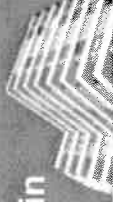


PMs and Supervisors will commit to holding each other accountable in team huddles



All huddle participants will be asked to commit to the team pledge:

- I pledge to arrive at huddles on time and devote my full attention to the meeting while I am there
- I pledge to listen and participate in the Huddle with an open mind
- I pledge to respect and be courteous to each Huddle Team member
- I pledge to refrain from embarrassing Huddle Team members
- I pledge to refrain from making the Huddle a gripe session
- I pledge to be supportive of decisions made by the Team
- I pledge to attend the huddles unless I am not in the office or have an unavoidable conflict – in the event of the conflict, I pledge to let the huddle leader know in advance that I cannot attend

A copy of the pledge will be printed and posted on the whiteboard for each team to refer to as needed

What are the qualities of a great huddle?



What they are

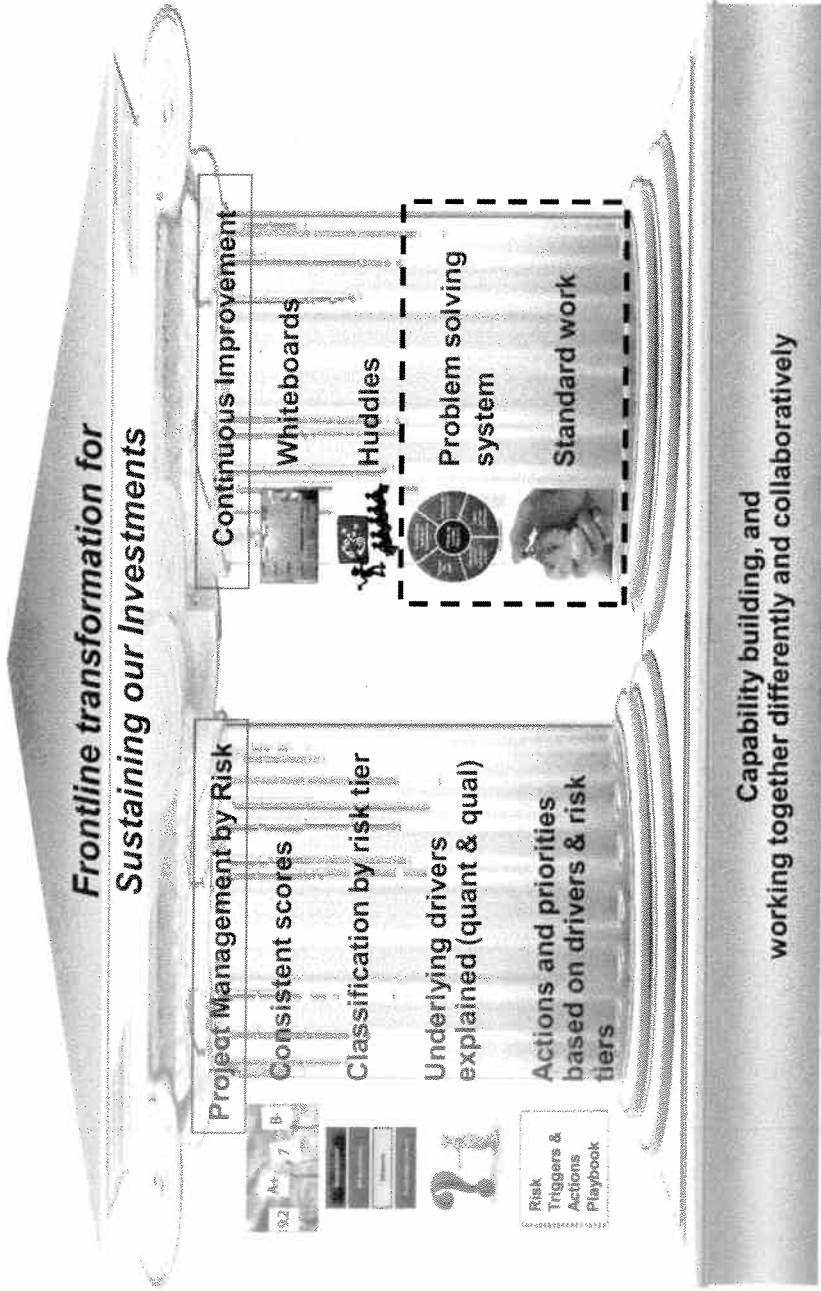
- Crisp, well-prepared, and tightly managed
- High energy with lots of positive reinforcement
- A celebration of team and individual successes
- A tool to
 - Provide feedback to the team
 - Optimize performance and communication within the team
 - Help individuals and teams prepare for each day/week
 - Communicate and implement change more rapidly



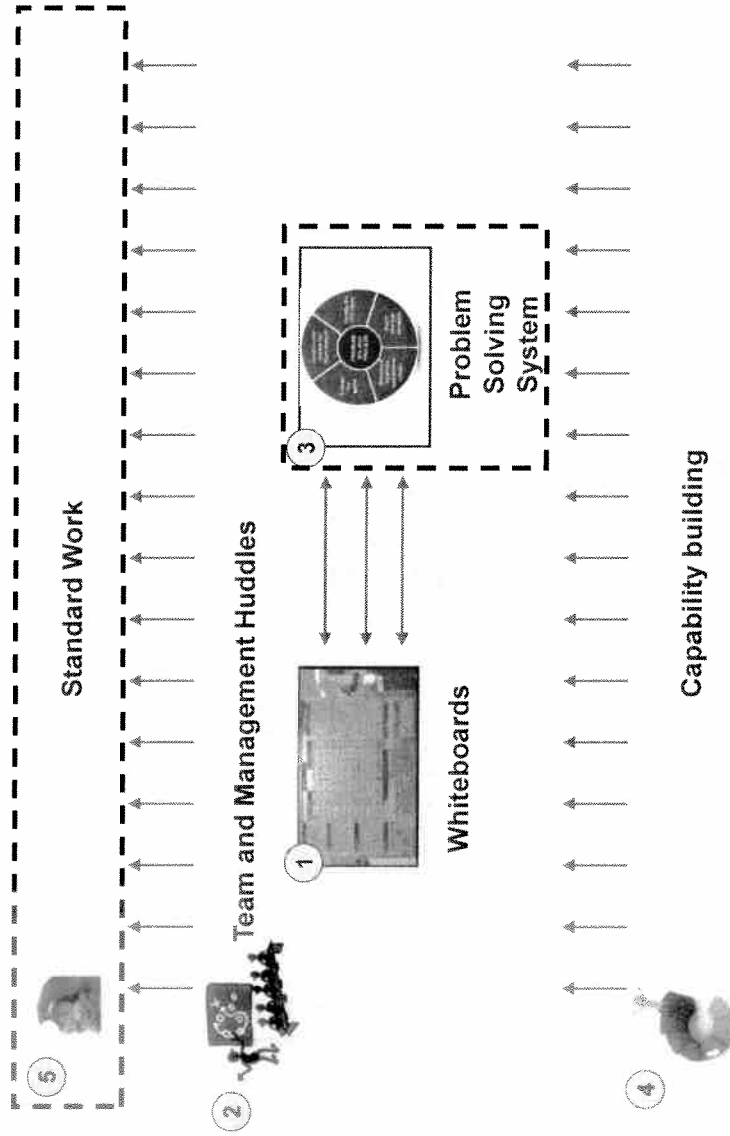
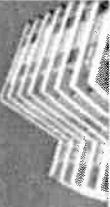
What they are not

- A replacement for general meetings
- A replacement for formal training
- A tool for individual coaching
- An opportunity to call out or embarrass specific individuals for poor performance
- A free-for-all gripe session
- A forum for unstructured brainstorming
- A tool for in-depth problem solving

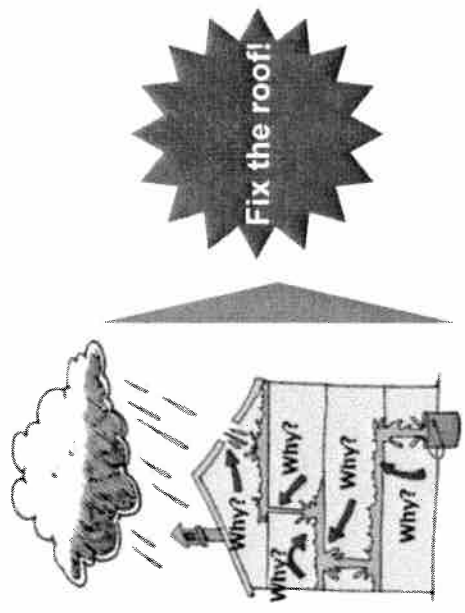
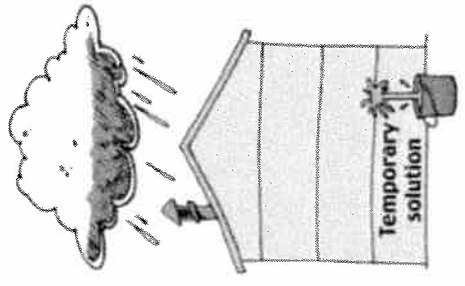
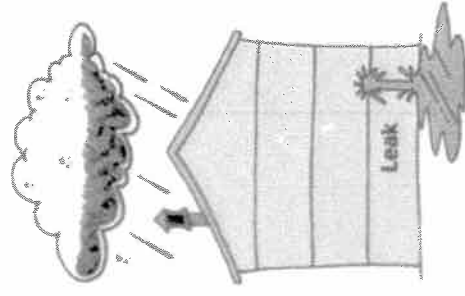
Sustaining our Investments will be built on two core pillars of change and a foundation of capability building



