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Efficacy of collaborative consulting training module

Brenda Stone

EFFICACY OF COLLABORATIVE CONSULTING TRAINING MODULE

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Brenda Stone

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BRENDA STONE

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Faculty Committee

Committee Chair, Miriam Y. Lacey, PhD

Committee Member, Kent Rhodes, PhD

David M. Smith, Ph.D., Dean
The George L. Graziadio
School of Business and Management

Abstract

Code for America Fellowships pair technologists with local city governments to develop digital tools that support how governments provide service to their communities. The lack of project sustainability following these Fellowships has been a source of dissatisfaction for both Fellows and clients. Code for America supports each Fellow with technical training, but provides no training on consulting techniques that help clients sustain the changes or new technology being introduced. The purpose of this action research study was to determine the efficacy of a collaborative consultation module for the Fellows at Code for America. To gather data, surveys, interviews and analysis of Fellow and client project satisfaction were conducted. Findings will inform improvements to future consultation skills training and identify activities or approaches that can enhance project sustainability.

Keywords: consulting, collaborative consulting, project sustainability, training efficacy

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Chapter 1: Introduction

In an era where a few keystrokes on a computer or smartphone can complete a job application, loan money, or even get freshly baked cookies delivered to your doorstep, many are surprised to find that critical daily transactions like enrolling for food stamps or signing up for state-sponsored healthcare would mean waiting in long lines or enduring lengthy paper-based processes. Government has been slow to adopt digital forms of communication now ubiquitous in service-oriented industries. The lack of adoption of new technologies keeps local governments from improving response time and reduces the ability of constituents to keep up with the needs of today's communities.

Code for America (CfA) is a non-partisan, nonprofit organization that started in 2009 with a mission to help government leverage technology in ways to improve delivery of its services to those most reliant on government support. "Making government work for the people, by the people, in the 21st century" (America, 2017) is the vision for the organization. Over the past six years, the organization has grown to become a $10M organization (Internal Revenue Service, 2015), with 40 regular staff members and up to 20 Fellows annually (Stone, 2016). The organization serves as a locus for the civic technology community by hosting an annual conference (the Summit), helping launch volunteer hack-nights across the country (the Brigades), engaging crowd-based development and deployment of software prototypes (the Civic Tech Issue Finder), and by creating a pipeline of civic technology talent through its cornerstone program, the Code for America Fellowships. CfA Fellowships are funded through government partner contributions of $250,000 and matched by grants from foundations. This funding supports a team of three Fellows, travel costs between the partner site and CfA San

Francisco headquarters, and program management including Fellow cohort selection, training and contract management. (America, 2017)

The CfA Fellowship Program connects technologists with local governments and over the course of 11 months, these technologists demonstrate that technology can be harnessed quickly, at reasonable cost, and with significant benefits to the communities the local governments serve. Now in its fifth year, over 30 city and county governments have been engaged, over 130 Fellows have participated (Neditch, 2016), and the overall satisfaction level of Fellows and government partners has been generally positive – averaging 3.7 or higher on a 5-point scale (Loveless & Neditch, 2016). However, exit and follow-up interviews with Fellows and government partners reveal areas for improvement: government partners are not able to sustain the projects after the program ends and the Fellows are dissatisfied by the level of impact they were able to achieve (Stone & Reilly, 2015).

At its core, the Fellowship Program is an organizational intervention where change agents, the Fellows, are inserted into local governments to promote the adoption of good technology practices. To be effective change agents, these Fellows must think beyond the creation of a technology product to consider the practices and processes that must also change with the government partners to allow for the adoption of the technology product. It may be that being an effective change agent, whose impact goes beyond the delivery of a product to helping an organization change its practices and processes, requires the knowledge and application of organization development principles such as understanding of the impacts of organizational culture and effective collaborative

consultation skills. These Fellowship projects are an intense, 11-month, test of both of these principles.

Code for America first prepares the Fellows to approach the project using similar technology development principles. The field of software development is diverse, with different contexts driving different ideal approaches. Because the Fellows themselves come from diverse industries – from large enterprise software developers to small start-ups – they do not all use the same programming languages, share the same project management techniques, nor have they had to address the user needs of a broad community user-base. Through a series of seminars, one-on-one coaching, and access to staff technical mentors, CfA provides Fellows with training on Agile software development principles (a project management method well suited for collaborative, rapid development software projects), training on user-centered design and assigns teams to ensure that each Fellowship team is comprised of an engineer, designer and user researcher.

Second, the Fellows themselves have little to no experience working in government, and so are unfamiliar with the norms, processes, and culture of their client group. Applicants for the Fellowship Program are technologists typically from for-profit technology firms started up within the last two decades, in a highly competitive industry driven by regular market feedback and constant innovation. Our average local government partners incorporated over a century ago, are the only service provider to their local market, act on feedback not from the "end user" or "customer" but from their administrative leadership – whether via statute or via elected official, and thrive on predictable processes and hierarchical control. These differences in strategic emphasis

(e.g., trying new things vs. efficiency/control) and criteria for success (e.g., winning in the marketplace vs. dependable service delivery), and organization maturity point to significant differences in overall organizational culture as described in Cameron and Quinn's (1999) Competing Values Framework. For the Fellows to affect a change in culture with their government partners, they must not only be able to appreciate the differences between organization cultures but also begin to address the practices at work that may run counter to the technology adoption they aim to achieve. To address this, the Fellows onboarding process includes seminars on topics including the basics of local government structure and hierarchy, terminology used in government that differ from the private sector, and stories of lessons learned from alumni Fellows as well as previous government partners.

To address the third major challenge, the need for Fellows to engage in effective collaborative consultation skills, CfA has provided some structural support, but minimal training. Fellowship projects are highly interactive engagements requiring collaboration with government partners to address a need and create a sustaining solution. As Block (1981) notes, the key to helping clients solve a problem so they "stay solved" is to approach the consulting relationship as a collaborative one, rather than one that is purely expert-based (Fellows would diagnose and implement a solution), or "pair-of-hands" based (Fellows would implement a solution based on client direction). To improve the potential sustainability of Fellow projects, CfA modified the initial contracting structure so that the scope and expectations for a finished product would be more realistically defined prior to the start of the program. The 2016 Fellows are the first to benefit from this change in contracting process. Outside of the improvements made in initial

contracting, however, CfA has not provided formal training or resources to the Fellows on the skills needed to be a successful consultant, nor to specifically approach the engagement as a collaborative consultant. To achieve a sustaining solution, Fellows must learn how to share and embed knowledge with their government partners so that government partners are both better prepared and motivated to adopt and maintain the technology after the conclusion of the Fellowship.

