HANDBOOK OF

The Wisconsin
Certified Public Manager® Program

For
Cohort Candidates and Their Agencies

Revised September 2019

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WELCOME

You have in your hands the latest version of the handbook for candidates, and their agencies, in the Wisconsin Certified Public Manager® Program. This handbook should answer almost all your questions. If you have questions, please check in the handbook before contacting us.

The cohort format of the CPM program is designed to provide all Core classes and the required number of elective hours in each category, so it will not be necessary to keep track of your progress through classes. Information contained in this handbook is meant primarily to give you an overview of the program and its policies, and assist you in your assignments.

If you run into a problem, or, after having looked through the handbook, you have an unanswered question, please don't hesitate to contact us. We *are* here to help you use the program to your best advantage.

We hope your experience with the Certified Public Manager program energizes you, helping you to respond even more effectively to the high calling of public management.

Chrys Mursky, Director
Sunshine Jansen, Program Manager

THE WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM

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- ❖ The Wisconsin Certified Public Manager Program (CPM) is a 300-hour nationally-accredited comprehensive management development program *specifically* for managers in state, local and federal government and in tribal and non-profit organizations.

- ❖ The CPM Program recognizes the unique demands and challenges of the public management profession. It focuses on developing competencies necessary for high individual, team and organizational performance.

- ❖ The CPM Program is targeted at managers and supervisors as well as those who manage projects and programs. In addition, individuals with public sector leadership aspirations who have demonstrated leadership potential can benefit from this program.

- ❖ A candidate is awarded the Certified Public Manager® designation upon completion of the CPM program. This designation is recognized throughout the United States.

WISCONSIN
CERTIFIED PUBLIC MANAGER® PROGRAM

MISSION

The mission of the Wisconsin Certified Public Manager Program is to contribute to the continuous improvement of public services in the State of Wisconsin by providing an educational program offered on an in-service basis to current public service employees.

The Certified Public Manager® Program is committed to:

Contributing to the professional development of Wisconsin's public sector employees;

Sharing the educational resources of the University of Wisconsin System;

Strengthening the capacities of Wisconsin's state, county, and municipal governments to carry out their responsibilities; and

Serving as the knowledgeable and well-informed voice in Wisconsin on all matters relating to in-service public sector training and education.

CORE VALUES

- ❖ Human beings are valuable, and organizations' most important resource.
- ❖ Human beings want to be productive.
- ❖ Organizations can support human productive activities.
- ❖ Management is an important activity in supporting human productivity and achieving organizational outcomes.
- ❖ The management of public organizations is no better or worse, or more or less difficult, than that of private organizations, but it *is* different.
- ❖ The individual public manager can make a difference.
- ❖ Public management is a high calling.

COMPETENCIES OF THE WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM

The Wisconsin CPM Program is a competency-based program reflecting the requirements of the National Certified Public Manager Consortium, the accrediting body of all CPM programs. The 7 Core Competencies of the CPM Program are described below. Training in these competencies is included in core and elective classes. A matrix identifying the core competency of each CPM class can be found on pp. 22-23. Detailed descriptions of the corresponding competencies follow on pp. 24-26. Achieving competency in all areas requires you to practice and apply the skills and knowledge taught in each class.

In the required Phase I class, *Management Assessment for Personal Planning and Development*, candidates complete assessments that help them: 1) evaluate their current competency in leadership and management areas, and; 2) develop a professional development plan to address areas to strengthen.

- **Personal and Organizational Integrity**
Increasing awareness, building skills and modeling behaviors related to identifying potential ethical problems and conflicts of interest; appropriate workplace behavior; and legal and policy compliance.

- **Managing Work**
Meeting organizational goals through effective planning, prioritizing, organizing and aligning human, financial, material and information resources. Empowering others by delegating clear job expectations; providing meaningful feedback and coaching; creating a motivational environment and measuring performance. Monitoring workloads and documenting performance. Dealing effectively with performance problems.

- **Leading People**
Inspiring others to positive action through a clear vision; promotes a diverse workforce. Encouraging and facilitating cooperation, pride, trust and group identity; fostering commitment and team spirit. Articulating a vision, ideas and facts in a clear and organized way; effectively managing emotions and impulses.

- **Developing Self**
Demonstrating commitment to continuous learning, self-awareness and individual performance planning through feedback, study and analysis.

- **Systemic Integration**
Approaching planning, decision-making and implementation from an enterprise perspective; understanding internal and external relationships that impact the organization.

- **Public Service Focus**
Delivering superior services to the public and internal and external recipients; including customer/client identification, expectations, needs and developing and implementing paradigms, processes and procedures that exude positive spirit and climate; demonstrating agency and personal commitment to quality service.

- **Change Leadership**
Acting as a change agent; initiating and supporting change within the organization by implementing strategies to help others adapt to changes in the work environment, including personal reactions to change; emphasizing and fostering creativity and innovation; being proactive.

WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM OVERVIEW
(requirements as of September 1, 2011)

The WCPM program consists of three phases, totaling 300 instructional hours.
Phases I and II can be worked on concurrently.

PHASE I: SUPERVISION (72 Hours)

- ***Management Assessment (6 Hours)*** All students enrolled in the CPM program are required to complete the one-day class, "Management Assessment for Personal Planning and Development."

- ***Supervisory Training (60 Hours)*** Currently, the WCPM Program does not offer supervisory training on a regularly scheduled basis. Classes may be scheduled on request. Most students meet this requirement through university credit or non-credit classes, state-sponsored classes, training offered through governmental units, vocational/technical classes and professional training seminars focused on supervision.