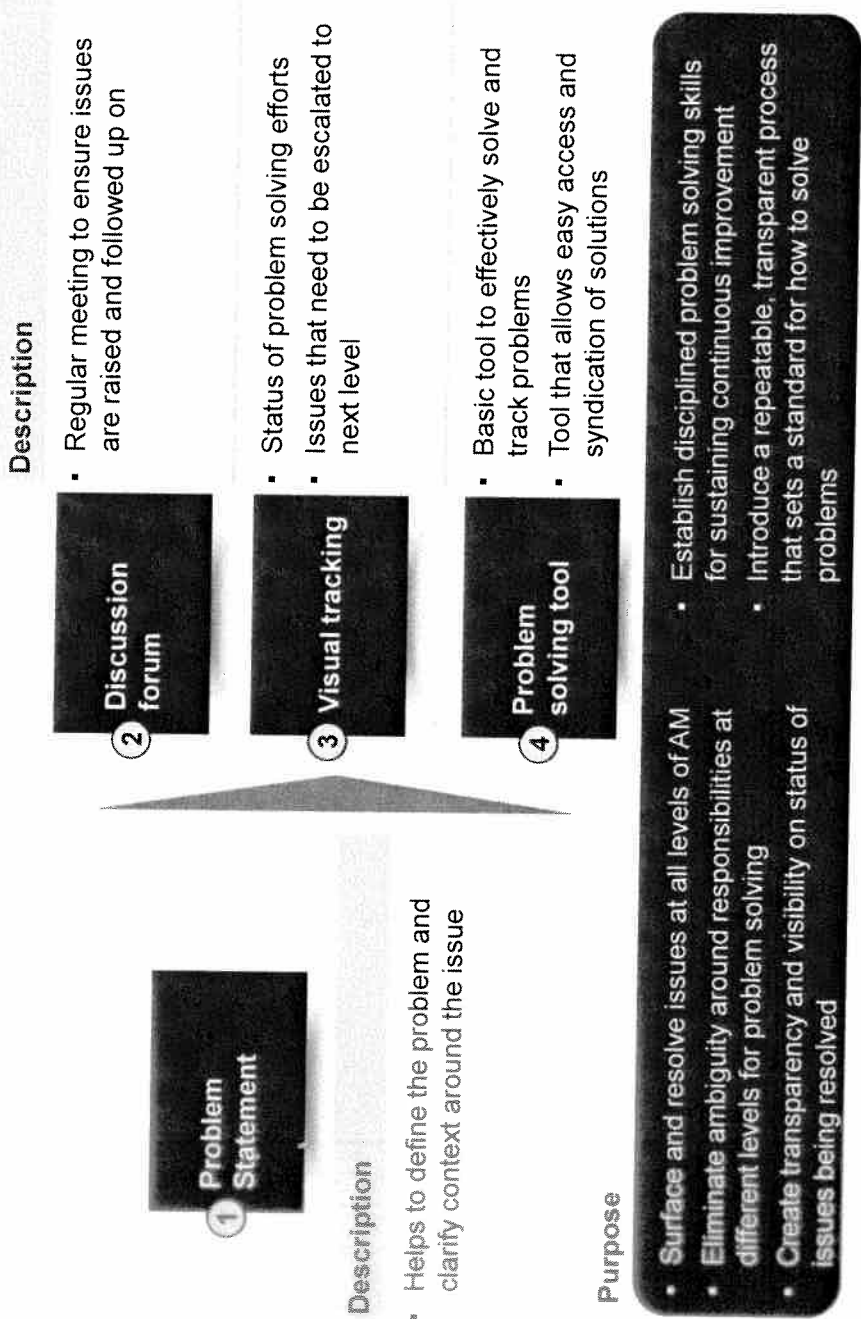
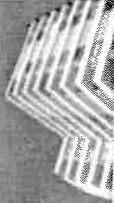
The Problem Solving System is part of a larger system aiming to embed continuous improvement in AM



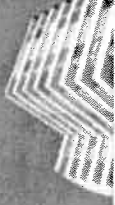
The key to solve problems sustainably is identifying and fixing the root cause



A Problem Solving System based on 4 elements can help to identify and fix the root cause of a problem



1 Problem Statement for AM



Purpose: Helps to define the problem and clarify context around the issue

- ① What is the problem?
(Describe in 1 sentence)
- ② Who identified this problem?
(Your name – not mandatory)
- ③ Who is the team lead for solving this problem?
(Your name or determined in Problem Solving Huddle)
- ④ Who are additional team members?
(Determined in Problem Solving Huddle, suggested min. 1 additional team member)

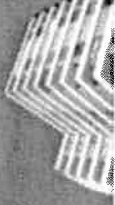
①

②

③

④

2 Discussion Forum



Purpose: Regular meeting to ensure issues are raised and followed up on



- **Issues identified**
 - Huddles
 - Personal reflection
 - Management reports
 - Metrics/goals
- **Issues captured on post-its on the team's Problem Solving Board**
- **Issues raised by**
 - AM PMs
 - AM Supervisors
 - Operations
- **Bi-monthly Problem Solving Huddles for PMs and Supervisors in one location to**
 - Prioritize problems and select those that should be pursued next
 - Assign ownership
 - Voluntary ownership for a problem that individual selected him/herself
 - Team majority decides on issue and nominates owner(s)
 - Check-in on progress of problem solving
- **Problem Solving Meetings on Hub level to**
 - Provide an overview of progress made around problem solving
 - Present problem proposals that require input or authorization from Hub Leadership and/or Supervisors

Owners of problems will schedule their own problem solving meetings when and where needed

2 Problem Solving Huddle Agenda



How will Problem Solving Huddles work?

- **Who will lead the Huddle?**
 - Rotating Huddle leadership across PMs
 - Supervisors to kick off Huddle in rotating responsibility (if more than 1 Supervisor in one location)
 - Huddle leader to facilitate agenda drawing onto owners of problem
- **Who will attend the Huddles?**
 - All AM PMs, Supervisors, PAs in one location (required)
 - Operations, Production (optional)
- **When will Huddle meetings happen?**
 - Bi-monthly, separately from Team Huddles
- **Where are Huddles held?**
 - Standing in front of the joint Problem Solving Board
- **How long will the Huddle meetings be?**
 - Approx. 20 min
- **What are the key goals of the Huddle?**
 - Provide overview of new problems identified in past 2 weeks
 - Prioritize new problems based on team consensus taking earlier identified problems into consideration
 - Assign ownership
 - Progress update
 - Celebrate and recognize successes

Time

Topic

2 - 3 min **Celebration of successes and achievements on problems solved**

2 - 3 min **Overview of problems identified in the past 2 weeks**
Provide overview of new problems identified in past 2 weeks

7 min **Prioritization of new problems**
Prioritize new problems to agree on these to be added to pipeline; assign ownership

5 - 8 min **Status update of problems in the progress**
Check-in on progress of problems in the pipeline

2 min **Key next steps**
Recapture main point/agreements made in huddle

~ 20 mins Total time (bi-monthly)

2 Problem Solving Huddle Pledge

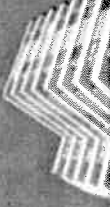


All Problem Solving huddle participants will be asked to commit to the pledge

- I pledge to arrive at problem solving huddles on time and devote my full attention to the huddle while I am there
- I pledge to listen and participate in the Problem Solving Huddle with an open mind
- I pledge to respect and be courteous to each Problem Solving Huddle member
- I pledge to refrain from embarrassing Problem Solving Huddle Team members
- I pledge to refrain from making the Problem Solving Huddle a gripe session
- I pledge to be supportive of decisions made by the Team
- I pledge to step up and take ownership of a problem, where possible
- I pledge to keep problems on the board unless the team agrees to remove them
- I pledge to attend the huddles unless I am not in the office or have an unavoidable conflict – in the event of the conflict, I pledge to let the huddle leader know in advance that I cannot attend

Joe W. [unclear]
John [unclear]
John [unclear]
John [unclear]
John [unclear]

2 Problem Solving Meeting Agenda (Hub Level)



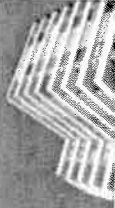
| How will Problem Solving Meeting on Hub level? |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> ▪ Who will lead the meeting? <ul style="list-style-type: none"> - Combination of Supervisor(s) and PMs ▪ Who will attend the Meeting? <ul style="list-style-type: none"> - AM Supervisors across Hub - Hub Leadership - 1 - 2 AM PM representatives (nominated in Huddle for each meeting) - Production Supervisors (optional) - 1 - 2 Operation representatives ▪ When will Huddle meetings happen? <ul style="list-style-type: none"> - Monthly right before Management Huddles ▪ Where are Huddles held? <ul style="list-style-type: none"> - Conference room and/or call ▪ How long will the Huddle meetings be? <ul style="list-style-type: none"> - Depends on # of problems yet not more than 1 hour ▪ What are the key goals of the Huddle meetings? <ul style="list-style-type: none"> - Provide overview of problem solving status per location - Discuss problem solving proposal brought forward to meeting - Celebrate and recognize successes |

| Time | Topic |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 15 min | <p>Problem solving status per location and celebrate successes Each supervisor provides overview of problem solving progress in their location sharing a brief overview of</p> <ul style="list-style-type: none"> ▪ Problems identified ▪ Problem solved ▪ Problems worked on <p>Recognize PMs with specific achievements and contribution to problem solving</p> |
| 40 min | <p>Team problem solving Discuss and problem solve individual problem solving cases brought forward to the meeting and represented by PM representatives Requirement: problem solving proposal is developed as basis for discussion</p> |
| 5 min | <p>Recapture next steps coming out of the meeting</p> |
| ~ 60 mins | <p>Total time (per month)</p> |

