



TENNESSEE VALLEY AUTHORITY
TVA CHALLENGES OF FIRST-LINE LEADERSHIP 3.0
THE LEADERSHIP INSTITUTE
IMPLEMENTATION PLAN

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Project Description

The University of Tennessee Instructional Technology class, *Instructional Systems Design* (IT570), analyzed the TVA course, *Challenges of First-Line Leadership* (CFL 2.0), and presented their recommendations for revision on July 6, 2010. TVA has reviewed the recommended revisions and supports a redesign of Module 4 and the creation of a tutorial for the 'Supervisors Toolkit'. Currently, nine students from the Instructional Media Development class (IT578) are working in two teams to facilitate these changes. Team A has created a tutorial for the Supervisors Toolkit and Team B has redesigned Module 4.

Team B has prepared this Implementation Plan which provides the prototype for a revision of Module 4 of CFL 2.0. It also provides updated content for the Facilitator's Guide for Module 4 as well as PowerPoint slides to present the content of the module. Recommendations for implementation also include testing and evaluation protocol.

Project Scope

The Tennessee Valley Authority (TVA) serves the Tennessee Valley through energy, environment, and economic development. TVA includes a Training and Development Department which provides training to all employees in two main sites: Chattanooga and Knoxville, TN. Their *Challenges of First Line Leadership 2.0* course serves as an interactive and highly relevant learning experience in effective first-line leadership skills.

Course assessment feedback from TVA trainers and course participants recommended some possible changes that might improve Module 4. Our group, Team B, has concentrated on the redesign of Module 4, *Motivational Foundations of Performance Management*. This module explains the role that human needs and different patterns of employee motivation play in maintaining workplace motivation and employee engagement. It also explores different behavioral styles and situational coaching needs of individual employees, as well as how to give appreciative feedback.

Our revisions include an emphasis on simplifying the Maslow motivational needs model, a reorganization of the leadership content, eliminating repetition within behavioral styles, updating the situational leadership model and strengthening the feedback segment. We have also improved continuity by incorporating the DiSC personality assessment in regard to leadership and motivation.

Deliverables

Our team is providing a template and implementation plan for a final, TVA-produced learning product. The specific deliverables include:

- Redesigned workbook module
- Updated training guide for facilitators for this module
- PowerPoint presentation slides with facilitator's notes

Team

Design work on Module 4 has been divided as follows:

- Mary Morse (mmorse@utk.edu): Great leadership and Employee Engagement
- Patricia Dueber (musicislife4me@aol.com): Maslow's Hierarchy of Human Needs
- Stephanie Dueber (sdueber@utk.edu): Behavioral Styles
- Christine Riggs (cjriggs@utk.edu): Situational Leadership
- Doug Trovinger (doug.trovinger@gmail.com): Appreciative Feedback

Part One

Learning Product Design Summary

Target Learner

Our target learner is varied and can consist of newly promoted first-line supervisors, team leaders, foremen, and field and office personnel. The class audience has shifted over time to include employees who have leadership training on their personal development plan and workers who aspire to be or have been identified to become future supervisors. These employees are dedicated to their job and either have a GED, diploma or advanced degree. The final learning products are designed to provide reliable information in a manner that is clear and easy to understand for all participants.

The target learner has a need to fully understand the role of the first-line leader. Typically, a new first-line leader transitions from team member to team leader and must therefore know how to communicate effectively with both employees and management. They must motivate, empower and bond team members. They must facilitate their associates' growth and development. They must demonstrate effective conflict resolution, feedback skills and daily management techniques. The learner must understand his or her personality in leadership and realize the strengths and weaknesses in this personality type and know how to communicate effectively with other personality types.

Design Foundation

Benjamin Bloom extensively researched the complicated concepts of learning, teaching, identifying instructional goals and thinking. Bloom's Taxonomy is one of the first systematic classifications of the processes of thinking and learning. It is an appropriate system to illustrate the degree to which we want the learners to comprehend and utilize concepts, to acquire and demonstrate new skills, and to have their values, attitudes, and interests positively affected. In this document, we will use the revised version of Bloom's taxonomy to describe the thinking skills targeted for CFL course participants (Anderson & Krathwohl, 2001; Bloom, 1956).