- ***Professional Development Plan (2 Hours)***

- ***Written Project (4 Hours)*** Technical writing: A Supervisory Situation

PHASE II: MANAGEMENT (138 Hours)

- ***Management Core Classes (54 Hours)***
  Students are required to take the following nine one-day classes:

  > The Public Management Profession and Environment
  > Strategic Thinking, Planning and Organizational Transformation
  > Productivity and Quality Improvement
  > Problem Analysis and Problem Solving
  > Presenting Yourself to One or Many
  > Ethics, Values and the Public Manager
  > Leadership
  > Executive Writing

- ***Management Program Elective Classes (84 Hours)***
  Students are required to take 14 classes in five categories. These categories are:

  > Quantitative Methods and Tools (18 Hours) Topics include quantitative decision making, research methods, systems techniques, productivity measurement, and others.

  > Public Policy (12 Hours) Topics include policy analysis and implementation, working with elected bodies, media relations, customer/client relations, developing public-private relationships and others.

  > Organizational Management (18 Hours) Topics include organizational goal setting, leading and managing from the middle, team building, change management, having difficult conversations, and others.

  > Resource Management (18 Hours) Topics include budgeting, risk management, time and stress management, program evaluation, project management, and others.

  > Personnel Management (18 Hours) Topics include performance management, conflict management, human resource management, coaching, effective supervision, and others.

Phase II (continued)

- *Monthly Reflective Essays (6 Hours)* Monthly reflective essays after each class.

PHASE III: EXECUTIVE MANAGEMENT (90 Hours)
- *Decision Making Case Studies (24 Hours)* Four days devoted to analyzing and developing cases which synthesize management practices and theory.
- *Class Project (18 Hours)* A group project completed over 6-8 months.
- *Individual Applied Project (18 Hours)* This is an applied project which can be done as a team or individual project.
- *Leadership: Capstone Seminar (12 Hours)* Presentation of project or case study to other class members, and discussion of current topics such as the future of public management or public management challenges.

PROFESSIONAL DEVELOPMENT ELECTIVES (18 Hours) Electives may be general or professionally-specific management classes. Students may choose management classes from the CPM program or classes provided by other approved sources. It is strongly recommended that students arrange prior approval for an elective class not provided by a UW System campus, government unit, or widely-recognized provider. Professional Development Electives may be taken at any time during the program.

COHORT MAKE-UP CLASS PROCEDURE

Candidates enrolled in a cohort group CPM program must complete all classes scheduled in that program to earn the CPM designation. We recognize that scheduling conflicts that cannot be changed sometimes may prevent you from attending a class. In order to allow students to complete the program, despite having missed one or more classes, we have established a substitute-class policy allowing you to take the same or a similar class in our open-enrollment program on the UW-Madison campus at a significantly reduced rate. You <u>must</u> receive permission to be absent from class **prior to** taking a scheduled absence. **Students can only substitute 4 classes during a cohort program.**

The class make-up procedure consists of submitting a Request for Absence form to the CPM office (email sunshine.jansen@wisc.edu), and writing a reflective essay after you've completed the makeup class. The form, and information on accepted substitutes for a missed class, are available on the cohort Canvas site. In the case of Core classes, the make-up class must be the exact class that was missed. Most elective classes may be made up with any open-enrollment class in the same elective category, but be sure to check the upcoming class list on the CPM website as we often offer the same classes to the public.

Important note: Case Studies classes have no equivalent and cannot be made up.

WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM CLASSES
Full list – for reference when selecting "TBD" topic for your cohort

REQUIRED CORE CLASSES

030	Management Assessment for Personal Planning and Development
100	The Public Management Profession and Environment
110	Presenting Yourself to One or Many
120	Strategic Thinking, Planning and Organizational Transformation
130	Productivity and Quality Improvement
140	Problem Analysis and Problem Solving
160	Ethics, Values and the Public Manager
170	Leadership
227	Executive Writing

QUANTITATIVE METHODS ELECTIVES (18 hours required)

200	Exploring and Reporting Your Data
201	Information Technology Issues in the Public Sector
202	Organizational Performance Measurement (Also listed as Class 269)
203	Systems Thinking in a Chaotic World
204	Fundamentals of Project Management (2-day class)
204A	Productivity Tools (Also listed as Class 268)
207	Program Evaluation Techniques
208	Project Governance and Portfolio Management
209	Measuring Customer Satisfaction

PUBLIC POLICY ELECTIVES (12 hours required)

220	Policy Analysis for Non-Analysts
223	Developing Public-Private Partnerships
224	Elements of Digital Style (half or full day class)
225	Media Relations
226	Working with Councils, Boards and Commissions (Also listed as Class 247A)
230	The Conduct of Public Meetings
232	Customer Service as a Strategic Issue (Also listed as Class 246)
238	Improving Public Participation
239	Using Data Visualization and Infographics to Tell Your Story (half-day class)

ORGANIZATIONAL MANAGEMENT ELECTIVES (18 hours required)

240	Managing Organizational Change
242	Resilience and Stress Management Skills
242A	Developing the Emotional Intelligence of Your Organization
242B	Personality Preferences: Understanding Yourself & Others Through MBTI®
243	Leading and Managing from the Middle

246   Customer Service as a Strategic Issue (Also listed as Class 232)
247   Facilitating Effective Meetings
247A Working with Councils, Boards and Commissions (Also listed as Class 226)
248   Communication Styles and the Generations
249   Having Challenging Conversations (Also listed as Class 282)
250   Advanced Problem Solving Strategies
252   Advanced Leadership
253   Appreciative Inquiry
255   Managing in Permanent Whitewater
256   Promoting Diversity in the Workplace
256A Cultural Competency
256B Encouraging a Culture of Civility and Respect

RESOURCE MANAGEMENT ELECTIVES (18 hours required)

