addressed by the candidate examining and analysing various case studies and being required to identify the key skills, leadership problems and issues that emerge through the examination of these case studies.

The case studies will be prepared by the facilitator.

There will be an emphasis on the candidates being required to present to their colleagues on various issues, thus demonstrating their capacity to communicate, analyse and understand individual and organisational dynamics.

Technology which allows for the videoing of candidates during presentations would be used to emphasise points and to ensure wider teaching within the group.

At various stages, the candidates will be required to individually undertake a case study scenario using a role player which will require them to demonstrate leadership skill and significant emotional intelligence which will be assessed by the facilitators (and by selected other candidates).

These role-plays will require them to assess information and the situation and decide upon the most appropriate response whilst at the same time recognising their personal values and those of the person with whom they are communicating.

For example, one such scenario requires the leader to counsel a staff member about their poor performance, whilst simultaneously having them agree to act in the team leaders position when they are away on holidays, all done within a strict timeframe with the manager being required to attend another urgent meeting within five minutes.

Such a scenario draws upon considerable skills of the person being assessed and requires them to demonstrate a number of concepts simultaneously.

Individual role-plays will via technology be shown to the rest of the group, some of whom will also have the opportunity to provide critique of their peer's performance and capacity, thus further developing their skill in assessment and communication.

Proper debrief will occur following the completion of the case study and the way in which each candidate manages these individual scenarios will be videotaped and presented to the candidate for private analysis.

There will also be written assessment throughout the program with candidates being required to provide written submissions about various aspects of the case studies. Some of this activity will need to be undertaken by the individual outside of work hours to maximise the face-to-face opportunities.

Each of the candidates will without notice or prior warning be required to present to the group on a specific issue, thus testing their capacity for spontaneous analysis and effectiveness of communication.

It is understood that FWBC has developed an exercise for delivery during the program and the facilitator will work in tandem with the exercise authors to facilitate the exercise delivery.

The final stage of the residential program will require the candidate to present their strategy for improving their own leadership skills to the Director FWBC.

They will be assisted by the facilitators in preparing the presentation and it will be used as a guide for post-program assessment.

In effect they will have to present a response to the following questions:

- *How would I describe my leadership capacity?*
- *What are my leadership weaknesses?*
- *What are my leadership strengths?*
- *How am I going to improve my leadership skill?*
- *The improvement of my leadership skill will be evident within only a few months by (what?).*

All candidates will be required to complete a program evaluation at the end of phase 2.

3. Phase 3 - Post group learning analysis and culmination??

The final phase involves the candidate completing various tasks identified as a consequence of his/her performance and demonstrated capacity shown throughout the earlier phases.

It will require a written submission to the facilitator about concepts of leadership and changes in their behaviour.