Content Treatment

The following five charts detail the content treatment of Module 4. The content learning outcomes, teaching and learning strategies, recommended assessments and justifications for change are included.

<p><u>Great Leadership and Employee Engagement</u></p> <p>Section Goal: Increase employee satisfaction and engagement with great leadership and increased workgroup productivity will follow.</p>				
Content Unit: Leadership	Learning Objectives	Teaching/Learning Activities	Learning Assessment	Justification
<p>A. Great leadership and employee engagement.</p> <p>B. Three levels of leadership</p> <p>C. Characteristics of great leadership</p>	<p>The participants will be able to:</p> <ul style="list-style-type: none"> • Recognize the positive impact of great leadership on workgroup productivity • Evaluate the characteristics of three levels of leadership and the effects on employee behavior • Integrate great leadership skills into their management style to “take it to the next level.” 	<p>Present concepts of great leadership and its effect on employee engagement using lecture with PowerPoint and printed manual.</p> <p>Strategies:</p> <ul style="list-style-type: none"> • Discussion of leadership impact. • Cooperative learning with participants providing examples of employee reaction to each level of supervision. • Participants will compile a list of great leadership skills that fit with their leadership style and commit to their use. • Devise plans to support employees using leadership skills. 	<p>Informal assessment can be accomplished by the course facilitator during the following activity:</p> <ul style="list-style-type: none"> • Participants will use the list of great leadership characteristics to formulate plans to motivate specific employees (caution participants to avoid using real names). • They will be instructed to develop: <ol style="list-style-type: none"> 1. a plan using inspiration 2. a plan using intellectual stimulation 3. a plan using individualized consideration. 	<p>The leadership content section has been reorganized to better follow Bloom’s Revised Taxonomy (Anderson & Kratwohl, 2001). By reorganizing the content, the learner is allowed to build on the concepts from understanding to valuing and on to application in problem-solving. The final assessment for this section allows the learner to create a plan for applying great leadership skills to solving a real life problem.</p>

<p style="text-align: center;">Maslow's Hierarchy of Human Needs</p> <p style="text-align: center;">Section Goal: Maintain workplace motivation and employee engagement by recognizing employee needs and motivational patterns.</p>				
Content Unit: Human Needs and Motivational Patterns	Learning Objectives	Teaching/Learning Activities	Learning Assessment	Justification
<p>A. Story of two ships, one lead by such an inspiring Captain that the ship, though older and not as technologically advanced, keeps coming in 1st place when paired with the other ship.</p> <p>B. Maslow's Hierarchy of Human needs.</p> <p>C. Two basic types of human behavior based on needs.</p> <p>D. Effective supervision of the two basic behavior types.</p> <p>E. Common ways supervisors demotivate employees.</p>	<p>The participants will be able to do the following upon completion of this portion of the module:</p> <ul style="list-style-type: none"> List needs employee needs met by good leadership. List needs not met by poor leadership. Recognize the Maslow hierarchy of Human Needs model. Identify two basic types of behavior based on needs. Understand what demotivators are and how leaders can damage employee morale with them. 	<ul style="list-style-type: none"> Real-world example to emphasize relevance of material and engage learners Introduction to human needs model using manual, lecture PowerPoint and self-test Learners will discuss adapting leadership styles to meet the needs of two basic behavior styles of employees Activities Workbook Discussion Self-test Tell own story of demotivation 	<p>The participants will be evaluated by the following methods:</p> <ul style="list-style-type: none"> Learners will discuss and chart needs met by good leadership/not met by poor leadership. After instruction on Maslow's Hierarchy of Needs and how it works, learners will take a quick self-test. Learners will show an understanding of demotivators by sharing a story of demotivation that they experienced. 	<ul style="list-style-type: none"> A real-world story engages learners. Maslow's Hierarchy of Needs was chosen over other models because it is considered the classic model for understanding the needs all people have in common. The content has been modified to directly relate To contemporary management course work. The thread of motivating employees runs throughout the Module.