260   Risk Management
263   Budgeting for Public Managers
265   Records Management
267   Managing Time, Multiple Priorities and Interruptions
268   Fundamentals of Project Management (Also listed as Class 204)
268A Productivity Tools (Also listed as Class 204A)
269   Organizational Performance Measurement (Also listed as Class 202)
270   Lean Times, Lean Government
273   Preparing RFPs and Bids
275   Writing Effective Grant Proposals

PERSONNEL MANAGEMENT ELECTIVES (18 hours required)

282   Having Challenging Conversations (Also listed as Class 249)
284   Fearless Performance Reviews
286   Strategies for Effective Supervision
289   Team Management and Team Building (Also listed as Class 242)
290   Encouraging a Culture of Civility and Respect (Also listed as Class 256B)
295   Advanced Issues in Conflict Management (Also listed as Class 245)
297   Fearless Coaching

PHASE III CLASSES (Available only to candidates who have completed the Phase I & II requirements)

300   Case Studies in Public Administration (3-4 days)
320   Class Project
330   Individual Applied Project in Public Administration
340   Leadership: Capstone Seminar. Concludes with a graduation ceremony.

POLICIES OF
THE WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM

Note: Not all apply to the cohort format of the program.

ATTENDANCE POLICY   (Adopted 10/27/92)

Candidates in the Wisconsin Certified Public Manager Program are expected to attend the entirety of each class for which they enroll. Those who have unavoidable conflicts may seek to be excused by the instructor. **In no case may instructors grant excused absences for more than one hour** (for a six-hour class).

CLASS WAIVER POLICY   (Adopted 10/27/92)

A candidate may request a waiver of a Phase II required class if the student demonstrates that s/he has successfully participated in an organized educational program of equivalent length and with similar educational objectives. Requests must be made in writing to the director of the Wisconsin CPM Program.

While a class may be waived, its total hour requirement cannot. Another elective class must be taken to replace the instructional hours.

INACTIVE STATUS POLICY   (Adopted 10/27/92; Amended 10/07/05)

Candidates in the Wisconsin Certified Public Manager Program are expected to progress steadily toward completion of the program. Candidates who make no progress in an eighteen month period, without sufficient reason as established by the Program Director, shall be placed on Inactive Status.

A candidate on Inactive Status who wishes to resume participation without starting over in the program may request in writing to the Program Director that s/he be granted permission to return to Active Status. This request must provide reason(s) to regard the individual as current in the subject matter of the CPM classes s/he has taken. Any candidate who has been inactive for more than 5 years will be required to re-enter the program and complete all program requirements (including classes previously taken).

Candidates on Active Status who anticipate personal or professional circumstances that may require postponing CPM activities for as long as eighteen months should so advise the Program Director. The Program Director may, in turn, advise the participant of readings or other relevant materials or activities that may assist the participant in remaining current in the CPM curriculum. However, a candidate so advised must still submit a request to the Program Director should she/he become Inactive and wish to resume Active Status.

GENERAL APPEALS POLICY   (Adopted 10/27/92)

All decisions of the administrative staff of the Wisconsin Certified Public Manager Program can be appealed. First appeal is to the Director of the Program, and must be in writing. If the issue is not resolved to the satisfaction of the candidate and his or her agency, the decisions of the Director can be appealed to the Policy Board. The appeal must be in writing, and should be directed to the Chair of the Policy Board of the Wisconsin Certified Public Manager Program. The decision of the Policy Board is final.

CONFIDENTIALITY POLICY (Adopted 10/27/92)

In accord with the United States Family Educational Rights and Privacy Act of 1974 ("the Buckley Amendment") and Chapter 19 (Section 36) of the Wisconsin Statutes regarding public records, all materials produced by students in the Wisconsin Certified Public Manager Program, and all records regarding student performance in the Wisconsin Certified Public Manager Program are not open to general public review.

The standards for the examination and/or release of student records as set forth by the University of Wisconsin-Madison apply to all student records of participants in the Certified Public Manager Program.

Administrative staff of the Wisconsin Certified Public Manager Program, employed by the University of Wisconsin-Madison, have access to student records in order to maintain those records and manage the program. Copies of all records made at a student's request may be subject to a reasonable fee to cover copying and mailing costs.

Use of student-produced materials in classes or in other public forums is strictly prohibited unless specific written permission is given by the student. That permission must include the names of the materials or documents to be used, and the specifics of the situation or setting in which they are to be used.

MANAGEMENT ASSESSMENT POLICY   (Adopted 1/20/95; amended 10/07/05)

A CPM Candidate must take the Management Assessment class within six months of being admitted to the program. If a candidate fails to take the class, CPM classes taken between that six month period and the completion of the Management Assessment class will not be considered part of the candidate's program.

PHASE I WRITTEN PROJECT POLICY   (Adopted 1/20/95; amended 10/07/05)

A CPM candidate is expected to complete a satisfactory Phase I written project within three months of completing the Management Assessment class. A candidate must satisfactorily complete the Phase I written project prior to scheduling the Phase II take-home examination.

SUPERVISORY TRAINING POLICY   (Adopted 1/20/95)

A CPM candidate must provide evidence that she/he has completed, or is scheduled to complete, 60 hours of supervisory training. If a candidate fails to provide such evidence within one year of admittance to the program, all supervisory training acquired prior to admittance will not be credited toward the candidate's program.

WRITING REQUIREMENT POLICY   (Adopted 1/01/01)

A CPM candidate must complete "Executive Writing" as one of the required ("core") classes in the program. Additional writing classes may be required, based on evaluation of the writing assignments in Phase I.

PROGRAM COMPLETION POLICY   (Adopted 10/07/05)

A candidate has 7 years from the time s/he enters the program to complete all requirements of Phase II. This policy applies to all candidates who entered the program after January 1, 2005.