The field of civic technology is growing, and there are now more options for technologists seeking to find ways they can apply their skills to public service. While CfA focuses its work on local governments (city and county governments), two larger and federally-funded organizations have started in the past two years that have created more opportunities for technologists interested in applying their skills to public service. These two organizations are the Unites States Digital Service (focused on technology in Federal government and Federal agencies) and 18F (focused on leveraging technology in State governments). CfA must compete for qualified Fellowship applicants, sometimes against public-service options that do not require a pay-cut, so it must ensure and maintain high levels of program satisfaction and effectiveness not only from the perspective of the government partner, but from the individual Fellows as well.

CfA's cornerstone program, its Fellowship, prepares technical talent to work with local government by enhancing their user-centered software development skills and by guiding their acculturation to working with government. To enhance program satisfaction levels, CfA must find ways to help ensure that the short-term outcomes of the Fellowships are sustained. One way for improved sustainability of a consulting

engagement is for Fellows to approach the engagement using a collaborative consulting approach.

The purpose of this action research study is to determine the efficacy of a collaborative consultation module for the Fellows at Code for America. There are three phases to this study:

1. Develop a collaborative consultation module and pilot it with the Fellows

2. Collect data to determine its efficacy and make improvements needed

3. Implement as part of the formal training and development of future Fellows.

Chapter 2: Literature Search

The purpose of this chapter is to present literature on ways short-term consultants can affect sustaining technology adoption in a public institution, and best practices to inform the training design to prepare consultants for this undertaking. It is composed of three subsections, presented in the following order:

1) *Technology adoption in the public sector.* What research has been conducted on the barriers and enablers impacting adoption of technology in the public sector? What should change agents working with the public sector consider as they seek to implement technology that may impact workflows, processes, or even individual job functions?

2) *Consulting that leads to sustained results.* What research has been conducted on how consultants ensure their engagements lead to implementation and lasting adoption? What best practices have consultants identified when it comes to effectively working with the public sector? With technology adoption in particular?

3) *Effective training for consultants*. What training design leads to effective knowledge transfer and encourages application of the skills learned? What research is available on the preparation of consultants engaging with diverse clients?

Technology Adoption in the Public Sector

Digital government, also known as e-government, refers to "the use government makes of information and communication technology [ICT] – of which the Internet is a part - in its public tasks and the underlying (internal) work processes, (external) provision

of services and interaction with stakeholders, for instance citizens." (Bouwman, van den Hooff, van de Wijngaert, & van Dijk, 2005, p. 165). Government-to-Citizen e-government spans simply sharing information on a website through allowing citizens to complete transactions online.

Government-to-Citizen e-government is being actively pursued at the Federal and local Government levels. In 2012, President Barack Obama charged the Federal Chief Information Officer (CIO) with developing a comprehensive Government-wide strategy to build a 21st century digital Government that would deliver better digital services to the American people. Furthermore, Forbes reported in June 2015 that local and state government spending in the civic technology area is "growing 14 times faster than spending on traditional technology" (p. 5).

Research on the topic of organizational theory and behavior associated with e-government adoption and implementation has been limited. Bolivar, Munoz, and Hernandez (2010) found that out of over 400 journal articles on e-government published between 2000 and 2009, only 16 (4.98%) addressed organizational theory and behavior associated with innovation adoption and implementation. Many studies on the process of the evolution of e-government draw upon private sector frameworks such as business process redesign models.(e.g., Cordella & Iannacci, 2010). Two such studies, Burn and Robins (2003) and Scholl (2005), confirmed the importance of known private-sector change factors in e-government change success: the active involvement of diverse stakeholders, leadership sponsorship and commitment, deliberate consideration of social, cultural, technical and workflow elements. In looking at technology impact on the public sector work environment, Danziger and Anderson (2002) found positive impact in job

enlargement, job satisfaction with greater 'information power,' as well as negative impact

such as increased time pressure on completing tasks or isolation and reduced synergies

due to increased telecommuting. Research into organizational factors of e-government

have confirmed that successful technology adoption in government reflects general

organization change success factors.

Government differs from general business in two critical ways. First, government

is composed of diverse organizations that are not managed centrally and do not share the

same operating standards (Bouwman et al., 2005). Bouwan and colleagues (2005)

expanded on this notion by explaining that government is:

> Not a single organization but a complex of organizations that are difficult to
> manage centrally. In addition, certain layers of government, such as
> municipalities and regions, enjoy a certain level of autonomy. In the past, this
> autonomy has led to so-called 'island automation' with regard to the application
> of [technology]. Each part of government had and still has its own administrative
> organization, including the associated information systems, standards, programs
> and applications (p. 165) .

 The second way that government differs from business is in the nature of the

interactions between government and its customers. Fountain (2001) notes that while the

Internet has enabled a technical infrastructure that supports interoperability, that there is a

lag in government institutional infrastructure that is "required to support coordinated

practices, procedures, cultures, incentives, and a range of organizational, social, and

political rule systems that guide behavior and structure agencies." (p. 6). Continuing this

thought, businesses "deal only with consumers, whereas governments deal with

customers that are at the same time consumers, clients with certain rights as well as

voters" (Bouwman et al., 2005, p. 165). Unlike businesses where goods and services are

delivered as consumers demand, government service consumers represent those who are

legally entitled to receive services (e.g., supplemental nutrition or medical care assistance recipients), transact to comply with legal/regulatory requirements (e.g., business licensing, criminal justice), and those who rely on government to deliver and maintain civic goods (e.g. public education, road and highway maintenance). Payment for government services are often not linked to the actual consumer of goods (e.g., public education), so it may be that feedback loops of revenue or demand that drive performance changes in business are not the same drivers of change in government goods and services.

Given the complexity associated with e-government, there is an opportunity to research technology adoption practices that are driven by conditions specific to government rather than over-laying a "universal strategy" derived from private sector models (Cordella & Iannacci, 2010).

Consulting that leads to sustained results

Beginning in the late 1970s, the management consulting industry, then a $2 Billion industry in the United States, started getting bad press for providing "impractical data and poorly implemented recommendations" (Turner, 1982, p. 120). To the present day, consulting projects are still most commonly measured by completion of specific deliverables (e.g., analyses, reports, recommendations), appropriate consumption of resources and inputs (e.g., client time used, cost of project) and general client satisfaction (Phillips & Phillips, 2011). Less commonly measured is the success rate and best practices associated with whether and how external consultants help clients achieve real results or sustained improvements. And, outside of personal accounts, "there is virtually no published research information on the success rate in consulting" (Schaffer, 2002, p. 19).