<u>Behavioral Styles</u>				
Section Goal: Understand employees' behavior styles to make more effective work assignments.				
<u>Content Unit: Behavioral Styles</u>	Learning Objectives	Teaching/Learning Activities	Learning Assessment	Justification
<p>A. Graphic describing the different task and relationship needs of the four behavioral styles.</p> <p>B. Handout of DiSC Behavior Chart.</p> <p>C. The “How to change a light bulb” activity.</p> <p>D. Eliminating repetition of material on task and relationship needs of the four behavioral styles.</p> <p>E. Redoing sheet on Disc behavior chart as a handout.</p>	<p>The participants will be able to do the following upon completion of this portion of the module:</p> <ul style="list-style-type: none"> • Recognize and apply the different task and relationship needs of the four behavioral styles. • Review DiSC behavior traits. • Fill out a worksheet in a group motivating an employee to change a light bulb according to his or her DiSC personality. 	<p>Lecture leaders will briefly discuss the different task and relationship needs of the four behavioral styles and review the DiSC characteristic chart.</p> <p>Lecture leaders will then break the classroom into four groups according to DiSC personality trait and each group will fill out a workbook page instructing a person of their opposite DiSC personality trait as to how to change a light bulb.</p> <p>Strategies:</p> <p>Workbook activity on how to change a light bulb</p>	<p>The participants will be evaluated by the following methods:</p> <ul style="list-style-type: none"> • Learners evaluated informally through discussion and questioning about different task and relationship needs of the four behavioral styles and comprehension of DiSC personality styles. • Learners will be evaluated by instructors watching their group work and checking to see that students correctly fill out the workbook page. 	<ul style="list-style-type: none"> • Students can learn about motivating employees according to their DiSC style. • Students can learn about motivating employees according to their task and relationship needs. • There is repetition in some parts of module 4 which needs to be eliminated

<u>Situational Leadership</u>				
Section Goal: Recognize that employee behavior style will determine the extent which you focus on task or relationship needs to best motivate and engage the employee.				
Content Unit: Situational Leadership	Learning Objectives	Teaching/Learning Activities	Learning Assessment	Justification
<p>A. Introduction of situational leadership</p> <ol style="list-style-type: none"> 1. Task-focused behaviors 2. Relationship-focused behaviors <p>B. Fundamentals of situational leadership model</p> <ol style="list-style-type: none"> 1. Directing 2. Coaching 3. Supporting 4. Empowering <p>C. Examples and application of adapting leadership styles</p> <p>D. Situational leadership and its relationship with DiSC</p> <p>E. Personal reflection on situational leadership</p>	<p>The participants will be able to do the following upon completion of this portion of the module:</p> <ul style="list-style-type: none"> • Describe the difference between task-focused and relationship-focused behaviors. • Describe a characteristic of each of the four situational leadership styles. • Recognize and apply an appropriate supervision style for each stage of employee readiness. • Assess their supervisory styles using feedback from the DiSC, • Develop a personal action plan to strengthen their skill. 	<p>Overview of situational leadership fundamentals and introduction to the situational leadership model using lecture with PowerPoint and printed manual.</p> <p>Illustrating relevance (ARCS model): Facilitators will provide real-world examples to emphasize relevance of material and ask for examples from learners.</p> <p>Provide practice (Ross, 1988; Marzano, 1998): Learners will practice adapting leadership styles to meet the needs of learners and relate their DiSC personality profiles with their supervisory styles.</p> <p>Activities</p> <ul style="list-style-type: none"> • Workbook - Model • Pat exercise • Personal action plan 	<p>Informal assessment of learning can be accomplished by the course facilitator through observation of the following:</p> <ul style="list-style-type: none"> • Learners will be prompted to discuss the skills of a situational leader and applications of the four situational leadership styles in class. • Workbook exercises can be verified by instructors for accuracy. • Learners will be prompted to elaborate on concepts and techniques by relating them to personal experiences. • Learners will use skills to devise a personal action plan. 	<ul style="list-style-type: none"> • The model has been updated to reflect Ken Blanchard's current model. • Real-world examples have been added to address course participant evaluations. • The content has been modified to directly relate to the DiSC assessment. • Goal setting (Locke, 1968): A personal action plan will strengthen learners' skills and assist in setting leadership goals.