REQUEST FOR APPROVAL OF
PROFESSIONAL DEVELOPMENT ELECTIVE HOURS
for
The Wisconsin Certified Public Manager® Program

Name: _____

Email Address: _____

Please consider the following as meeting the requirements for Professional Development Elective Hours in the Wisconsin Certified Public Manager Program. The following class was taken while I was a candidate in the CPM Program or **within one year prior to my acceptance into the program**.

- Name/Title of Training _____

- Provider of Training or Name of Conference/Meeting _____

- Date Training Received _____

- Number of Hours Requested _____

- **KEY CONCEPTS LEARNED (Please list 2 - 5):**

- **Please attach copy of agenda or meeting announcement.**

Questions: Call (608) 262-4354 or email: sunshine.jansen@wisc.edu or
write: WCPM Program, 21 N. Park St, 7th Floor, Madison, WI 53715-1218.

PHASE I WRITTEN PROJECT (SUPERVISORY PAPER)

An early requirement of the Wisconsin Certified Public Manager Program is a written report discussing effective supervisory practices. The assignment is to demonstrate your understanding of the fundamentals of good supervision.

There are two alternatives you may choose:

(1)   Description of a supervisory situation in which you were involved. This should be:
•   written from your point of view as a supervisor (first person), and
•   should focus on an issue related to the management and direction of one or more individuals.
•   a project management issue is acceptable only if you discuss the "people dynamic" of the project, e.g., communication issues, conflicts, etc.

If you choose this alternative, your report should include the following sections:
•   Provide context/background for the problem or situation
•   Describe the problem or situation: What happened?
•   Describe the supervisory action you took: What did you do?
•   Describe the outcomes: What happened as a result of what you did?
•   Reflect/Evaluate: If you had to do it over, what would you do the same and what would you do differently? Why?

DO NOT feel that you must describe a moment of glory or demonstrate what a good supervisor you were if you choose Alternative 1. We all have erred, and we have learned from those mistakes. Indeed, the ability to admit to mistakes, examine them, and thereby improve, is the mark of an effective leader.

(2) A reflection on effective supervisory practices. Describe three supervisory situations -- where you either were the supervisor or were supervised -- and what you learned about effective supervision from those experiences. The paper must reflect an understanding of what are current "best" supervisory practices. The paper should not be a description of (or diatribe about) ineffective supervisory practices. Rather, if you discuss an ineffective practice, focus on what might have been a more effective practice.

For either option you can consider issues such as: performance appraisals; disciplinary actions; delegating responsibility; planning strategies; disruptive or difficult employees; service delivery problems; or productivity.

You can find a guide that will help you write a better paper on the cohort Canvas site. Even if you regularly write reports, read this guide, if only to refresh your memory on important points of writing conventions, organization, and word choice. This is not a comprehensive guide to technical or report writing; the resources listed at the end of the guide can give you more assistance.

Some technical details:
•   Do not not use the name of your agency or the name of any individual. Create a fictitious agency name and staff it with imaginary people. While all your work products are protected by student privacy law, and we hold all projects in confidence, guarding anonymity in this type of writing is accepted practice. If you attach a report or form (for example, of a disciplinary action), be sure to remove or mark out any names or identifying agency symbols.
•   Your paper should be approximately 10 pages long (double-spaced). This is only a general guideline. If you find your report is much longer or much shorter, read through the guidelines and the manual for the report again to be sure you have covered what needs to be presented in a clear, coherent, and concise manner.
•   Be sure to:
    o   Include your name and "Supervisory Situation Paper" at the top
    o   Identify if you are choosing Alternative 1 or Alternative 2

If you are not sure whether a topic you have in mind is appropriate, we recommend you contact us before beginning the report. We also encourage you to call or email if you have any questions as you write the paper.

We will read your paper for content and form and will return it with feedback. You cannot "fail." If revisions are required, we will work with you until you have completed the assignment successfully. In some rare cases we may recommend that you take a more extensive writing course, either at your local technical college or through a university.

PERSONAL PROFESSIONAL DEVELOPMENT PLAN

As a part of the Management Assessment class, you had the opportunity to assess your strengths and limitations in a variety of areas, both personal and professional. You may also have identified other competencies, skills or characteristics you believe you need in order to be a better public manager.

A requirement of the Wisconsin Certified Public Manager® Program is that every candidate prepare a personal professional development plan. This is an action plan that uses the results of the program assessments you completed, as well as other assessments of your professional strengths and weaknesses. Writing a personal development plan allows you to focus on what you need to emphasize in your broader career strategy. Use this opportunity to develop an objective, long-range plan for your professional life.

Your plan need not be long, but generally are at least 2-pages (double-spaced).

Your plan needs to address *each* of the following four areas:

[1] Identify a long-range goal(s). You may define long-range as it fits your needs (e.g., 5 years, 10 years, etc.) Your goal may be a specific position (e.g., "department head"), skill acquisition, or an achievement.

[2] Identify your current strengths and areas you would like to improve. Explain which of these strengths will help you reach your long-range goal(s) and which areas you need to develop further (knowledge and skills) to successfully accomplish your goal(s).

[3] Create a professional development action plan to develop *each* of the areas (knowledge and skills) you identified you need (#2 above) to achieve your long-range goal(s). You may do this in narrative form or as a spreadsheet or table. Whichever format you use, include the following:
    A) Specific area for development (e.g., improve active listening skills).
    B) Strategies you will use to develop the knowledge and/or skills (e.g., register for specific classes not offered in the CPM cohort, take training offered by your agency/organization, pursue mentorships, attend professional organization events, read books, etc.).
    C) Milestone dates for completing each strategy.
    D) Measures of success that will help you chart your progress towards accomplishing your professional development action plan. These measures should be substantive benchmarks that help you evaluate to what degree you have acquired the knowledge and skills you have identified. For example, "Increased percentage of times I correctly paraphrase what others say" is a more effective measure of success for "Improve active listening skills" than "Attend a workshop on improving active listening skills."
    E) Methods for collecting the information for measures of success (e.g., tally the number of times I correctly and incorrectly paraphrase what others say in a meeting).