Turner (1982) provides a survey of work proposing consulting practices aimed to enhance client adoption and successful implementation of consultant recommendations. To follow are highlights of works still used today to teach effective consulting skills.

Turner (1982) proposed the following essential purposes to effective consulting either as by-products of traditional consulting deliverables or as deliberate goals: Building a consensus and commitment around corrective action, facilitating client learning, and permanently improving organizational effectiveness. To demonstrate an orientation to these essential purposes, in contrast to traditional consulting goals, he suggests incorporating the following practices into the typical consulting steps which can be seen in Table 1.

Table 1.

Traditional and Essential Purpose-Driven Activities in Consulting

Consulting Steps	Traditional Activities	Essential Purpose-Driven Activities
1. Provide Information	Offer information client requests	Explore underlying needs
2. Solve Problems	Respond to explicit problem	Identify implicit problem
3. Effective Diagnosis	Independent expert diagnosis	Client participation
4. Recommendations	Independent recommendations	Client participation
5. Implement	Considered client responsibility	Consultant-client collaboration
6. Build commitment	(Not applicable)	Involve client in each phase
7. Facilitate learning	(Not applicable)	Seek mutual learning
8. Org effectiveness	(Not applicable)	Model effective methods

Block (1981) identified three typical roles for consultants (expert, a pair of hands, and a collaborator). To better ensure expertise is used, Block (1981) recommended approaching the consulting engagement as a collaborator. Block (1981) outlined twelve steps that precede implementation of solutions where clients and consultants can already begin sharing responsibility and collaborating, to ensure recommended solutions are the right solutions for the client and to reduce client resistance to implementation (see Appendix A for an adapted example). Table 2 provides a summary of best practices for each major phase of client interaction.

Table 2.

Best Practices for Phases of Client Interaction

Phases of Client Interaction	Best Practice Highlights
Contracting	Negotiate wants. Cope with mixed motivations. Surface concerns about exposure and loss of control. Be cognizant of your client's internal clients.
Data Collection & Diagnosis	Purpose is to get action, not research. Conduct data collection and data interpretation jointly with the client. Elicit both the technical/business problem and how the problem is being managed. Distinguish between the presenting problem and the underlying problem. Focus on the next steps the client can take.
Feedback	Present personal and organizational data. Condense the data – focusing on items that client has control over changing, are important and related to an existing business commitment Structure and control the meeting to elicit client reaction and choice of next steps

Schein (1987) introduced the concept of process consultation, where the emphasis is on helping clients develop their capacity to solve problems for themselves. Two key assumptions that drive this consultation approach are: 1) that all organizational problems are fundamentally problems involving human interactions and processes and 2) that an effective consultant passes on their skills of how to diagnose and fix organizational problems so that the client is more able to continue on their own to improve their organization. Schein (1987) provided guidance on best practices to address organizational human processes:

1. Be familiar with basic human processes: intrapsychic processes, cultural rules of interaction and frameworks on initiating and managing change.

2. Understand your client system: contact clients, intermediate clients, primary clients and ultimate clients.

3. Know when to shift between expert-guidance and process consultation.

4. Use the following forms of interventions as appropriate: (p. 159)

   a. Open-ended inquiry, diagnostic interventions to stimulate client's own diagnostic thinking (e.g., active listening)

   b. Inquire or assert one or multiple action recommendations to begin to suggest what the client might do (e.g., leading questions)

   c. Use confrontive interventions to test the client's level of insight, motivation and readiness to act (e.g., feedback)

Schaffer (2002) blended the notion of content and process consulting with an emphasis on achieving results. Without seeing and experiencing results, the client will

not cross the "implementation gap" typical of traditional consulting engagements.

Schaffer (2002) identified five best practices:

1) Define every project in terms of client results that the client and consultant agree to achieve together.

2) Design projects to match client motivation and capability – assess the kinds of changes the client is likely to be ready, willing and able to carry out as early as possible in the engagement

3) Divide large projects into rapid-cycle subprojects.

4) Develop a working partnership between client and consultant – reducing, if not eliminating, back-and-forth hand-offs of responsibility in favor of working together

5) Leverage consulting inputs by helping clients make better use of their own talents and skills

To help consultants work more effectively with their clients, and to help clients achieve real results and change they seek, practicing consultants have each provided best practices from their personal experiences. There is no published research yet available demonstrating the broad effectiveness of these practices, but it is clear both clients and practicing consultants would benefit greatly from such research.

Effective Training

For consultants to become effective at influencing clients to change behaviors and processes, to collaborate effectively with clients to achieve results, Nevins (1998) proposes that the key is to "teach every professional how to learn" (p. 187). To enable teaching how to learn, Nevins (1987) suggested training that helps consultants know

themselves and that values self-reflection not only to help in consultants' own self-development but also to help them more effectively develop their colleagues as well as their clients. The method Nevins (1998) employed while building a "university" at a multi-national management consultancy included off-site courses, "learning labs" that tested skills in a "real time" interactive setting, self-study resources, peer-directed training and on-the-job training that included programs delivered to joint client/consultant teams.

Nevins (1998) described how the design and modalities of training are driven not only by the content to impart, but also the outcomes sought – whether they are the practice of new skills or the application of a new perspective or attitude. Rothwell and Kazanas (1992) expanded upon training strategies based on outcomes sought using the instructional event framework originally developed by Gagne and Briggs (1979). To build capabilities that were a mixture of intellectual skill, cognitive strategy, and attitude, Rothwell and Kazanas (1992) outlined the following strategies using the nine instructional event framework:

1. *Capture the attention of the learner.* Introduce a change in stimulus.
2. *Describe what performance objectives are to be achieved.* Inform learners of what solution/outcome is expected and provide an example.
3. *Help learners recall prerequisite learning.* Encourage learners to recall related strategies or related skills.
4. *Present instruction.* Give examples of concepts or rules to be learned, and make clear where learners have choice in their actions.

5. *Guide learners through materials.* Give learners opportunity to observe the model or choice of what to do.

6. *Prompt the performance.* Have learners apply the performance, or describe what they would do in real or simulated situations.

7. *Give feedback.* Affirm that the concept has been applied correctly.'

8. *Evaluate how well learners are achieving objectives.* Learner demonstrates application of concept.

9. *Help learners retain what they have learned and apply it.* Review material periodically.

To confirm the effectiveness of training design and delivery, designers must engage in summative evaluation where learners are assessed on any changes to behavior because of the training. Kirkpatrick's (1996) Four Level model of training evaluation is a widely used model for training evaluation which has remained relatively unchanged since its introduction. The model's four areas are:

1. *Reaction.* The more the training program is liked by the participants, the more likely the participants are to pay attention and to learn, and the more likely the program will be seen as a positive investment by the organization.