Appreciative Feedback
Section Goal: Expect the best of your employees, but motivate them to go above and beyond the status quo with appreciative feedback.

Content Unit: Appreciative Feedback	Learning Objectives	Teaching/Learning Activities	Learning Assessment	Justification
<p>A. Fundamentals of Appreciative Feedback</p> <p>B. Characteristics and Examples of Appreciative & Positive Feedback</p> <p>C. Appreciative Feedback and the use of Maslow.</p> <p>D. Application of Feedback Topics via Scenarios of the four persons throughout the Module.</p>	<p>The participants will be able to do the following upon completion of this portion of the module:</p> <ul style="list-style-type: none"> • Define the term “appreciative feedback.” • Apply appreciative feedback / positive reinforcement successfully in the workplace. • Diagnose various scenarios and give positive feedback in role-play situations. 	<p>The lesson will begin with a lecture of the concepts of appreciative feedback. Includes a brief discussion of the Managing From The Heart video. The students will be offered a chance to give their views on what appreciative feedback is. Students will tie the Maslow model to their understanding of appreciative feedback. PowerPoint and the printed manual will be used for these activities:</p> <ul style="list-style-type: none"> • Active Participation during lecture • Three to four scenarios • Workbook Questions • Role-Play During Wrap-Up 	<p>Informal assessment of learning can be accomplished by the course facilitator through observation of the following:</p> <ul style="list-style-type: none"> • Question/Answer: Students will be directed to answer short questions in workbook on what appreciative feedback entails. Answers will be discussed with the others in the group. • Role-Play: Students will analyze and provide feedback to others in class as they apply skills learned in several scenarios. They will also be asked to share their real-life experiences with providing or receiving feedback. • Goal Setting: Students will be asked to explain how becoming proficient at appreciative feedback can benefit their leadership style and their employees. 	<ul style="list-style-type: none"> • This part of the module has been built up to assist the students in gaining an understanding of appreciative feedback. • The goal is for students to understand that appreciative feedback is one of the most important concepts of motivation and how it can be applied in the workplace. • Activities based on past experiences within our team can benefit the learners with this topic. • The group and self-reflection activities planned for the module will assist the learners to gain a more powerful understanding of appreciative feedback and be a great lead-in to Module 5.