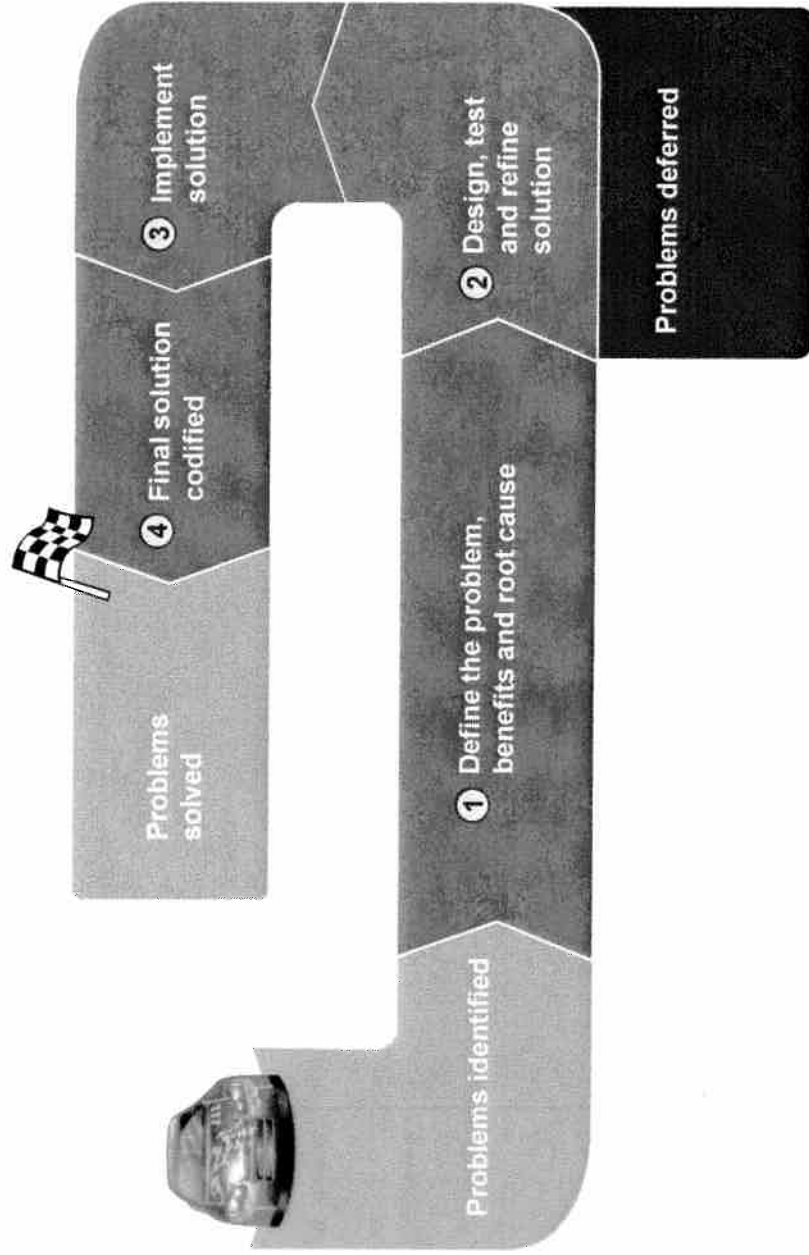
How

\$

3 Visual Tracking



Purpose: Show status of problem solving efforts and issues that need to be escalated to next level



4 Problem Solving Tool: Problem Solving Template (1/2)



| Issue name | Owner | Open date | Close date | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------|--|--|--|--|--|--|----------------------------------------|
| <p>① Problem statement (identify problem and reason for improvement)</p> <p style="text-align: right;">Due:</p> | <p>① Expected benefits (how will this effort benefit you/your team/your organization/your customer)</p> <p style="text-align: right;">Due:</p> | <p>① Team members</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Name</th> <th style="width: 20%;">Role</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </tbody> </table> | Name | Role | | | | | | | <p style="text-align: right;">Due:</p> |
| Name | Role | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| <p>① Root causes of the problem (identify and validate root cause of the problem)</p> <p style="text-align: right;">Due:</p> | <p>② Proposed solution design (identify, evaluate, and select potential solutions to test effectiveness)</p> | <p style="text-align: right;">Due:</p> | | | | | | | | | |

4 Problem Solving Tool: Problem Solving Template (2/2)



| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| <p>③ Implement solution (Implementation plan)</p> | <p>Task</p> <p style="text-align: center;">Owner</p> <p style="text-align: right;">Due</p> |
| <p>④ Final solution codified (Be sure to use the Standard-Work Statement format and include key words that allow people to find the information)</p> <p style="text-align: right;">Due:</p> | <p>⑤ Comments</p> |

4 Problem Solving Tool: Problem Solving Template – electronic version (1/2)



EXAMPLE

Overview page -- summary of problems in the pipeline

San Francisco Multifamily Fund > Problem Solving Systems

Problem Solving System

| Issue Name | Owner | Status | Open Date | Last Modified | Modified By | ID |
|----------------------------------------------------------------------------------------------|--------------------|-------------|-----------|-------------------|-----------------|----|
| Owner : Baptista, Monica S (1) Time Consuming Service Coordinator Grant Monitoring | Baptista, Monica S | Not started | 2/8/2012 | 2/9/2012 10:44 AM | Boden, Robert G | 3 |
| Owner : Boden, Robert G (1) | | | | | | |
| Owner : Lee, Gary (1) | | | | | | |
| Owner : Mezey, Susan S (1) | | | | | | |

I spend too much time filing, going into LOCs, reviewing vouchers, reassigning funds, when the vast majority of our grantees are solid performers.

4 Problem Solving Tool: Problem Solving Template – electronic version (2/2)



EXAMPLE

Entry page – problem solving template by individual problem

Root Causes of Problems

Proposed Solutions

Implementation Plan

Sustain Improvement

Description of Implemented Solution

Basic Profile

Name

Owner

Open Date

Close Date

Status

Problem Statement

Expected Benefits

Team Members

Identify problem and reason for improvement.

How will this effort benefit you/your team/your organization/your customer?

Enter users separated with semicolons.

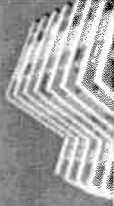
Identify and validate root cause of the problem

Identify, evaluate, and select potential solutions to test effectiveness

The solution will likely require several steps and tasks. List each task, including the owner and due date of each task.

Assure problem does not recur

4 Developing Standard-Work Statements from the results of the problem solving process



Purpose: Standardizing solutions to enable the syndication of knowledge and best practice solutions across tenure and geographies

Creating standards out of problems solved successfully has multiple benefits

- Promotes higher quality work and reduces risks
- Improves the productivity and efficiency of individuals
- Owners receive a timely and accurate response to their requests

Solution standards need to be captured in a consistent manner. A standard-work statement as part of the electronic Problem Solving Template captures the main steps of an approach to solve a problem. The statement outlines:

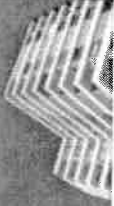
- Major steps and notes on best practices
- Sequence of steps
- If possible, estimated time for each step

Example of Standard Work for Production - A&E: 221(d)(4) pre-applications

Steps to perform

1. Review lender's narrative and basic work write-up
2. Examine A&E exhibits
 - a. Sketch plans
 - b. HUD Form 2013
3. Visit and assess site or current buildings (if applicable)
4. Review bottom-line cost data
5. Issue written report, for Appendices 5L.1 and 6A.1 to team leader, and email project team

**4 Production example for Standard Work – A&E:
221(d)(4) firm application**



| Major steps and notes on best practices | Steps to perform |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | 1. Review lender's narrative and detailed work write-up (if sub rehab) |
| | 2. Examine Review Report and A&E exhibits |
| | a. Site work, soils information, survey, and surveyor's report |
| | b. Accessibility (FHA/HUD requirements) |
| | c. Plans and specs |
| | d. Utility and offsite analysis (if required) |
| | e. HUD Forms 2264 and 2013 |
| | 3. Visit and assess site and current buildings (if applicable) |
| | 4. Compare lender's estimate and contractor's HUD Form 2328 with HUD cost data |
| | 5. Complete HUD Form 2264 |
| | 6. Complete property-insurance schedule (verify at closing) |
| Possible: estimated time for each step | 7. Sign original copies of HUD Form 2328, route to supervisors for approval, issue written report and forward Appendices 5L.2 and 6A.2 to team leader, and email HUD Form 2264 with A&E cost portions completed to project team |

4 Syndicating Standards across AM



Purpose: Syndication of knowledge and best practice solutions across tenure and geographies to reduce duplications, inefficiencies, fill skill and knowledge gaps and create greater consistency

Archiving content

- Electronic standard-work template captures in a precise and concrete manner the steps of the final solution
- Standard-work automatically populates searchable database
- Solutions resulting in SOPs are also copied by Hub resources directory manager into appropriate subject matter index
- Ideally this would be part of an HQ-based, nation-wide resources management function

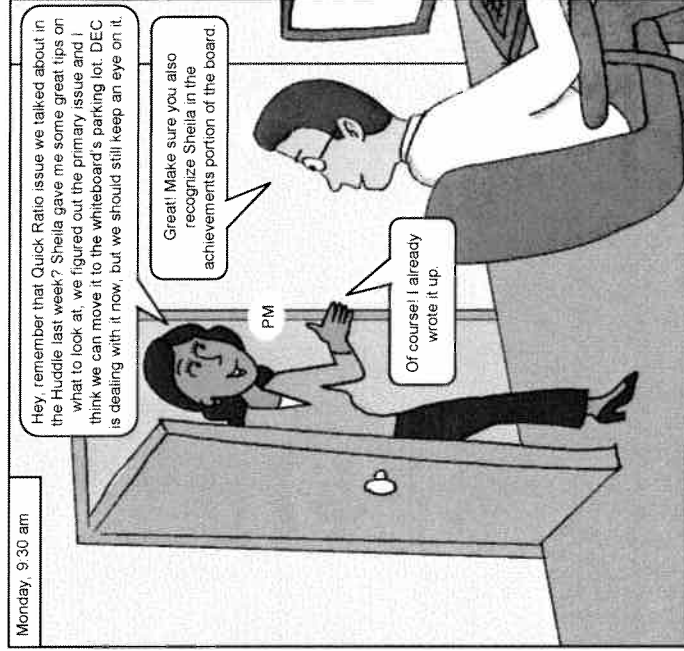
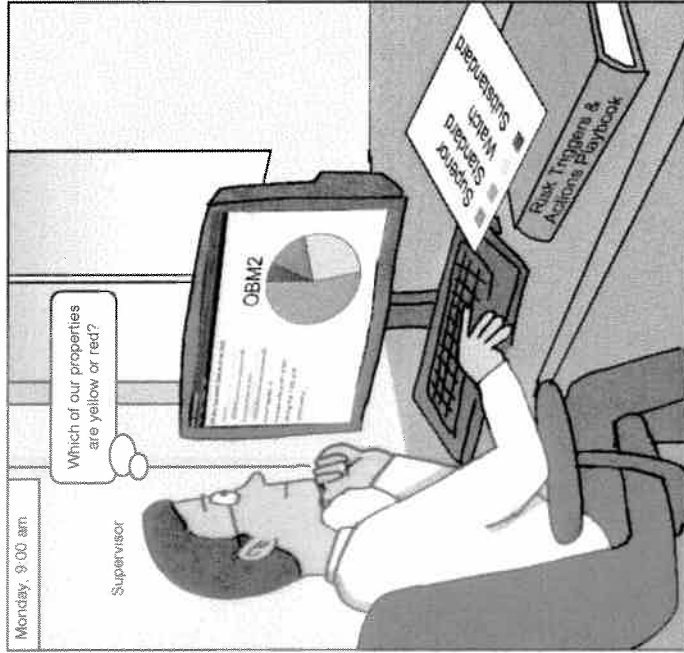
Ensuring Hub-wide outreach