2. *Learning.* The more participants understand and retain the new concepts delivered in the training, the more prepared they will be to apply the knowledge post training.

3. *Behavior.* Determining whether participants actually change their behavior as a result of the training is difficult, but an important step to explain whether the training led to desired results.

4. *Results.* Business reasons for engaging in training – increase in productivity, decrease in costs or increase in quality, for example – are what drive whether the investment in the training program is justified. Positive findings on results will justify the necessity and effectiveness of the training, but evaluation of results is the most difficult area to measure due to the longer timeline needed to observe results.

Chapter 3: Methodology

The purpose of this action research study was to determine the efficacy of a collaborative consultation module for the Fellows at Code for America. There were three phases to this study:

1. Develop a collaborative consultation module and pilot it with the Fellows

2. Collect data to determine its efficacy and make improvements needed

3. Implement as part of the formal training and development of future Fellows.

This chapter describes the methods that were used in the present study. The research design is described first, followed by a description of the procedures used for sampling, data collection, and data analysis.

Research Design

The three phases of this study and the associated variables used to determine efficacy for each phase are depicted in Table 3.

Table 3.

Research Variables and Operational Definitions

	Variable	**Conceptual Definition**	**Operational Definition Required For Measurement**
Phase 1: Develop Training Module. *Did the training module effectively transfer knowledge?*	Training program effectiveness: Positive reaction, Learning	Levels 1 and 2 of Kirkpatrick's Training Evaluation: Participant Reaction and Participant Learning	More than 70% of participants rate the module as being valuable. More than 70% of participants indicate a comfort and desire to apply the concepts presented.
Phase 2: Determine Efficacy of Training Module. (Part A) *Did the participants apply the concepts presented?*	Training program effectiveness: Behavior change	Level 3 of Kirkpatrick's Training Evaluation: Participant Behavior	Balance of Responsibility diagrams (Block) show at least one measure moving from an extreme to the center. Participants report planned or implemented collaborative activities with clients
Phase 2: Determine Efficacy of Training Module. (Part B) *Did satisfaction of the overall engagement improve as a result of application of these concepts?*	Training program effectiveness: Results	Level 4 of Kirkpatrick's Training Evaluation: Results	Client and participant (Fellow) satisfaction level at the end of the project should be higher for those teams that implemented collaborative activities compared to those teams who did not. Should all teams implement collaborative activities, we would expect satisfaction rates to be higher than last year's average. *Only influence will be inferred. Causation cannot be proven in either circumstance.
Phase 3: Improve Module and Implement for Future Fellows	Repeat the above Phase 1 and 2 evaluations with new cohort		

The first phase of the study involved the development of a training module that effectively transfers knowledge (Appendix B). The module was designed using training design best practices (theory lecture, theory-in-action stories, self-reflection, worksheets using concepts presented, and reinforcement activities following training), followed by participant surveys to capture reaction and knowledge transfer. The survey tool can be found in Appendix C.

The second phase of the study sought to determine whether and how collaborative consulting concepts were applied following the classroom training module. Interviews were conducted with Fellows during their last three months of the Fellowship to 1) review Client/Consultant Responsibility Balance Tool (Block) and compare results from during the training session to results from a recent client activity and 2) to gather data on how clients are currently being engaged. The engagement domain was assessed with three questions: 1) Describe the contact/interactions you are regularly having with your client, 2) What transition activities, if any, are you engaging in or have planned? and 3) Have the fellow rate each of the interactions they've described using the balance of responsibility chart. An activity was considered "collaborative" if Fellows rated that activity as having a high (between 40/60 and 60/40 on Responsibility Balance Tool) level of shared activity/shared responsibility with their clients. These recorded and transcribed interviews identified whether collaborative consulting practices were being utilized.

Another important question evaluated during the second phase of the study was whether overall satisfaction improved because of using collaborative consulting practices. While causation would not be determined, improvement in both client and Fellow

satisfaction at the end of the project would signify this module as being efficacious. Exit interviews with Fellows and reviews of Client end-of program-statements were gathered to assess program satisfaction. Both interviews with Fellows and Client public statements were recorded and transcribed.

Findings from Phase 1 and 2 informed Phase 3 module redesign, and implementation with the new 2017 Fellows cohort would commence in April or May 2017, with evaluation cycles defined in Phase 1 and 2 repeated.

Sampling

The 2016 Fellowship cohort consisted of 17 Fellows, working in five groups of three and one group of two. Training was provided to at least one member of all groups of three. A post-training survey was provided to all 11 participants. Interviews were conducted with one member of each team who participated in the training during the last three months of their project. All clients and all Fellows provided end-of-Fellowship feedback in post-Fellowship interviews and civic technology conference public statements.

Data Collection

Data was collected by the Fellowship Program Manager and the HR Director. Questionnaire tools were designed by the HR Director in consultation with the Fellowship Program Manager.

Chapter 4: Findings

The training module, titled "Teaching to Fish," was delivered in a 2-hour session to members of five out of six 2016 Fellowship Teams on April 26th, 2016. 12 out of 17 total possible participants attended the training and the composition of those teams can be seen in Table 4.

Table 4.

Training Module Team Attendance

Team #	Attended	Did Not Attend
Team #1	Product Manager	Engineer, Designer
Team #2	Engineer, Designer	Engineer
Team #3	Engineers (2), Designer	
Team #4	Designers (2), Engineer	
Team #5	Product Manager, Designer, Engineer	
Team #6		Engineer, Designer

Phase 1 Findings: Did the training module effectively transfer knowledge?

The participant survey tool was administered to participants one week following module delivery. While all participants were encouraged to provide feedback, instructions allowed team members to submit a single response to represent team-wide feedback. Survey responses were received from at least one member of each team in attendance, with eight out of 12 possible submissions received. Results of the survey indicated that more than 70% of the participants found the module to not only be valuable, but felt both comfort and desire in applying the concepts.

To measure value of the module, the survey assessed topic relevance and helpfulness of design elements. Both the topics covered and the design of delivery of this module

have met the standard to be considered efficacious with more than 88% of respondents finding the topics and design to be relevant and helpful.

Topic relevance and training design. Each of the four topics was rated "Relevant" by seven or more (88%+) of the respondents. Regarding training design, each of the four design elements were rated "Helpful" by seven or more (88%+) of the respondents.

Propensity to apply concepts. To measure initial propensity to apply the concepts of this module, the survey asked whether the session impacted how participants might approach future interactions with their government client. Six participants (75%), representing five out of six teams, indicated this module would impact their future client interactions. The remaining two participants responded "Not Sure Yet" to this question.