If you have any questions, please don't hesitate to contact Chrys Mursky (608-262-3830/ chrystyna.mursky@wisc.edu). Remember, although this plan is a program requirement, it is intended to serve your needs, not ours.

PHASE II MONTHLY REFLECTIVE ESSAYS

The National Certified Public Manager® Consortium requires that programs evaluate whether candidates have learned the material taught in the program; the method of evaluation is at the discretion of the program. The Wisconsin CPM Program has chosen to use both projects and reflective essays to evaluate candidate learning. This document explains the process for submitting and evaluating reflective essays.

Essay requirements:
Each month you will write 2 pages of reflection.
For each day of class, submit one page (1.5 or double spaced, 11-12 pt font). A 2-day class, e.g., Managing Projects, requires a 2-page essay.

For each essay:
- Put your name, title of the class, class date, and name of your peer reviewer at the top.
- Discuss briefly what you learned in each class, experiences you've had that relate to the information provided in the class, how you will apply what you learned in your work, and any questions you may still have.
- Both a cohort member (see separate schedule) and CPM program staff will provide feedback.

Google Drive and folders:
We have set up a shared Google Drive for these monthly essays. Each class has a separate folder. You will post your reflections and comments directly in a Google Doc. Please see the *Tips for Posting Reflective Essays and Providing Peer Feedback* handout for more information on using Google Drive for this assignment.

PHASE III OF THE WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM

Phase III consists of four parts:

A. Case Studies. Four days of case studies, based on the Harvard University model of teaching public administration. These cases are drawn from the public and private sectors, and from all professions within the public sector, so as to provide a broad overview of issues and management methods. The purpose of the case studies element is to assist candidates in bringing together and applying management information received in a variety of training and development activities. Each candidate will be expected to present and lead the discussion for one case.

B. Class Project. Completed over a 6-8 month period. Provides the class with an opportunity to apply managerial skills and knowledge to a real-world management situation in a collegial team effort. The project should result in action that contributes to the improvement of a public or non-profit organization. The project may be assigned by CPM administration or chosen by the class. It may involve a number of individual or small-group activities, but should be coordinated towards the single end or purpose.

C. Applied Project. A written individual project or an applied small group project, requiring the application of information learned in the CPM Program in an administrative or management problem. The project will be negotiated with individuals or groups of two or three.

D. Leadership Seminar. In this two-day seminar candidates present their projects to others in the class. The seminar also includes discussion of critical issues in public administration. The seminar concludes with a public graduation ceremony.

Note: Professional Development Electives are also listed as a part of Phase III. However, these electives, which are an opportunity for candidates to receive training specific to their careers, may be taken at any time during the individual's participation in the program.

The overall purpose of Phase III is to synthesize information received in the CPM Program, to allow candidates to demonstrate their understanding of a broad range of management subjects, and to build collegial professional relationships among members of the program.

**WISCONSIN CERTIFIED PUBLIC MANAGER PROGRAM GUIDELINES FOR PHASE III
CLASS PROJECT**

The purpose of the class project is to provide the class with an opportunity to apply managerial skills and knowledge to a real-world management situation in a coordinated team effort. The project should result in action that contributes to the improvement of a public or non-profit organization.

The project will be chosen by the group or assigned by CPM administration. It may involve a number of individual or small-group activities, but should be coordinated towards the single end or purpose.

It will relate to CPM course content, and respond to real organizational needs. In defining the scope of the project, the class should determine that:

- The project will contribute to the effectiveness of the organization
- The project will involve the senior management or leadership of the organization
- The project is complex enough to involve all class members
- The project uses the talents, skills and knowledge of all class members
- The project will be completed in the time available

Follow these steps in the class project:

1) <u>Create</u> the project charter and secure the commitment of all class members.
2) <u>Use</u> project management tools and skills to plan the project's activities and assignments.
3) <u>Identify</u> a project manager – a class member who is willing to supervise the project, ensuring that deadlines are being met and responsibilities fulfilled.
4) <u>Work on</u> the project.
5) <u>Provide update</u> to the CPM office.
   <u>3 months</u> after start of Phase III: provide update on actions taken and progress made on planned tasks and activities. Report on any unexpected difficulties encountered, and successes experienced, and any significant changes in the project.
6) <u>Complete</u> the project
7) <u>Complete</u> a final project report to present to the CPM administration and client organization, approximately one month before graduation.

   The report should:
   1. reflect the process by which the project was identified and implemented
   2. the responsibilities and accomplishments of individuals and sub-groups within the class
   3. the accomplishments of the project as a whole
   4. any work not completed
   5. lessons learned.

In addition, provide a final evaluation of the project including:
   1. how well the group worked together
   2. the extent to which the group achieved its objectives,
   3. a statement by the leadership of the organization where the project was completed.

WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM
GUIDELINES FOR PHASE III INDIVIDUAL APPLIED PROJECT

I. Introduction
The purpose of this project is to provide you, as a Wisconsin Certified Public Manager candidate, with the opportunity to apply problem solving and decision making skills to an actual work situation. This is to be an applied project that translates what has been learned in the CPM program into real-world application.

The Phase III project is designed to allow you to study and recommend or take action on an issue or problem in a public organization. The project should contribute to the improvement of the organization.

The project may be done as an individual or group project. For a group project the activities and responsibilities of each group member must be defined clearly. Individuals may select a project in their own agencies or may work with a public administrator who has a special project appropriate to the purpose of the CPM program.

II. Selection of Applied Project Topic
The topic of the project should be selected on the basis of individual interests, possible future use to the organization, and relationship to CPM program course content. The topic selected should be one that can be completed within allotted time.