- Monthly peer-to-peer, Hub-wide, PM conference calls scheduled for 1:30 pm the first Wednesday of each month
- All PMs should attend but at least one member of each team is required to attend
- Each team either
 - Reports on problems solved
 - Share up to 2 problems in need of solutions or support
- Similar to huddles, chair rotates. Rotate secretarial duties.
- Provide brief minutes packet to supervisors and head of AM; load minutes into SharePoint

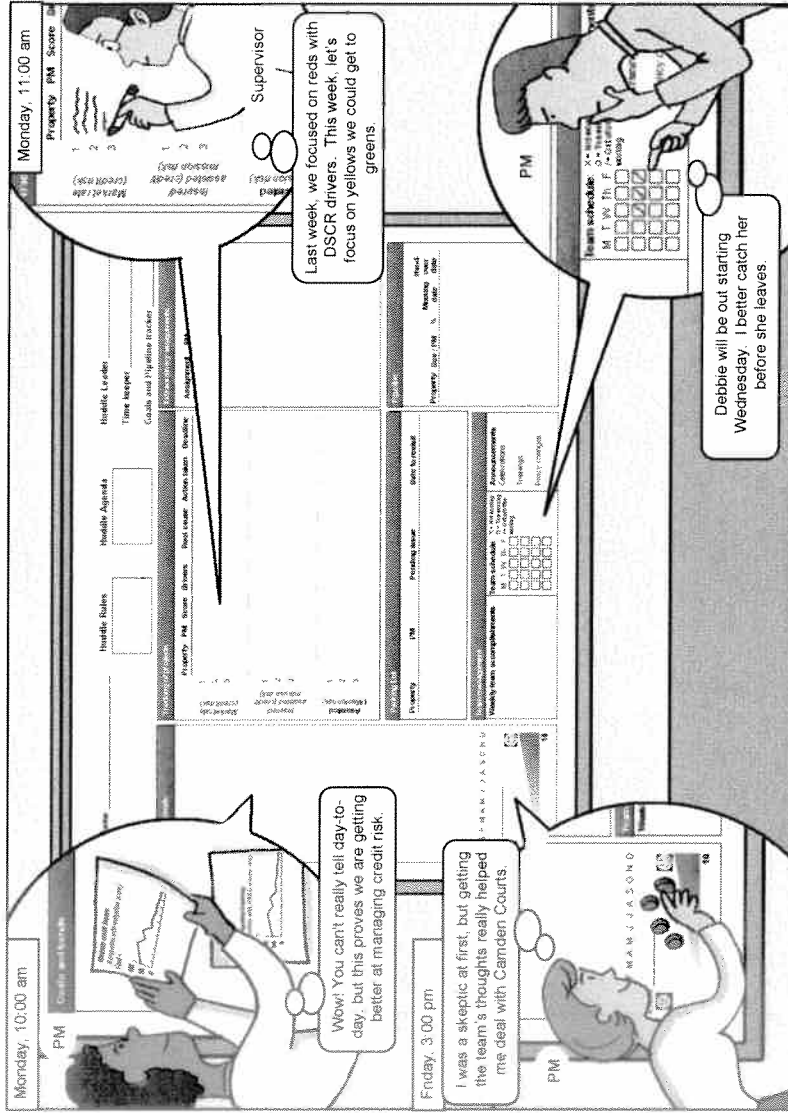


- **Overview of *Sustaining our Investments* frontline transformation**
 - Additional details on components
 - **Selected communication materials: cartoon and videos**
- Rollout waves & approach (incl. “Hub and spoke” model)
- 8-week Hub implementation overview (incl. capability building program)
- Program Management Office (PMO): roles and responsibilities

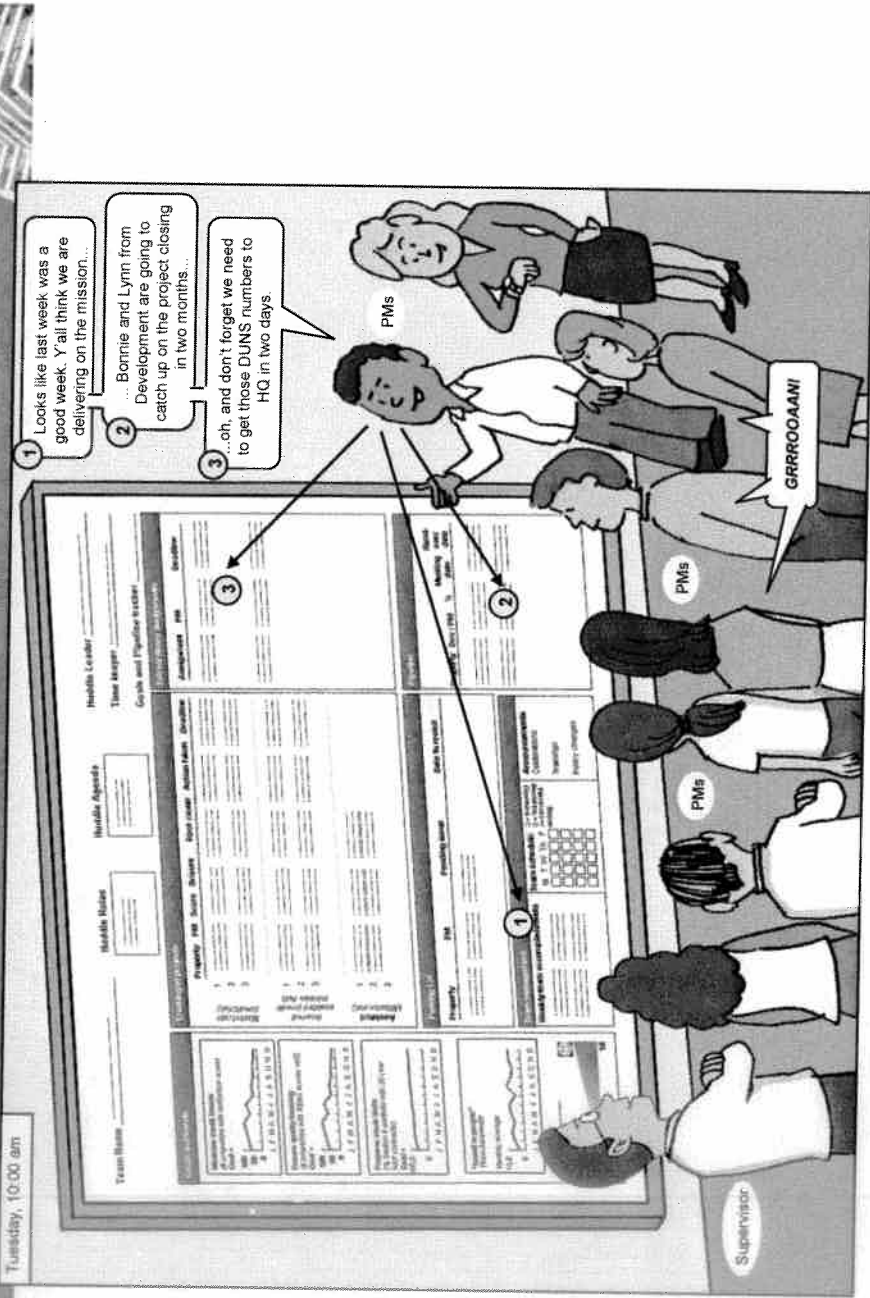
Chapter 1: How does it all begin?



Chapter 1: How does it all begin?



Chapter 2: The team comes together in the weekly 'huddle'



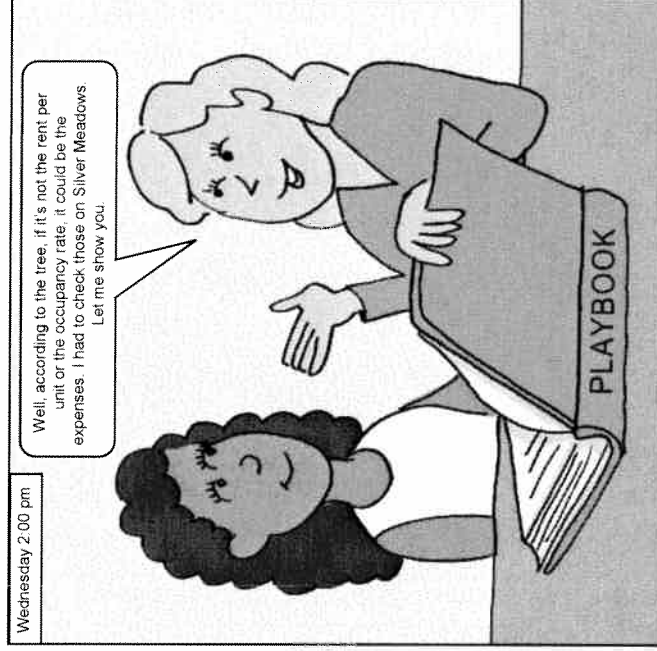
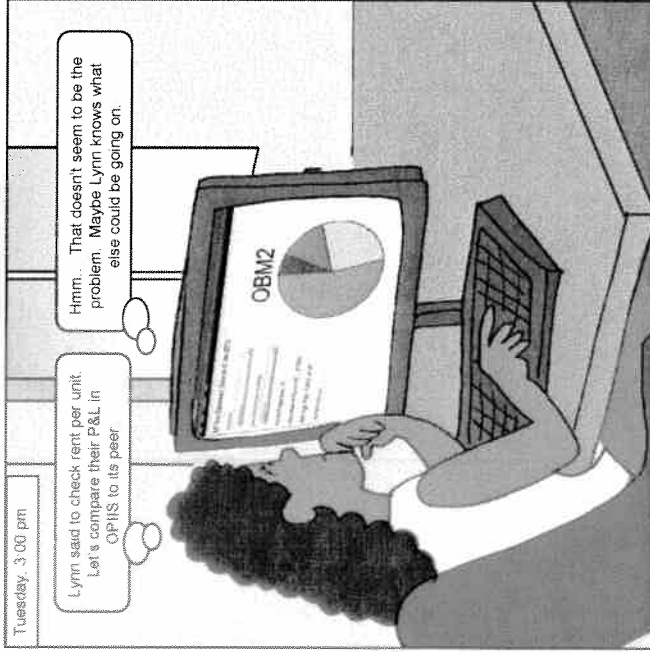
Chapter 3: The team focuses on projects at risk ...