Activities present prior to training. All teams reported already engaging diverse clients and stakeholders on a "somewhat" to "regular" basis. Sharing responsibility with the client was already being undertaken to a lesser extent (two people from different teams indicated "Not at All") and teaching clients new skills or principles was the least common (three people across two different teams indicated "Not at All").

Comfort applying ideas proposed in training. Seven out of eight (88%) respondents felt comfortable continuing to apply their skills in engaging diverse clients, but only three respondents (38%), each from three different teams, indicated a positive level of comfort either teaching clients new skills or sharing responsibility for the project with the client.

Overall, the design and delivery of the module indicated an effective transfer of knowledge with positive ratings on content, design elements and the initial measure of

desire to apply the concepts. However, the module did not perform satisfactorily in terms of creating a high level of comfort in applying the concepts of collaborative consulting.

Phase 2/Part A Findings: Did the participants apply the concepts presented?

Approximately four months after the training module was delivered, interviews were conducted with each of the teams to assess what, if any, of the concepts from the module were being applied.

Four out of the five teams reported collaborative activities for project sustainability and all had at least one measure move towards the center in the Balance of Responsibility diagram (See Appendix D). While these results meet the measures of success identified for this action research study, the variation of responses by team imply different avenues for module improvement. Please see Table 5 for a more thorough breakdown.

Table 5.

Collaborative Activities in Practice Four Months Following Training

		Team #1	Team #2	Team #3	Team #4	Team #5	Team #6
In Practice Prior to Workshop	Engaging Diverse Stakeholders	Somewhat	Regularly	Regulary	Somewhat/Regularly	Somewhat/Regularly	
	Sharing Responsibility with Client	Not at all	Regularly	Somewhat	Somewhat	Not at all/Somewhat	
	Teaching New Skills	Not at all	Regularly	Somewhat	Somewhat/Not at all	Not at all/Somewhat	
Balance of Responsibility 40/60 or 60/40 split	Defining initial Problem			x			Did not attend module
	Deciding to Proceed						
	Selecting Dimensions to be Studied			x		x	
	Who is involved in the Study			x			
	Selecting method of data collection			x	x		
	Data Collection			x	x		
	Data Synthesis, Summary and Analysis		x	x			
	Feedback of Results			x			
	Recommendations			x		x	
	Decision on Actions	x	x	x			
Sustainability Activities Reported in August		User Research 101 workshop. Shadowing opportunities.	None reported.	City partner and funder selected project items they will continue	Analytics Club started to steer future work. Transition of tasks to staff beginning. Created one budgeted headcount.	Data Academy monthly sessions including Form Design 101. Created two budgeted headcount.	Code for America and city partner have committed to continuing product

Teams 1, 4, and 5 delivered workshops to teach new skills on a regular, monthly basis following the module, while prior to the module this practice was either not at all in practice or only somewhat in practice. Each of these teams indicated either one or two project activities at a balance of responsibility that was closer to the center than prior to the workshop. Comments that indicate adoption of module concepts included:

> I think of it like...so here's January...as we go through the year, we're doing 100% of the work at first, when we get to November we need them to do 100% of the work...we're down here, what we don't want to happen is … they have to ramp up completely in one week.

> We can't make them do it, I think we can model the behaviors very clearly of what we want them to carry out...a key part of [our] agenda…is trying to take behaviors that we're doing and providing a higher level of structure for them to imitate those behaviors so they become familiar.

> It gave us a good perspective of trying to empower them to take more of an active role, instead of viewing it as we're consultants do things and they leave.

Team 3 had a strong funder stakeholder that committed early in the project to further its development post-fellowship. The team experienced significant partnering of responsibility throughout that project, with nine of ten project activities closer to the center of the balance than prior to the workshop. However, this team worked on several projects in addition to this funder-identified project where not as much collaboration was possible given the dispersed stakeholders involved. One member of the group commented, "If I had any feedback, this is the time where we'd need most of this information. Our sustainability efforts are really starting up now."

Team 2 was the only team that indicated no sustainability activities in August ("We haven't thought much about sustainability…It will be our September visit"). This team indicated the highest level of shared responsibility prior to the module, having indicated a regular practice of teaching, sharing responsibility, and engaging diverse stakeholders. However, in August, this team indicated that only two of ten project activities were at a balance of responsibility at or better than a 40%/60% or 60%/40% split. In reviewing the Balance of Responsibility grid, a team member commented "I think it's changed a lot - a decision point around our dynamics - in the beginning it was the client has responsibility and we were reacting to that. Now we have a lot more responsibility and client has less."

These Phase 2 findings collected four months following module delivery indicate Balance of Responsibility measures moving favorably towards more shared client/consultant responsibility and reported that four of the five teams were planning or already in-progress with sustainability activities. While these Phase 2 findings indicate module efficacy overall, because one of the five teams had not yet begun sustainability conversations with their client this implies room for module improvement.

Phase 2/Part B Findings: Did satisfaction of the overall engagement improve as a result of application of these concepts?

To assess the level of Fellows satisfaction, exit interviews were conducted during the last month of their program (See Appendix E for Exit Interview Questionnaire). All Fellows were asked the following question in a one-on-one interview: "Now that you're nearly completed with the fellowship, if we could re-wind to January, and you had the choice of doing the program again, would you?"

The results suggested 2016 Fellow satisfaction may have slightly improved over 2015 Fellows in that there were no negative responses to this question. However, given the small sample size the results did not conclusively show any change in satisfaction from 2015 to 2016.

Project sustainability was a topic of frustration raised in 2015 Fellowship exit interviews (Stone, 2015). Members of five out of eight 2015 Fellowship teams indicated a mismatch of client expectations and lack of support for project sustainability. Illustrative comments:

Transitioning the work is hard – I don't think the fellowship team really gets it.

The Fellowship program hasn't acknowledged long track record of things not going anywhere...there's a real need to rethink it.

In contrast, this topic was not raised as a frustration in any of the 2016 Fellowship exit interviews (Stone, 2016). Instead, when sustainability was raised, it was in the context of appreciating the preparation provided in this new module. Members of four out of the five participating 2016 Fellowship Teams identified this module as a training that was immediately useful in their work:

The client mapping tool was useful, wish we had it sooner.

Brenda's training specifically – it's not just product but outcome.

To assess client satisfaction, public statements related to project sustainability were reviewed. The conclusion of each Fellowship culminated in a public presentation

by the fellow and client partner at an annual civic technology conference hosted by Code for America called The Summit. More than 800 attendees from across the country participated in the 2015 and 2016 Summits, and recordings of these Fellowship project presentations were made available for public view on YouTube.