Use the following questions to assist you in selecting your topic:
1.   Is the topic important to your organization? Will it contribute to your organization's effectiveness?
2.   Is there sufficient information available for the project, or can you generate the data necessary? Is or will the information be reliable?
3.   Can you secure the cooperation of individuals necessary for the project?
4.   Is it possible to implement any conclusions or suggested solutions which you develop?
5.   Do you have sufficient time to complete the project?

III. Steps
Follow these steps in carrying out your project:
1.   Identify a problem that management faces; a problem which needs study, analysis and action; or a product which needs to be developed. This problem or project may involve any or all aspects of management.
2.   Complete the project approval form and return to the CPM office before you begin to work on the project. (See attached)
3.   Complete the project.
4.   Write a report (general guideline: 20 double-spaced, typed pages) Your written report **must** contain each of the following elements: Title abstract; Table of Contents; Main body of paper, including a description of the organization, agency or governmental unit involved, a description of the problem or issue, an analysis of the core problem, a description of the methods used in carrying out the project or completing the product, a description of the alternative solutions to the problem, and a description of the outcome of the project or the solution recommended (with projected outcomes). If you developed a product, present the product here.
5.   Send the report to the CPM office, at least six weeks before the final session/graduation.

IV Evaluation
The CPM office will review the project report using the following evaluation guidelines. An unacceptable report will be returned to you for revision. Generally, projects are returned because they fail to meet one of the evaluation guidelines.

1. Is the project paper well organized?
2. Is a problem or the need for the product clearly identified?
3. Are appropriate analytical tools used? Is the analysis complete? Are appropriate management/leadership principles exhibited (as taught in CPM classes)?
4. Is information accurate and up to date?
5. Is there a conclusion or solution or recommendation? Does this flow logically from the problem identification and analysis? Are effective decision-making approaches evident? Is the product as presented clear and understandable?
6. Is the project presented well (does it look professional)? Does the writing meet acceptable professional standards (correct grammar, punctuation, spelling)?

You will be informed if your project is accepted or if modifications or corrections are required. The CPM office also may provide some guidance, in your acceptance letter, regarding how your project should be presented at the final class session. These suggestions are for guidance only; your presentation will not be evaluated by the CPM office or by instructional staff.

As you develop your project proposal, carry out the project, and prepare the project report, keep in mind the top ten weaknesses of projects:

1. Need for project or product not defined.
2. Process for researching need not described.
3. Need not demonstrated or supported: insufficient data, no data, opinion data, etc.
4. Relation between data and recommendations or product is missing, incomplete, vague or unclear.
5. General or vague recommendations; incomplete product.
6. Lack of an implementation plan for project, or dissemination plan for product.
7. Failure to take into account the authorizing environment.
8. Report written so cannot be distributed (e.g., confidential information).
9. Report written so project cannot be implemented (e.g., too expensive, no executive support, inappropriate recommendations, inappropriate timeline).
10. Report written in an unprofessional manner (e.g., language, grammar, etc.).

APPROVAL REQUEST

FOR: Phase III Individual Applied Project

FROM: _____

Proposed Title of Project: _____

Brief description of the project including key areas of concern ("problem") which to be addressed: **You must begin with a problem statement**, e.g., The Dept of X consistently fails to meet its production goals which results in decreased service to its customers.

What benefits do you hope to achieve by engaging in this project? For example, are you seeking to reduce cost, increase revenues, improve efficiency or enhance customer service? How will your project contribute too the organization's effectiveness?

How/where will you collect or generate information for the project?

With whom will you work in developing the project?

Process by which you will conduct your project, including a timeline:

Management practices which you expect to use in the process:

Will you or your agency be able to implement this project? If not, will the project provide helpful information? (Please be specific in your response.)

How will you know if your project is successful?

Approved by _____ Date _____
                        CPM Program Director

Comments/questions/concerns:

Attach a copy of this approved proposal to your final project paper.

SERVICE-LEARNING:
An Alternative Choice for the CPM Phase III Individual Applied Project

Candidates for the Wisconsin CPM designation may elect to engage in a service-learning project in order to fulfill the requirements of the Phase III applied project. Below are some details about this alternative.

What is a service-learning project?
Service-learning is an opportunity for you to apply your management skills and knowledge to an organizational or community setting other than the one in which you are employed. Service-learning involves both the service itself, and a reflection upon that service; the goals of service-learning are achieved through both the service and the reflection.

Is service-learning the same as community service?
While service-learning involves service in the community, it has two distinct characteristics. First, it is the application of specific skills and knowledge in a community situation; it identifies in advance, and tracks, specific learning objectives and goals. For example, a CPM candidate would apply specific skills or knowledge learned through the CPM program. Second, service-learning involves examining yourself in relation to the agency and your community, through the reflection process.

How does service-learning differ from the "standard" CPM applied project?
Most CPM applied projects are conducted in a candidate's agency, or in the agency of another class member. Service-learning projects are conducted in community agencies or settings other than where the candidate is employed. In addition, the typical "product" of an applied project can be demonstrated or defined: a manual, a new process, a plan, etc. The "product" of a service-learning project is a journal, describing both what you have done with the agency or organization and how you are feeling about that experience.

If I'm interested, what should I do now?
Because service-learning is a new venture, it's important to contact the CPM Office as soon as possible to indicate that you're interested in this approach. We will want to talk to you more about your interest, and next steps. If you think that service-learning is an approach you would like to try, you will need to:
1) Identify a community agency or organization with which you would like to work.
2) Reach a tentative agreement with that organization about what you can contribute. Discuss, as well, mutual expectations, including time commitment.
3) Discuss this with your supervisor. (You may want to do this before you talk to the community agency.) Describe what you hope to do and accomplish. If you believe you will need work release time to assist the community organization, ask for your supervisor's support.
4) Discuss your progress with the CPM Office; seek their help if you have questions.
5) Develop a "contract" with the community agency. The CPM Office will assist you in developing this document.
6) Provide a copy of the contract to the CPM Office. Be sure to review the guidelines for keeping a journal before you begin the project.