Tuesday, 10:08 am



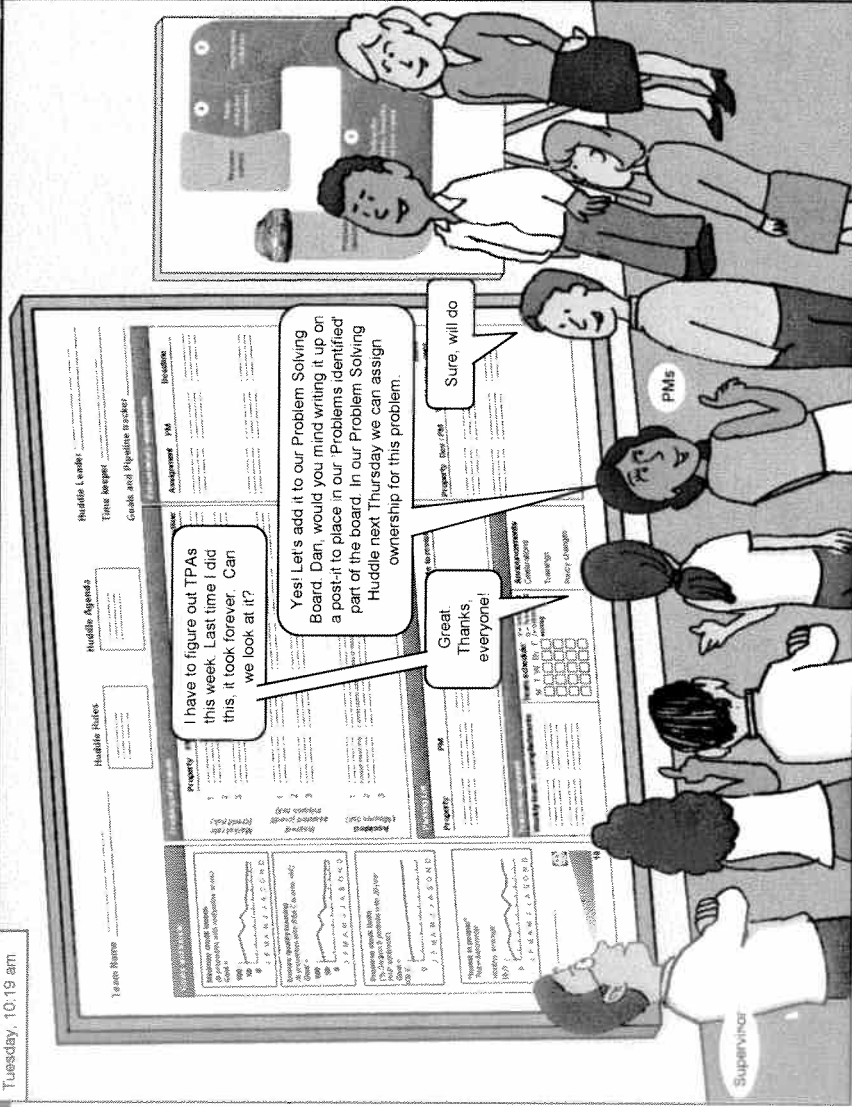
Chapter 3: ... and takes swift action on these projects!

With project management by risk, PMs no longer have to do 100% on all activities. They can focus their time on the yellows and the reds...

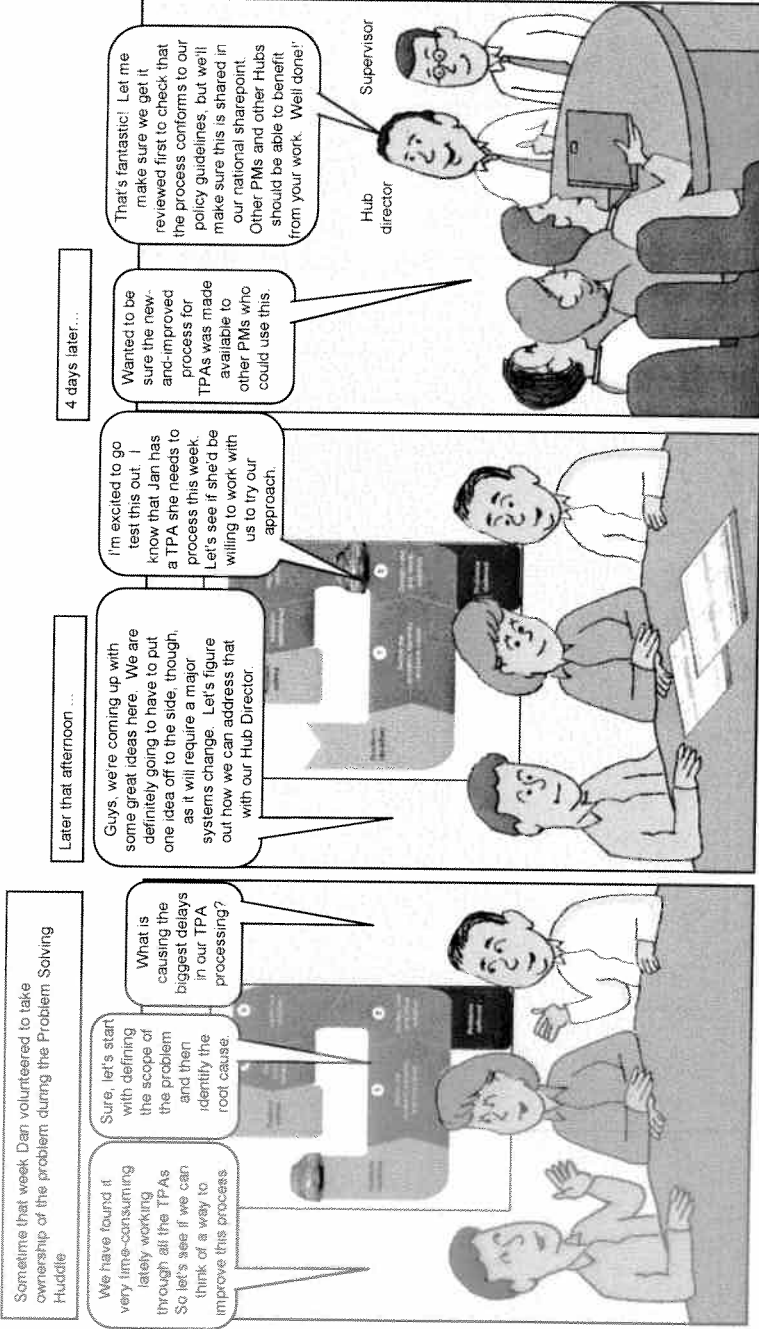


Chapter 4: Sometimes other problems come up that need to be addressed ...

Tuesday, 10:19 am

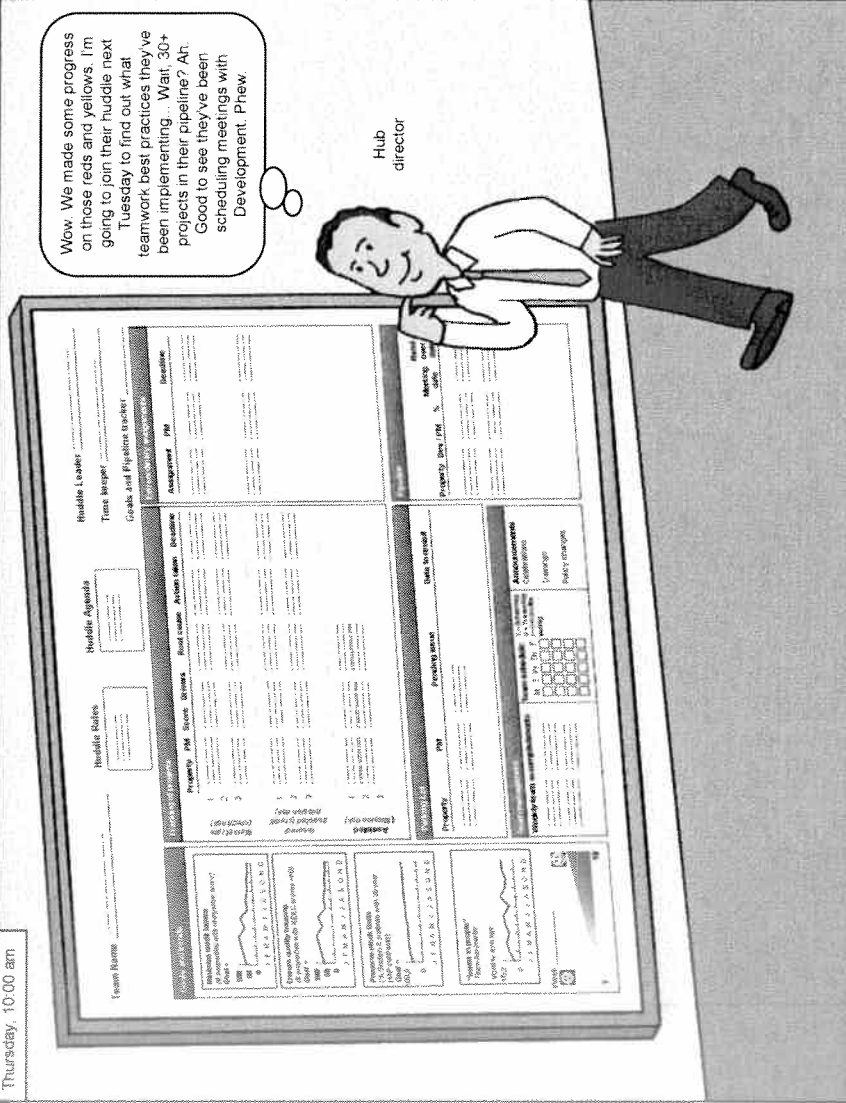


Chapter 4: ... so they can be added to the problem solving system and the team can come up with solutions!