Below is a summary of clients who publicly announced activities to carry forward learnings from their Fellowship, plotted against Fellowship teams whose members indicated whether they would rejoin the Fellowship. First, notice there is no discernable pattern or connection between Fellowship Team satisfaction and client commitment to sustainability plans in either 2015 nor 2016. The data shows that even when clients committed to sustaining the project, Fellowship satisfaction with the experience was not assured. Second, note that 80% (4 of 5) of the clients in 2016 reported plans to carry forward learnings or sustain the Fellowship work, compared to 75% (6 of 8) of the clients in 2015. While inconclusive given the small sample size, the data suggest improvement from 2015 to 2016.

Overall, Phase 1 and 2 results suggest module efficacy based on the conditions selected for this study. For a complete review, please see Table 6.

Table 6.

Summary of Results by Operational Definitions

	Operational Definition Required For Measurement	Result Summary
Phase 1: Develop Training Module. *Did the training module effectively transfer knowledge?*	More than 70% of participants rate the module as being valuable. More than 70% of participants indicate a comfort and desire to apply the concepts presented.	**Met.** 88% or more rated module as being valuable across multiple areas. **Mixed.** Depending upon the topic, 38% - 88% expressed comfort.
Phase 2: Determine Efficacy of Training Module. (Part A) *Did the participants apply the concepts presented?*	Balance of Responsibility diagrams (Block) show at least one measure moving from an extreme to the center. Participants report planned or implemented collaborative activities with clients	**Met.** 100% of teams reported at least one measure moving towards center. **Mixed.** 80% (4 of 5 teams) reported planned collaborative activities with clients.
Phase 2: Determine Efficacy of Training Module. (Part B) *Did satisfaction of the overall engagement improve as a result of application of these concepts?*	Client and participant (Fellow) satisfaction level at the end of the project should be rated higher for those teams that implemented collaborative activities compared to those teams who did not. Should all teams implement collaborative activities, we would expect satisfaction rates to be higher than last year's average. *Only influence will be inferred. Causation cannot be proven in either circumstance.	**Met.** Data suggests both Fellow and Client satisfaction levels improved overall. Data also suggests an absence of sustainability being a significant negative factor in the 2016 Fellowships.

Chapter 5: Conclusion

The purpose of this action research study was to determine the efficacy of a collaborative consultation module for the Fellows at Code for America.

Results of this study suggest module efficacy based on the effectiveness of knowledge transfer, whether participants applied the concepts presented, and whether satisfaction in the program improved for both Fellows and clients. While several of the criteria were met and strongly demonstrated efficacy, there were some measures that produced mixed results suggesting improvements for future module development. Table 7 shows a summary of the results.

Table 7.

Summary of Findings

Criteria	Results
Effective knowledge transfer measured by 70% or higher positive ratings.	**Mixed**
a) Topic relevance	88% - 100% across categories
b) Training method and resources	88% - 100% across categories
c) Comfort with applying concepts post training	
a. Engaging diverse stakeholders	88% comfortable
b. Teaching new skills	38% comfortable, 63% unsure
c. Sharing responsibility	38% comfortable, 50% unsure
Actual application of concepts measured by 100% teams reporting:	**Mixed**
a) At least one Balance of Responsibility measure moving towards center	100%
b) Planned or implemented collaborative activities with client	80%
c) Identified as a useful module at the end of the Fellowship	80%
Satisfaction improvement	**Met**
Fellows willing to re-join	80% 2016 Fellows compared to 77% 2015 Fellows
Clients reporting sustaining activities	80% 2016 Clients compared to 75% 2015 Clients

Considering the findings, the following conclusions and implications for further development are presented:

1. **Topic Relevance and Valuable.** Sustaining outcomes from Fellowship projects is important to both Fellows and government partner clients. Pursuing improvements to this training module will be worthwhile for future Fellowship projects.

2. **Questionnaire included inconsistent scales and labels.** Four-point and Five-point scales were used, and labels of scale extremes (e.g., Not to Very) may have inordinately skewed results to the positive. Future scales should employ the five-point scale, allowing neutral/unsure responses, and should remove "Very" from label names.

3. **Improve resources and training approach on Sharing Responsibility with Client.** Fellows were the least familiar with this skill and did not have a high level of comfort pursuing this activity following the training. Also noticed were the diverse ways the Balance of Responsibility shifted between teams, indicating that future training would benefit from addressing many different contexts as well as providing real-life examples. Further research will be necessary to design an effective training on this topic.

4. **Improve resources and training approach on Teaching New Skills to the client.** Fellows were not familiar with these skills and did not have a high level of comfort in pursuing these activities following the training. Interestingly, multiple teams undertook teaching activities in the latter months of their fellowship. This training can be improved by providing real-life examples as well as providing training templates and other resources created by prior Fellowship teams.

5. **Follow-up coaching on client collaboration three months before end of Fellowship.** The interim program evaluation for this study not only gathered important feedback on the application of the module, but also served as another opportunity to refresh skills or provide coaching and guidance. Around this point in the Fellowship, challenges specific to the client begin to emerge – whether it is turnover of key client contacts, limitations of the technology that may require costly investment, or inter/intra team dynamics. Future trainings should maintain this practice, and provide more time to entertain questions and brainstorm potential collaborative approaches.

6. **Multiple paths for sustainability identified.** Clients identified a number of different ways elements of the Fellowship project would be carried forward. They included a) the planned expansion of users of the tool, b) new ways of viewing and approaching their work that changed as a result of the Fellowship (eg. Adopting a user-centered approach to designing workflows, diverse stakeholder design meetings), c) gaining approved headcount to hire technology staff. Future trainings can incorporate these specific pathways and ways to successfully collaborate with client on these pathways (eg. If headcount is approved, assisting in job description development to attract qualified candidates).

Limitations of this study

Several limitations were identified in this action research study.

1. Small sample size. Limited access to multiple cohorts and direct access to clients.

2. Time available. Due to the time available to conduct this study and the duration of each Fellowship project, the module was delivered to only one cohort.

3. Generalizability. The limited sample size of this study may have produced results that do not show real statistical difference from prior year data, as any individual response could have changed results by significant margins.

4. Access to key stakeholders. Access to government partner clients was limited in 2016, due to contracts that did not require post-program evaluation. To assess actual project sustainability, an assessment with the government client at least three months following Fellowship completion would have provided valuable insights into actual sustaining practices and collaborative consulting approaches that enabled such sustaining practices.