How will I conduct my project?
Each service-learning project may be unique. The details need to be worked out between you and the organization. As you carry out the project, you will need to keep a journal of what you have done or are doing, and your reflections on that. There is no firm requirement as to the number of hours you will spend on your project, but you should plan on spending no less than 40 throughout the project period (not including journaling time).

What will be required of me in order to pass the project requirement?
You will need to submit your journal, along with a summary reflection of what you have done. We also encourage you to include letters from agency representatives that reflect on your work.

Here are some examples of service-learning:

1. Assist a non-profit agency in developing a budgeting process.
2. Work with a community group on strategic planning.
3. Assist a community organization in evaluating and analyzing its functioning.
4. Work with a community organization to develop a manual of operations or a personnel manual.
5. Create and conduct workshops for an organization, or for a client group of the organization. (For example, on conducting needs assessments, or on developing fair housing guidelines and options.)
6. Assist a non-profit agency in developing and submitting a grant.
7. Work with a school/classroom teacher on government-related curriculum.
8. Develop a marketing plan for an agency.
9. Develop an employment plan for an agency, including recruitment, selection and orientation procedures.
10. Plan a leadership development program for an agency, or for its clientele.

There are numerous other opportunities and options. The CPM Office believes that service-learning both demonstrates a candidate's competence <u>and</u> provides visible, meaningful service to the community. We believe this approach will be rewarding for all involved.

Guidelines for Your Service-Learning Journal

[We recommend you purchase a journal especially for this project, rather than relying on individual notebook paper, where pages can become lost. You can purchase a simple, spiral-bound notebook or a fancier, bound notebook – as long as you can keep everything in one place.]

1. Your initial entry in your journal should identify what you are planning to do, with whom, and any other pertinent details. Record as well any thoughts you have about the project, including both expectations and concerns.

2. Each time you spend time at the agency you should have a journal entry. This should describe what you did, people with whom you met, what happened (or didn't happen), concerns or pleasant surprises, people with whom you worked, etc. A journal entry should be at least one page long. You can add charts, graphs, or illustrations if you wish.

3. You may also choose to do a journal entry at times other than when you have spent time at the agency. For example, you may be thinking about a problem you've encountered at the agency and wish to write down your thoughts. Or you may have attended a seminar where you gained an idea or insight that might be helpful. This kind of journal entry can be shorter than the standard journal entry (or it could be longer!).

4. As you are closing out your project, you should write a final journal entry that summarizes your experience. This is different from the summary reflection, a longer written product (recommended, 3 to 5 pages) that you will submit separately.

As with all other student-generated work, your journal is considered confidential, and its contents will not be shared with anyone outside of the CPM Program office without your express written permission.

Appendix: Competencies of the Wisconsin Certified Public Manager® Program

Competency Area	Competency – Your ability to:
1. Personal and Organizational Integrity	1.1. Promote high standards of honesty, integrity and ethical practices in your organization.
	1.2. Apply organization policies in a consistent manner, and ensure legal and policy compliance
	1.3 Use power, authority and influence appropriately to achieve department/office goals
2. Managing Work	2.1 Apply performance management and evaluation practices in your organization to ensure that results of work are monitored and measured for desired outcomes.
	2.2 Track program or activity results and take corrective action when necessary.
	2.3 Employ effective and creative problem-solving approaches and productivity tools.
	2.4 Describe processes and procedures required to prepare RFP's and administer contracts.
	2.5 Describe financial management processes, including budget preparation and monitoring, and purchasing, procurement and grant management.
	2.6 Recognize and use good practices in managing people, including recruiting, training, development and evaluation of staff; feedback, coaching and mentoring; discipline; and succession planning.
	2.7 Summarize the labor relations process including the steps in discipline and grievance.
	2.8 Evaluate and recommend the use of technology including the training of staff, performance impacts and potential of new technology.
	2.9 Discuss issues in risk management and insurance in the public sector.
	2.10 Identify what is a public record, and effective public record management techniques.
	2.11 Practice effective management, improvement and redesign of work processes and systems.
	2.12 Describe multiple project management methodologies, and tools that are used in the project life cycle.
	2.13 Analyze your organization and other organizations, and assess the need for organizational changes.
	2.14 Relate effective management processes necessary in times of crisis, emergency and chaos.
3. Leading People	3.1 Use a range of oral communication skills effectively including communicating ideas and facts clearly, adjusting style to audience, active listening, and considering the impact of words and actions.
	3.2 Describe the relationship between your organization and the media, and outline the organization's media relations plan
	3.3 Use effective written communication skills including critiquing the writing of others.
	3.4 Apply negotiating skills including appropriate approaches for finding mutually acceptable solutions to problems or conflicts in the workplace and with governing bodies and gaining cooperation from others.