Chapter 5: The whiteboards will create greater transparency across asset management teams

Thursday, 10:00 am



Chapter 6: Reporting back to the huddle, PMs know it has been a job well done

Tuesday, 9:58 am



Video clips will be available to show what the transformed interactions and approaches look like in practice



Clips of field interactions in pilot site will be available on an electronically accessible repository:

comprison.mp4



MAH00022.MP4



MAH00023.MP4



MAH00027.MP4



MAH00028.MP4



MAH00034.MP4



MAH00024.MP4



MAH00029.MP4



MAH00035.MP4



MAH00025.MP4



MAH00030.MP4



MAH00036.MP4



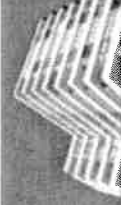
MAH00026.MP4



MAH00031.MP4



MAH00037.MP4

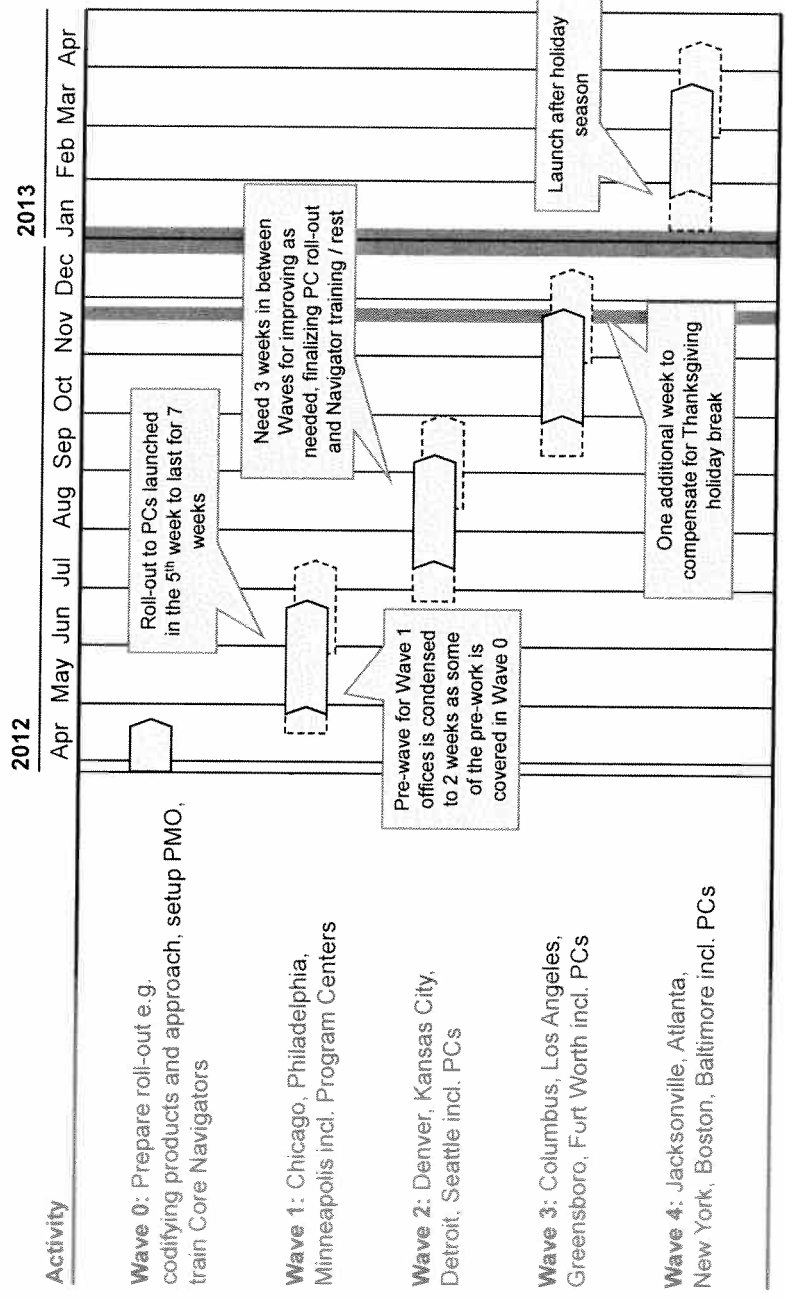


- Overview of *Sustaining our Investments* frontline transformation
- **Rollout waves & approach (incl. “Hub and spoke” model)**
- 8-week Hub implementation overview (incl. capability building program)
- Program Management Office (PMO): roles and responsibilities

Rollout begins in April 2012 and is scheduled to conclude in April 2013



PRELIMINARY



We will pursue the "Hub and spoke" model for the rollout

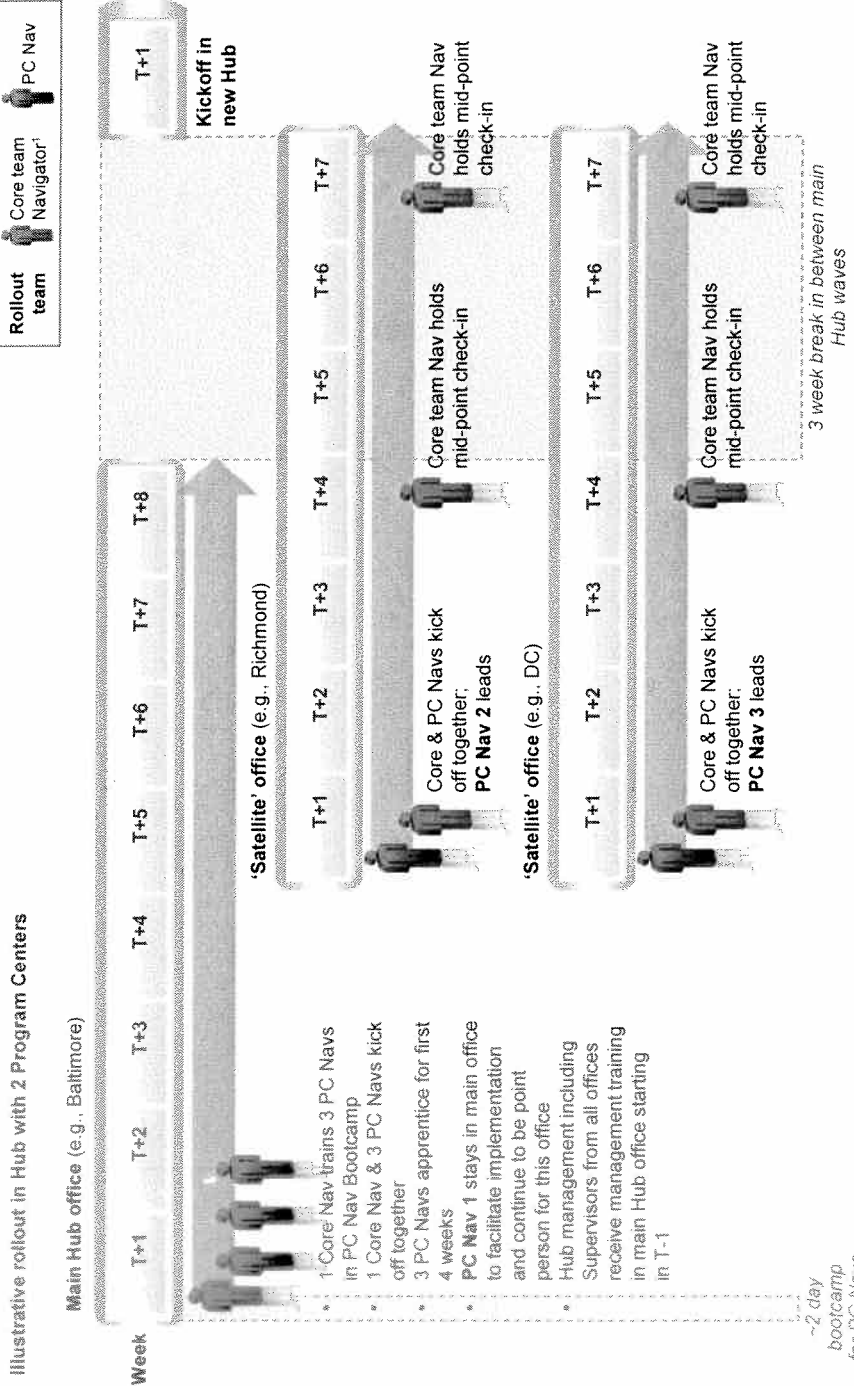
Detail follows

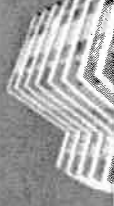


| Options | Description | Perspectives on option |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1</p> <p>Heavily leverages central resources</p> <p>"Full & focused" - Rollout to Hubs only</p> <p>Main Hub offices (17)</p> | <ul style="list-style-type: none"> Full program rolled out to all main Hub offices, starting with ~2 Hubs per wave and scaling to 5-6 Hubs per wave Large core team of Navigators will lead change programs at all locations, appointing 'change agents' to facilitate implementation Tools and resources available to all program centers External support: <ul style="list-style-type: none"> Co-manage rollout to Hubs in Waves 1 and 2 Provide training of Navigators Establish project management office (PMO) routines and tools Refine specific initiatives that require further work (e.g., standard work) | <ul style="list-style-type: none"> Ensures focus on main Hub offices and chances of success Requires significant resources from center Does not cover all offices, leading to divergent 'ways of working' across MF AM |
| <p>2</p> <p>Heavily leverages Field resources</p> <p>"Hub and spoke" - Rollout to every PC</p> <p>Main Hub offices (17)</p> <p>All 'satellite' offices (~55)</p> | <ul style="list-style-type: none"> Full program rolled out to all main Hub offices, starting with ~2 Hubs per wave and scaling to 5-6 Hubs per wave Each Hub provides Hub Navs to roll out program to additional 'satellite' offices (# of Hub Navs = total # of offices per Hub) Large core team of Navigators will help train the Hub Navs All tools and resources available to all program centers External support similar to option 1, but also helps to facilitate Hub Nav boot camp | <ul style="list-style-type: none"> Highest impact in terms of locations covered Requires significant resources from center, but leverages & involves the Field more actively |
| <p>3</p> <p>Heavily leverages Field resources</p> <p>"Train the trainer" - Field-led rollout</p> <p>All AM offices (rationally ~72)</p> | <ul style="list-style-type: none"> Leaner Core team Navigators will run 2-3 week Academy for Hub Navs Each office appoints a Hub Navigator to attend training Rollout will be owned by Hub Directors and Hub Navs, with coordination & support from core team External support: <ul style="list-style-type: none"> Setup remote support program Run the Academy & provide training Establish project management office routines and tools | <ul style="list-style-type: none"> Requires fewer resources from center More difficult to ensure consistency in the product being rolled out |