Suggestions for further research

Conducting another round of training and evaluation, incorporating the improvements, will yield additional improvements to refine this module and ultimately lead to more lasting technology adoption with Code for America's government partners. Further research overall in the efficacy of collaborative consulting practices will add to the very limited body of knowledge demonstrating consultation techniques that result in positive and lasting change. Both clients and practicing consultants would benefit greatly from further research into effective collaboration consulting practices and training.
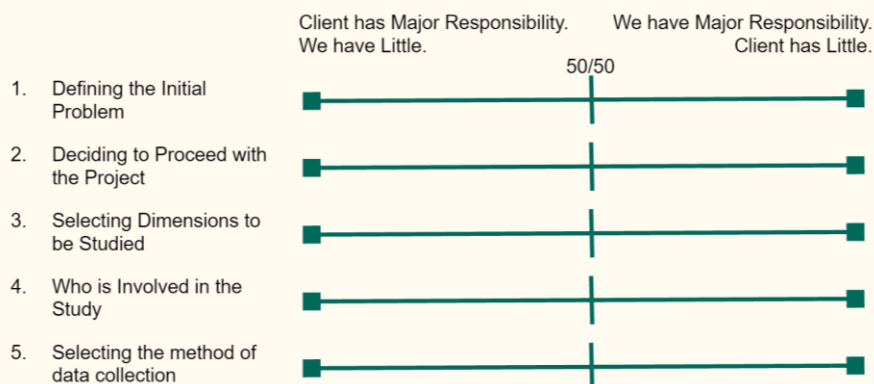
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Appendix A: Balance of Responsibility Tool (Adapted from Block, 1981)

Assess the Balance of Responsibility - Steps 1-5

Client has Major Responsibility. We have Little.   We have Major Responsibility. Client has Little.

50/50

1. Defining the Initial Problem
2. Deciding to Proceed with the Project
3. Selecting Dimensions to be Studied
4. Who is Involved in the Study
5. Selecting the method of data collection

Assess the Balance of Responsibility - Steps 6-10

Client has Major Responsibility. We have Little.   We have Major Responsibility. Client has Little.

50/50

6. Data Collection
7. Data Synthesis, Summary and Analysis
8. Feedback of results
9. Recommendations
10. Decision on Actions

Appendix B: Training Module Materials

Teaching to Fish
—
Sustain your project, sustain the change

Hierarchy of Purposes

Improve **organizational effectiveness**
Facilitate client **learning**
Build **consensus and commitment**
Assist **implementation**
Provide **recommendations**
Conduct **diagnosis** that may redefine problem
Provide **solution** given problem
Provide requested **information**

Arthur N Turner, "Consulting is more than giving advice," HBR September-October 1982, p. 122.

1.

Consulting = Teaching

2.

To Reach the Top - Think about how you'll:
→ Establish a Collaborative Relationship
 ◆ Move beyond being an Expert and a Pair of Hands
→ Ensure Attention is Given to Both the Technical Problem and How the Problem is Being Managed
 ◆ The theoretically "right" answer may not be the best one for the organization
→ Solve Problems so They Stay Solved
 ◆ What skills will serve city partners as they address similar problems? Peter Block, Flawless Consulting: A Guide to Getting your Expertise Used, Pfeiffer & Co, 1981.

An exercise

Who are your clients?

&

How do you work with them?

Assess the Balance of Responsibility - Steps 1-5

	Client has Major Responsibility. We have Little	50/50	We have Major Responsibility. Client has Little.
1. Defining the Initial Problem			
2. Deciding to Proceed with the Project			
3. Selecting Dimensions to be Studied			
4. Who is Involved in the Study			
5. Selecting the method of data collection			

3.

Map your Client Constellation

Sponsor/Resource Owner
Problem Owner
Implementer/Maintainer
Contact Person
End User

More Ideas: Ashley Meyers' presentation

Assess the Balance of Responsibility - Steps 6-10

	Client has Major Responsibility. We have Little	50/50	We have Major Responsibility. Client has Little.
6. Data Collection			
7. Data Synthesis, Summary and Analysis			
8. Feedback of results			
9. Recommendations			
10. Decision on Actions			

4.

Re-Balancing Responsibilities

Places where your mark deviates to the right, away from the center, indicates a place where you can increase client involvement, and increase chances your project will still be active and used after you've left the scene.

Know your Wants: What support and involvement do you need from the client? Do you know and agree on what a successful fellowship will look like? Who do you need to be involved?

Write down your "contracts." You can contract for behavior, you can't contract for someone to change their feelings. You can't contract with someone who's not in the room.

Actively involve the client. What will you do during each gathering to tilt the balance away from presentation and more toward participation?

Pay special attention to dynamics outside the technical problem. How are you planning to provide the space for people to voice their concerns and opinions? How can you structure time for serious dialogue on how things will change?

Hierarchy of Purposes

Improve **organizational effectiveness**
Facilitate client **learning**
Build **consensus and commitment**
Assist **implementation**
Provide **recommendations**
Conduct **diagnosis** that may redefine problem
Provide **solution** given problem
Provide requested **information**

Arthur N Turner, "Consulting is more than giving advice," HBR September-October 1982, p. 122.

Learning = Change

5.

Experiential Learning Theory:

Cycle & Types
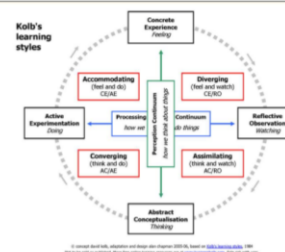
Kolb's learning styles

6.

Case Studies

Split into two groups, each interviews one alum, reports out to whole group

David Leonard: San Antonio

Tiffany Andrews: Indianapolis
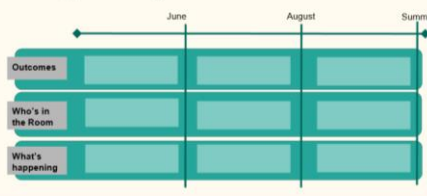
Ready to Make this Work?

Learning Engagements

Can you design one Learning Engagement that involves each step of learning?

Kolb's learning styles

More Ideas: Ashley Meyers' presentation, slides #26, 36, 40

7.

Putting it All Together

	June	August	Summit
Outcomes			
Who's in the Room			
What's happening			

8.

Planning a Thing

People and Roles		Agenda		
Contact Person		Objectives / Outcomes		
Problem Owner/ Co-Designer		Prep: PreWork, Read Ahead materials, etc.		
Implementer(s)		Logistics		Countdown to Event Day
Resource Manager		Venue		Stuff to complete 1 month before event?
Users		# Attendees		2 weeks before event?
Feedback and Measurement		Date/Time/ Duration		Week of event?
How will you measure impact/ collect feedback?		Invitations/Deadlines:		Day of event?
When collected?				
Report results back?				