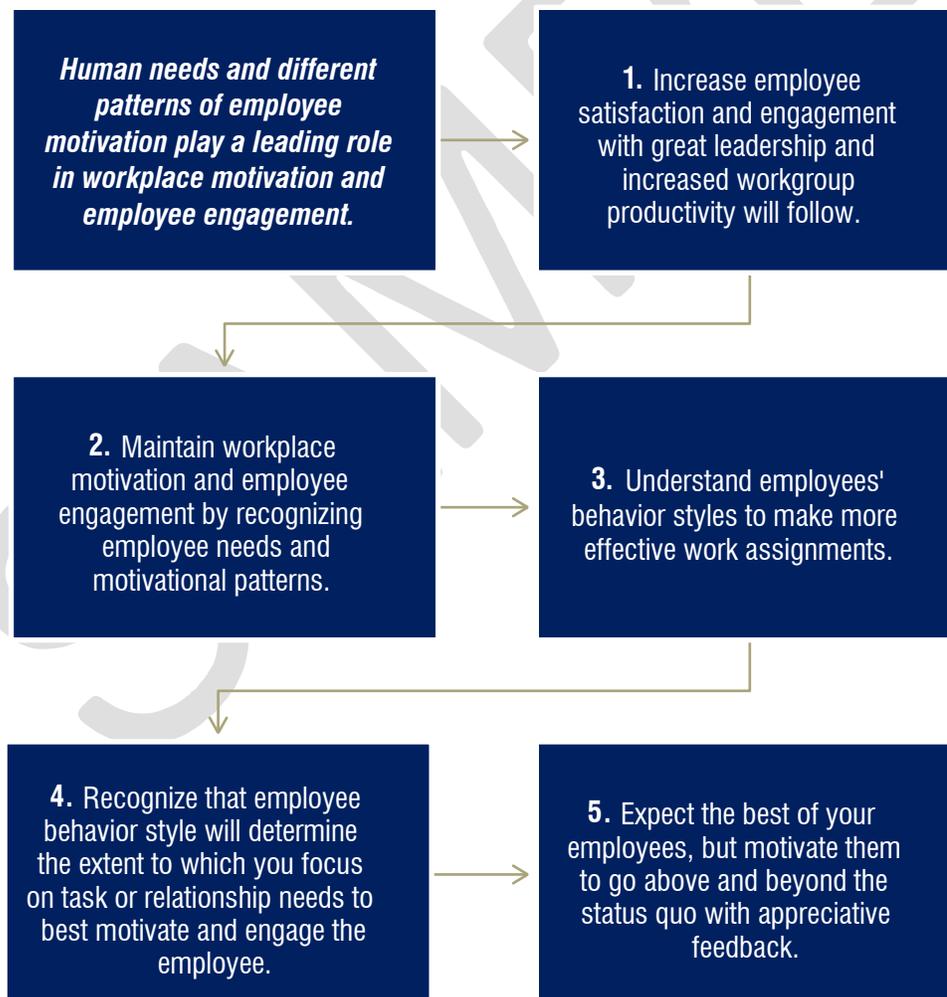
Justified Features and Design Elements

The content document has been designed to mimic the current structure and format of the other modules of the CFL 2.0 course. This also includes the choice of fonts, spacing and arrangement of data. The customary module overview, objectives and leadership behaviors have also been retained.

Learner Engagement and Flow

The Facilitator's materials include blue italicized instructions to provide tips on how to guide and engage the learners. The majority of the presentations will follow the text in the workbook as the facilitator moves from one slide to the next.

The following flow chart illustrates the main objectives and flow of the Module 4 instruction. This module will provide participants with the skills necessary to positively motivate their employees. Participants will learn how different motivation patterns, behavioral styles, and leadership styles interact to impact employee motivation. They will also learn how to improve motivation through feedback that is specific, appreciative, and suited to the individual.



Part Two

Recommended Evaluation Measures

Usability Testing and Protocols

Team B recommends that the instructional material for Module 4 undergo two additional reviews beyond what has already been completed with TVA and Team members.

1. **Review by senior management.** This review is primarily to make sure that content is accurate and in alignment with the company's goals for this Module.
2. **Review by current managers.** This review should concentrate on how applicable the material is to the manager's job. Will it help them better motivate and support their employees?

Two levels of usability testing are also recommended.

1. **Usability testing by current training facilitators.** Facilitators should ideally use the instructional materials with one or more actual classes and comment on the following:
 - Is the instructional level of the materials appropriate for your audience?
 - Are the directions and instructional content clear and concise?
 - Please comment on the instructional flow – especially areas that might be difficult to accomplish in the classroom. Do you feel it will be work in the classroom?
 - Please comment on the mix of lecture and activity components. Are there too many or too few interactive components?
 - How well do you think the students will engage with the material and learning strategies?
 - Please share any other comments you might have about these materials.
2. **Usability testing by Challenges of First-Line Leadership class participants.** Class participants should comment on the following:
 - Are the directions and instructional content clear and concise?
 - Please comment on the mix of lecture and activity components. Are there too many or too few interactive components?

- Were the lecture materials and activities interesting and valuable to your job?
- Please share any other comments you might have about these materials.

Instructional materials should be revised as necessary according to results of the above reviews and testing.

SAMPLE

Iterative Revision Report

These learning products have been reviewed two times by the client and have undergone usability testing. The results of those reviews and the testing are summarized in the Iterative Revision Report included in Appendix A of this document starting on the next page.