"Sustaining our Investments"

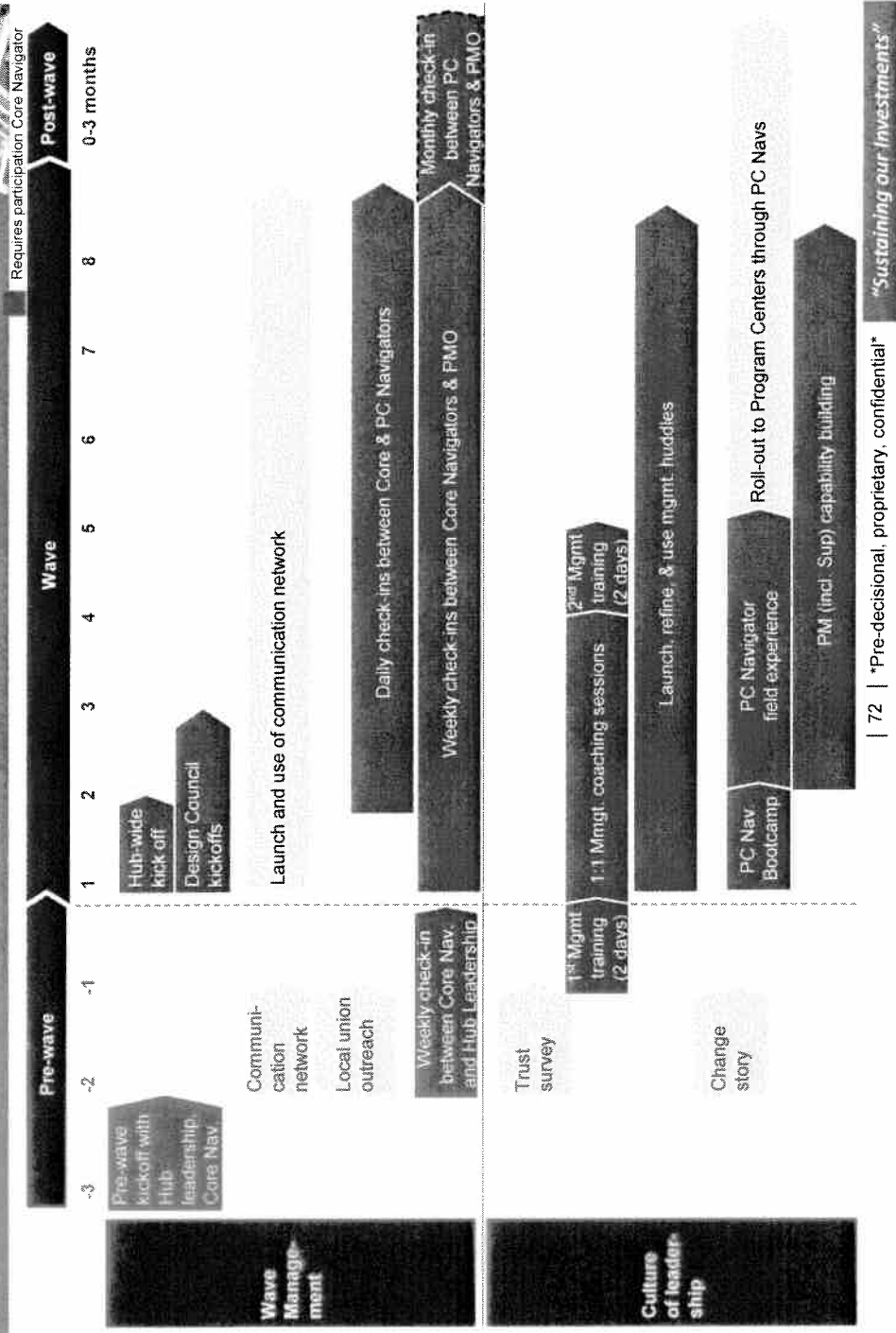
In this approach we will train Program Center Navigators that will rollout the change into their Program Centers





- Overview of *Sustaining our Investments* frontline transformation
- Rollout waves & approach (incl. “Hub and spoke” model)
- **8-week Hub implementation overview (incl. capability building program)**
- Program Management Office (PMO): roles and responsibilities

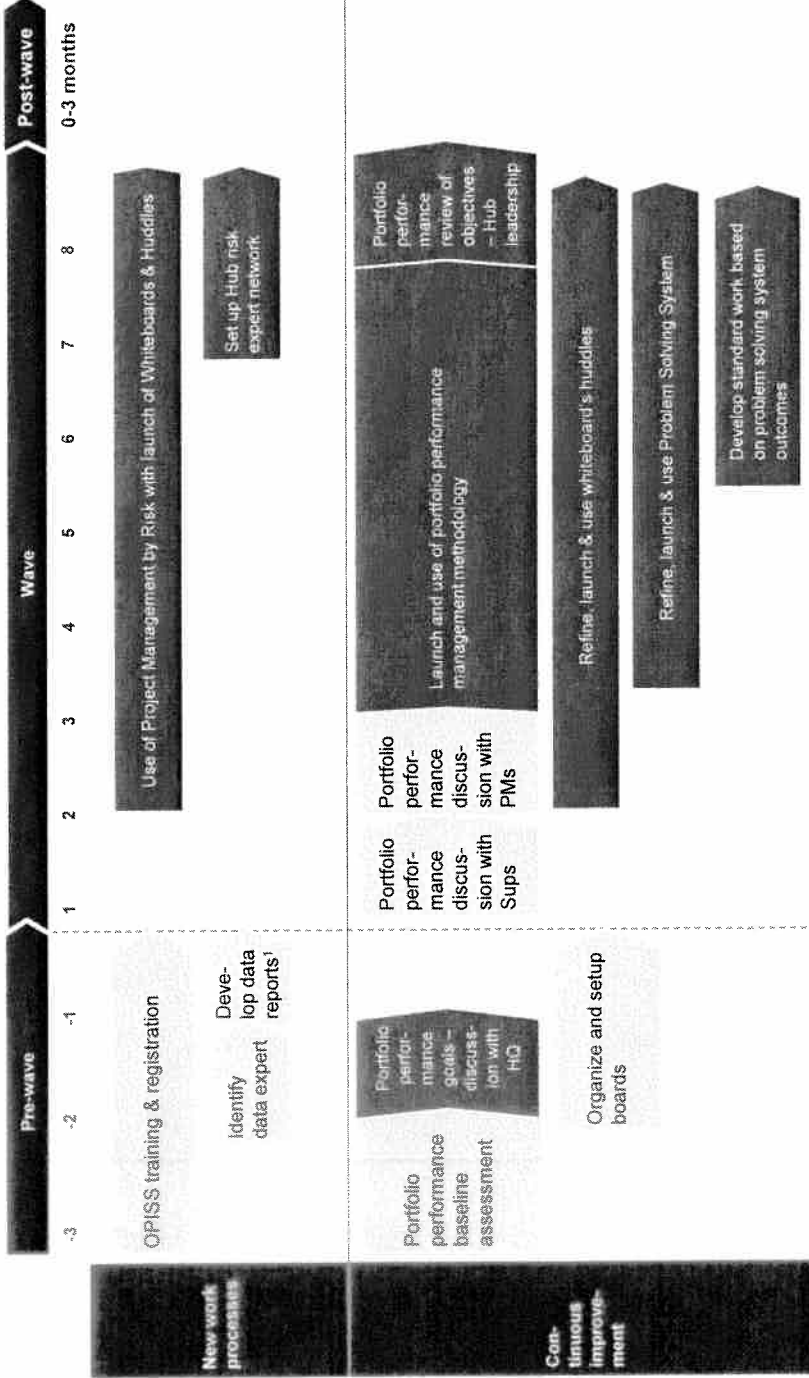
Sustaining our Investments will require 3+8 weeks of implementation to ensure the changes "stick", with clear objectives for each (1/2)



Sustaining our Investments will require 3+8 weeks of implementation to ensure the changes "stick", with clear objectives for each (2/2)



Requires participation Core Navigator



1 If needed

| 73 | *Pre-decisional, proprietary, confidential*

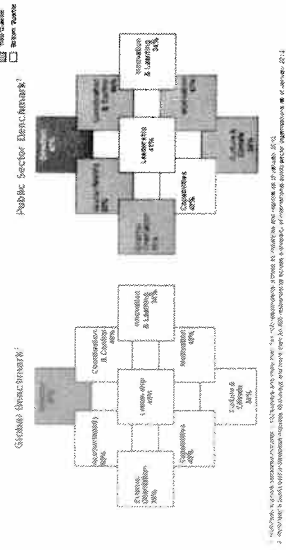
"Sustaining our Investments"

Diagnostic findings show the significant need for capabilities in three areas – substantial for the sustainable success of MF AM

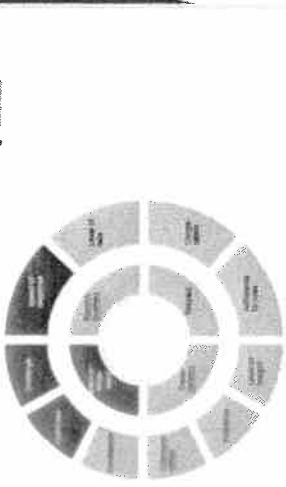


Health diagnostic outcomes

Average percent of employees indicating "strongly agree" and "agree"



Legend:
 ■ Strongly Agree
 ■ Agree
 ■ Disagree
 ■ Strongly Disagree



Proposed skills for MF AM Organization

- 1 Continuous improvement skills such as problem solving, creation of standard work, feedback, facilitation
- 2 Leadership skills such as building trust, difficult conversations, coaching, change management
- 3 Risk Management and Mitigation skills