Leading People (cont'd)	3.5 Develop and sustain effective partnerships, networks and coalitions inside and outside your organization.
	3.6 Assess and apply the principles of emotional intelligence.
	3.7 Apply a decision making model in order to make well-informed decisions in a timely and responsive manner.
	3.8 Demonstrate the use of data banks, statistical measures, and research and survey data in decision making and customer service.
	3.9 Describe the elements of an effective program evaluation, and the role of the manager in ensuring an effective process and the use of the evaluation's findings.
	3.10 Differentiate between various conflict management skills and demonstrate their application.
	3.11 Evaluate how your organization demonstrates and supports respect for diversity and inclusiveness.
	3.12 Describe the characteristics of a team and construct and support an effective team
	3.13 Demonstrate the necessary steps in conducting a successful meeting, including Open Meeting Law regulations.
	3.14 Identify characteristics, behaviors and practices of effective leaders.
	3.15 Describe and manage power, influence and politics in and for your organization at various levels.
	3.16 Practice collaborative development of an organizational vision.
	3.17 Defend and promote the organization's vision and mission.
	3.18 Describe and demonstrate effective supervisory practices.
4. Developing Self	4.1 Summarize your personal styles, behaviors, preferences and values.
	4.2 Use effective interpersonal skills, showing sensitivity and respect for others, being responsive to their needs and abilities, and providing constructive feedback. .
	4.3 Evaluate your impact on others, including your cultural competence
	4.4 Create a professional development plan and invest time and energy in self-development and professional growth.
	4.5 Describe issues related to governmental liability, and the public official's role in a civil lawsuit.
	4.6 Define how to manage time and stress, establish personal boundaries and recognize the potential for role conflict.
	4.7 Demonstrate personal job/content expertise and explain job expertise required by those working in your unit.
	4.8 Maintain awareness of developments in your field – technological, managerial, legal, socioeconomic, etc.
	4.9 Explore how your values, behavior and communication style impact everybody with whom you interact.
5. Public Service Focus	5.1 Explain the historical roles, purposes and spirit of public service in a democratic society, including the tension between professionalism and democracy.
	5.2 Compare public and private management and identify opportunities for shared or collaborative functions.

5. Public Service Focus (cont'd)	5.3 Describe effective approaches to identify and provide service to clients, customers, program users, the community and program sponsors.
	5.4 Identify specific methods for public participation, the strengths and weaknesses of each, and appropriate ways to use public feedback.
	5.5 Demonstrate the commitment and ability to provide and improve quality public service.
	5.6 Describe the political, cultural and legislative influences that shape public management.
	5.7 Explain the policy analysis process and demonstrate analytical techniques.
6. Change Leadership	6.1 Recognize and promote organizational change.
	6.2 Adapt to changes and setbacks and adjust to new situations.
	6.3 Manage conflict arising from organizational change.
	6.4 Promote innovation and creativity in your work setting.
	6.5 Manage multiple tasks or projects without losing focus.
	6.6 Assess what behaviors and skills need to be learned and what habits need to be unlearned within your organization to foster a culture of respect and civility
7. Systemic Integration	7.1 Describe the workforce planning process and develop a workforce plan for your unit or agency.
	7.2 Engage in and promote long-range thinking and planning for your whole organization.
	7.3 Adjust strategic plans in response to changes inside and outside the agency.

WISCONSIN CERTIFIED PUBLIC MANAGER® PROGRAM: Class/Competency Matrix Sorted by Class

Class #	Class Title	Primary Competency	Secondary Competencies
030	Management Assessment	4.1	4.2, 4.3, 4.4
100	The Public Management Profession and Environment	5.1	5.2, 5.6
110	Presenting Yourself to One or Many	3.1	3.2
120	Strategic Thinking, Planning & Organizational Transformation	7.2	2.11, 2,13, 3.16, 3.17
130	Productivity and Quality Improvement	2.11	2.1, 2.2
140	Problem Analysis and Problem Solving	2.3	3.7
160	Ethics, Values and the Public Manager	1.1	1.2
170	Leadership	3.14	4.2
200	Exploring and Reporting Your Data	3.8	
201	Information Technology Issues in the Public Sector	2.7	
202/269	Organizational Performance Measurement	2.1	2.11
203	Systems Thinking in a Chaotic World	2.11	2.14
204/268	Fundamentals of Project Management	2.12	
204A/268A	Productivity Tools	2.11	2.12
207	Program Evaluation Techniques	3.9	
209	Measuring Customer Satisfaction	3.8	
220	Policy Analysis for Non-Analysts	5.7	
223	Developing Public Private Partnerships	3.5	
225	Media Relations	3.2	
226/247A	Working with Councils, Boards or Commissions	3.4	
227	Executive Writing	3.3	
229	Advanced Issues in Ethics	1.2	
231	The Conduct of Public Meetings	3.13	
232/246	Customer Service as a Strategic Issue	5.3	5.5
238	Improving Public Participation	5.4	
239	Using Data Visualization and Infographics to Tell Your Story	3.8	2.1
240	Managing Organizational Change	6.1	6.2, 6.3
242/289	Team Management & Team Building	3.12	
242A	Developing the Emotional Intelligence of Your Organization	3.6	
242D	Resilience and Stress Management Skills	3.6	4.6
243	Leading and Managing from the Middle	3.15	1.3, 3.18

245/295	Advanced Conflict Management	3.10	
247	Facilitating Effective Meetings	3.13	
248	Communication Styles and the Generations	4.2	3.11
249/282	Having Challenging Conversations	3.10	
250	Advanced Problem Solving Strategies	2.3	
252	Advanced Leadership	3.16	3.14
253	Appreciative Inquiry	2.3	
255	Managing in Permanent Whitewater	2.14	
256	Promoting Diversity in the Workplace	3.11	
256A	Cultural Competency	3.11	
256C/290B	Encouraging a Culture of Civility and Respect	4.9	6.6
259	Healthy Boundaries	4.6	4.2
260	Risk Management	2.9	
263	Budgeting in Public Management	2.5	
264	Financial Planning	2.5	
265	Records Management	2.10	
267	Managing Time, Multiple Priorities, and Interruptions	4.6	
270	Lean Times, Lean Government	2.11	
273	Preparing RFPs and Bids	2.4	
275	Writing Effective Grant Proposals	2.5	
284	Fearless Performance Management Reviews	2.1	
286	Strategies for Effective Supervision	3.18	3.14
290	The Art of Delegation	3.18	2.2, 2.6, 3.12
297	Fearless Coaching	2.6	
300	Phase III	3.7	