SAMPLE

Appendix A Iterative Revision Report

Throughout the process, recommendations and issues came up while we were creating the document. Listed below are a summarized list of the recommendations, options, and issues and how we addressed them. Each section is listed by the corresponding location within the document. As you, the client, read through, notice the various types of challenges we worked through to get to the goal of a polished product. Please note that this duplicated within the *TVA Leadership Course Proposal* report as Appendix D – Iterative Review Report.

Client Review Analysis

Section of Comment Focus	Suggested Change	Person Recommending Change	Decision and Rationale For Reason
Executive Summary	Adjust second paragraph on to better reflect a summary of the document	Dr. Larson	Completed <i>Assists reader with a top-level view of the project document.</i>
Most Sections Within Document	Eliminate '2.0' from the Leadership Course titles and various text phrases in document. This occurs multiple times in the document.	Dr. Larson	Completed <i>Eliminates confusion with reader as to what we want to talk about.</i>
Most Sections Within Document	Tweak and adjust the target audience of the new / existing leadership course.	Dr. Larson & TVA Training Staff	Completed <i>We completed and refocused the audience to match the client's request.</i>
Section 1.02 Statement of Needs	Switch order of words around to better reflect supporting material	Dr. Larson	Completed <i>Minor change with major impact with document.</i>
Section 1.04 Target Learner Analysis	Confusing point regarding the personnel that the course would focus on.	Dr. Larson & TVA Training Staff	Completed <i>We revised the statement to better reflect the target learners of the course.</i>

Section 1.04 Target Learner Analysis	Recommendation on Figure 1.01 and its position in the document	Dr. Larson	Completed <i>Kept the same graphic in the current location and added it in Appendix A in a larger format.</i>
Section 1.05 Context	Unapproved picture was placed in the document. Recommended to remove to	Dr. Larson	Completed
Analysis	cause no harm to the client.		<i>Eliminated picture and added new view of room.</i>
Section 1.06 Content Analysis	Recommendation of summarizing data or making it into a table format for this section	Dr. Larson	Rejected Comment <i>After some discussion, we felt that the way we conducted the analysis was beneficial for the client in the way we had.</i>
Section 2.01 Analysis of Objectives, Strategies, and Assessments	It was recommended for our team to switch the order of the strategies column with the assessments column. The reason it was recommended was to make it easier for the reader to follow	Dr. Larson	Completed <i>By doing it this way, we felt that the flow of the table was much more fluid and easier to understand.</i>
Section 2.02 Course Evaluation & Survey	It was suggested to make the evaluation section much shorter – max of about 1 – 2 pages max. In this comment, it was also suggested to move the details into an appendix of its own.	Dr. Larson	Completed <i>Data was moved into Appendix B and a summarized section of the data was written in lieu of the hole in the assessment.</i>
Section 2.02 Course Evaluation & Survey	It was noted that the amount of time reviewing the data was not adding value to the data. They recommended adding the Likert Scale data into the analysis.	TVA Training Staff	Completed <i>In this draft, we added details in the summary and Appendix B with high-level data.</i>

<p>Section 2.02 Course Evaluation & Survey</p>	<p>The client mentioned that the distinctions between positive and negative aren't helpful. They continued on and mentioned that recommendations for improvements were more important than other comments.</p> <p>No recommendation was given as to what to do with the data. Perhaps delete or eliminate the data?</p>	<p>TVA Training Staff</p>	<p>Rejected Comment</p> <p><i>We felt that the analysis we completed was sufficient for the cause. However, we are concerned that the client may have blinders on and just wants to focus on recommendations and no other comments made.</i></p>
<p>Appendix A – Additional Documentation</p>	<p>It was recommended to add the survey that we created in class to give to the participants that was in the class we observed.</p>	<p>Dr. Larson</p>	<p>Completed</p> <p><i>We included the document in Appendix A.</i></p>

SAMPLE

Appendix B

Comprehensive Reference List

Please note that the reference list is comprehensive which includes references placed within this document as well as the Proposal Plan presented to the TVA Board of Directors and other executive personnel.

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