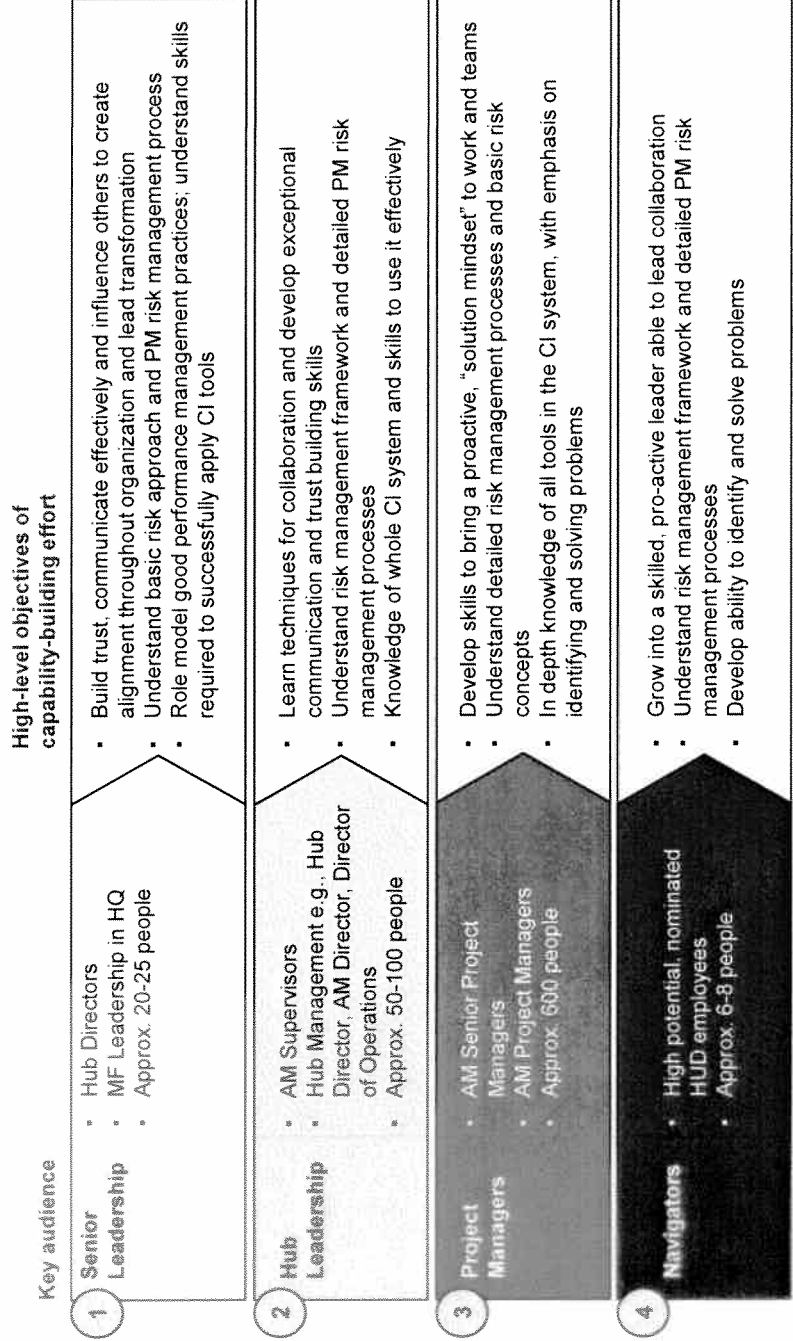
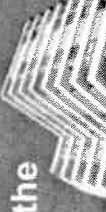
Capability-building related diagnostic results – key highlights for MF AM

- Inability of MF AM to continuously improve itself**
- No active documentation of knowledge and ideas
 - Documented lack of training and coaching to develop internal skills
 - Inability to tap into the vast knowledge pool at the hub and field-office level
 - Inability to create bottom-up innovation
 - No renewal and updating of training effort to reflect latest knowledge

- Significant leadership skill gap across the organization**
- Significant gap in leadership skills across the organization driven by a sole focus on authoritative leadership style

- Lack of an active risk management and mitigation system**
- Lack of learning from mistakes
 - No skills to challenge each other and more senior folks
 - No active coaching and feedback from leadership

Capability building as part of Sustaining our Investments addresses the entire organization along these skills



The full set of training modules with instructions are available to be used during rollout as part of these learning journeys

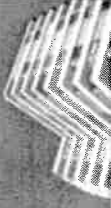


| Audience | Module | Week in 3+8 wave rollout | Length |
|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Core Navs ¹ | <p>Core Nav Bootcamp: change leadership overview, process management, CI and PMR tools, facilitation and motivation, self mastery</p> <p>Core Nav field training: deepen "train the trainer", problem solving, and coaching skills</p> <p>Core Nav Self Mastery refresher: deepen self mastery based on field experience</p> | <p>Before Wave 1</p> <p>Before Wave 1</p> <p>Week 3, Wave 1</p> | <p>4 days</p> <p>1-3 hrs / day for 1 wk</p> <p>4 hours</p> |
| Hub Leadership (directors and supervisors) Only | <p>Hub Leadership pre-wave prep: high level view of Sustaining our Investments story, what to expect with the wave, high level plan for portfolio analysis</p> <p>Hub Leadership Forum #1: difficult conversations, manager vs. leader, adult learning, trust, coaching and feedback</p> <p>Hub Leadership Forum #2: feedback, team norms, team charter, CI leadership, facilitation, influencing</p> | <p>Week -3</p> <p>Week -1</p> <p>Week 4</p> | <p>4 hours</p> <p>2 days</p> <p>2 days</p> |
| PC Navs Only | <p>PC Nav Bootcamp: change leadership overview, Sustaining our Investments story, process management, facilitation and motivation, work planning</p> <p>PC Nav field training: deepen problem solving skills (wk2), R-TAP action plans (wk3)</p> <p>PC Nav Work Planning Workshop: detailed process mgmt skills for PC rollout</p> | <p>Week 1</p> <p>Week 2 and 3</p> <p>Week 4</p> | <p>2 days</p> <p>3 hours, wks 2+3</p> <p>3 hours</p> |
| Project Managers, Supervisors and PC Navs | <p>PM Forum #1: Introduction to the initiative, overview of continuous improvement, RTAP, and PMR</p> <p>PM Forum #2: Whiteboards, Huddles, deep dive on R-TAP issue trees, Giving / receiving feedback</p> | <p>Week 1</p> <p>Week 3</p> | <p>4 hours</p> <p>3 hours</p> |
| Project Managers and Supervisors Only | <p>OPIIS Training: Introduction to OPIIS</p> <p>Risk Field Work #1: Using RTAP to prioritize work</p> <p>Risk Field Work #2: Using issue trees to identify root causes</p> <p>Risk Field Work #3: Using action plans to resolve problems</p> <p>PM Forum #3: Problem-solving infrastructure and RTAP action plans</p> <p>PM Forum #4: Risk capstone discussion with R-TAP review and case presentations</p> <p>PM Forum #5: Townhall to review core concepts being CI and PMR, what happens next</p> | <p>Week -2</p> <p>Week 2</p> <p>Week 4</p> <p>Week 6</p> <p>Week 5</p> <p>Week 7</p> <p>Week 8</p> | <p>2 hours</p> <p>2 hours</p> <p>3 hours</p> <p>3 hours</p> <p>6 hours</p> <p>3 hours</p> <p>3 hours</p> |

¹ Core Navigators will also work in tandem with McKinsey team in Wave 1 for full apprenticeship on all modules delivered to frontline, hub leaders and PC navs in a Wave.

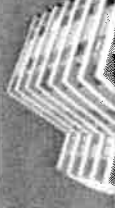


The full set of training modules with instructions are available to be used during rollout as part of these learning journeys



Training time commitment week by week in the hub office rollout. Beginning at T+5 the PC Navigators will be back in their offices beginning their rollout.

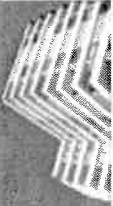
| Audience | T-3 | T-2 | T-1 | T+1 | T+2 | T+3 | T+4 | T+5 | T+6 | T+7 | T+8 |
|-------------------------------------------------|---------|---------|--------|---------|---------|---------|---------|---------|---------|---------|---------|
| Hub Leadership (directors and supervisors) Only | 4 hours | | 2 days | | | | 2 days | | | | |
| PC Navs Only | | | | 2 days | 3 hours | 3 hours | 3 hours | | | | |
| Project Managers, Supervisors and PC Navs | | | | 4 hours | | 3 hours | | | | | |
| Project Managers and Supervisors Only | | 2 hours | | | 2 hours | | 3 hours | 6 hours | 3 hours | 3 hours | 3 hours |



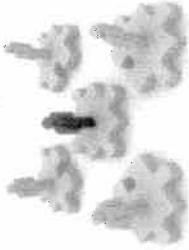
- Overview of *Sustaining our Investments* frontline transformation
- Rollout waves & approach (incl. “Hub and spoke” model)
- 8-week Hub implementation overview (incl. capability building program)

▪ **Program Management Office (PMO): roles and responsibilities**

The national Project Management Office (PMO) will be responsible to manage the frontline transformation and additional initiatives



Role description



- The national Project Management Office (PMO) is the organization under which all the resources sit; it acts as an engine of change for Sustaining our Initiative
- The PMO is run by the project manager and supported by the Core Team members
- The project management team meets regularly and oversees the portfolio of initiatives, rollout, communication and communication tools (e.g., pulse survey, initiative tools and training, certification program, performance tracking) and the performance management process (dialogues and dashboard)

Reporting structure

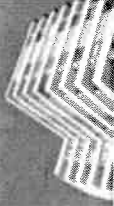


- The PMO should report to a leadership steering committee guiding the transformation
- A mix of key senior stakeholders is critical to the success of the transformation (push for single-point accountability by aligning on a chair or final decision maker)

Location



- The location of the team should be a hub and spoke model
- Some initiatives require a centralized approach, while others require proximity to the field offices
- Central PMO members should stay connected to the field by spending time in the offices. The central location can be used to spot content linkages and the spokes to liaise effectively with the line



The organization of the PMO will be incorporated by geography and it interfaces with other stakeholders