Was this helpful?

Do you think you'll use these tools and processes to help you in your product development?

Do you need more information?

9. Reflect = Learn

10. **References**

Flawless Consulting

Kolb Learning Style Inventory
Interested in identifying your/your team's learning styles?

See Brenda for a "lite" version of this!

Peter Block's *Flawless Consulting*

Appendix C: Participant Survey Tool – Reaction and Learning Measures

Teaching to Fish - How was it?

Thanks for participating in our first ever Collaborative Consulting training. We'd love your feedback!

Your username (**brenda@codeforamerica.org**) will be recorded when you submit this form. Not you? Sign out

* Required

How relevant are each of the following topics to your project? *

	Not Sure	Not relevant	Somewhat relevant	Very relevant
Hierarchy of Purposes in Consulting	O	O	O	O
Defining various clients to consider	O	O	O	O
Assessing Balance between Your and Client Responsibilities	O	O	O	O
Elements of the Experiential Learning Cycle	O	O	O	O

How helpful were each of the following elements of the session? *

	Not sure	Not helpful	Somewhat helpful	Very helpful
Concept overviews	O	O	O	O
Team exercises	O	O	O	O
Examples and Stories from the field	O	O	O	O
Slide deck	O	O	O	O

Has this session impacted how you will approach future interactions with your government partner? *

O Not sure yet

O Yes

O No

Rate how much you were already incorporating these ideas into your work prior to this session *

	Not at all	Somewhat	Regularly
Engaging diverse clients, stakeholders	O	O	O
Sharing responsibility for the project with your government partner	O	O	O
Teaching select clients new skills or principles	O	O	O

How comfortable are you employing the ideas below? *

	1 = Not comfortable	2	3	4	5 = V comfo
Engaging diverse clients, stakeholders	O	O	O	O	C
Sharing responsibility for the project with your government partner	O	O	O	O	C
Teaching select clients new skills or principles	O	O	O	O	C

What would help you feel more prepared or interested in applying the concepts we shared?

Long answer text

Would you be interested in any of the following follow-up support? (check all that apply)

- [ ] One on one coaching from fellow alum on these topics
- [ ] Supplemental written materials outlining examples, applications of the concept
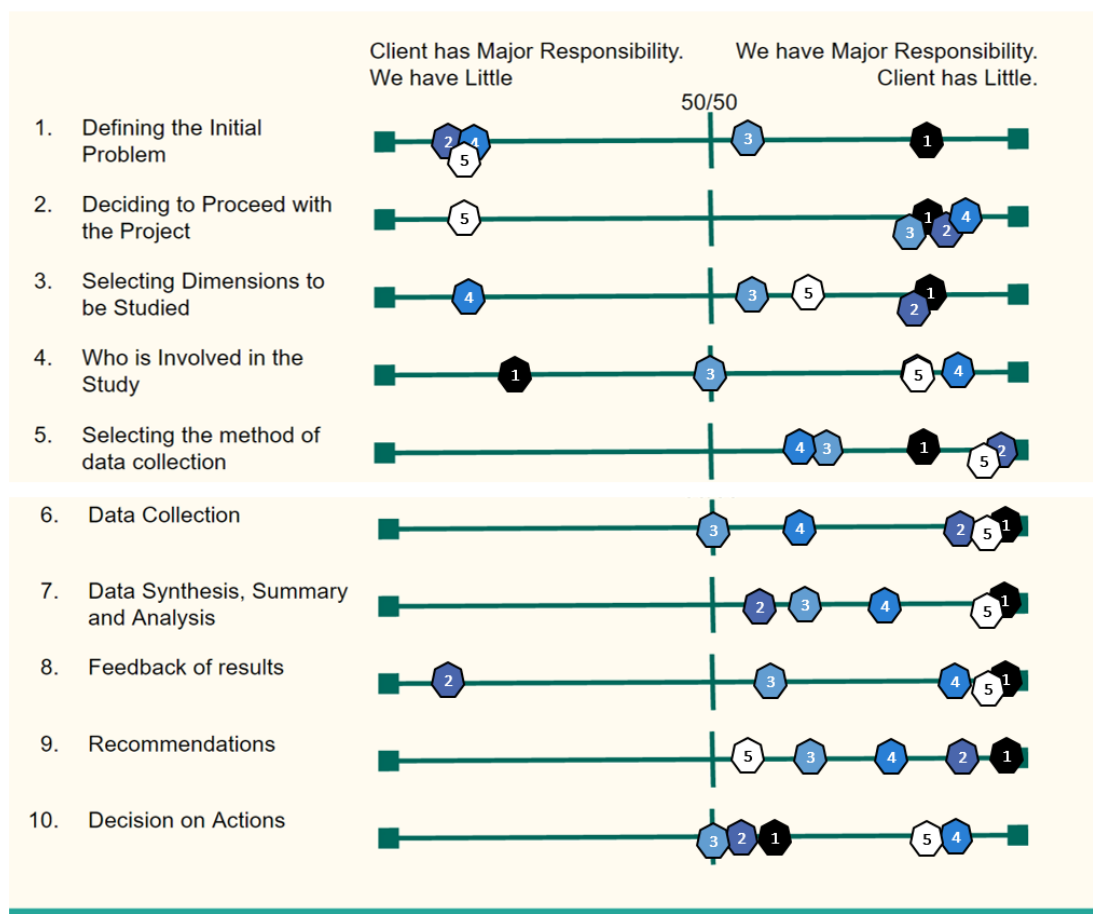- [ ] Followup group working session
- [ ] Kolb Learning Style Inventory assessment
- [ ] Other...

What other suggestions do you have that might improve this session for future cohorts?

Short answer text

Appendix D: Balance of Responsibility Chart (8 months into Program)

Appendix E: Exit Interview Question Template

1. Now that you're nearly completed w/ the fellowship, if we could re-wind to January, and you had the choice of doing the program again, would you?
2. What trainings/resources from onboarding or throughout the year were immediately useful in your work (i.e. you referred back to them throughout your fellowship)? What would you have wanted more of? Do you have suggestions for new activities?
3. What was the highlight of your time here? of your experience with CfA the organization (not necessarily program specific)
4. What was the most frustrating or disappointing part of the experience with CfA the organization (not necessarily program specific). Followup if necessary: what could CfA have done better to improve your experience in the fellowship program? (or how could CfA supported you better?)
5. What are you planning to do next? (I don't know yet is okay)
6. Has Code for America changed your long term career goals? If so, how?
7. Would you work for the government? (Would you have given the same answer in January?)