**NCPMC Accreditation Standards**

**Program Accreditation Review Checklist**

**Program under evaluation: California Date: 8/17/2023**

**Evaluator’s Name: Randy Harrison, Review Committee Chair ; (RWH) Lisa Chenofsky Singer, CPM Instructor (LCS); and Tracy Watterson, CPM Graduate (TW)**

**Evaluator’s Role:** [x]  **Review Committee Chair** [x]  **CPM Graduate** [x]  **CPM Instructor**

**Standard 1: Mission and Public Service**

The program has a program specific mission statement? [ ]  Yes [x]  No

Does it guide public service performance expectations? [x]  Yes [ ]  No

Is there a method of program operations and performance evaluation? [x]  Yes [ ]  No

Evaluator’s Comments:

(RWH) The Mission/Purpose statement guides the Centre for Organization Effectiveness (Centre) which houses the CPM Program. The Centre does not have a program specific mission statement, however the Mission/Purpose statement is consulted/revised as part of the Centre’s annual strategic planning process and because the Centre is integrated operationally, the Centre’s Mission Statement supports and guides the CPM Program.

The Centre has a unique governance structure. The Board of Directors governs the Centre and also serves as the Advisory Committee for the CPM Progtram. The Centre is legally structured as a California Joint Powers Authority composed of the City of San Diego and the San Diego County Water Authority. The agreement creates a “central entity for the purpose of providing academies, forums and seminars, and facilitaton and consulting services, management development, organization development and training to municipalities, municipal agencies, special districts and nonprofit organizations, all to raise the caliber of leadership in these organizations” (p.3)

Items of Note:

(RWH) Public service guidance drives expectations and performance evaluation through systematic client and participant consultation, program change and redesign to meet new needs and challenges. The program sponsors an annual Symposium inviting Alumni to a day long program and discussion for feedback. Programs are evaluated using direct consultation with participants and data gathering at all levels of program delivery, and a QR Code is used at the end of each module for participant evaluation records. Program evaluation documentation includes the Annual Report, and sample evaluations covering all aspects of the program and support services.

(TW) Public service performance expectations are reflective of both best practice (e.g., emotional intelligence, coaching) and current needs (e.g., hybrid work environments). Evaluations use qualitative and quantitative data in a variety of modalitites.

(LCS) It is interesting that the Centre aligns with International Coaching Federation (ICF) coaches, ethics and guidelines. Appreciate that there are 2 facilitators in the classroom to benefit the delivery of the program effectiveness. Loved that Sommer Kehrli referenced the use of Marcus Buckingham’s research and the Centre’s development of 2 assessments, especially the Storytelling one which is unique. The Strengthsfinder assessment was referenced by three graduates of the program.

Suggestions for Improvement (if any):

The CPM Program may want to consider a separate mission statement for the program.

**1.1 Mission Statement. Evidence could include but is not limited to:** mission statement, interviews with stakeholders about development and implementation of the mission statement and about use of the mission statement to set priorities, develop programs and curricula, establish learning outcomes, and allocate resources.

**1.2 Performance Expectations. Evidence could include but is not limited to:** Review of brochures, handbooks, flyers, website information; planning documents; logic models and environmental scans; and interviews with stakeholders to discuss expectations for alignment of the mission and goals with the program.

**1.3 Program Evaluation. Evidence could include but is not limited to:** The most recent Annual Report; evaluations of the program; survey results from alumni, employers, and focus groups; and Interviews with stakeholders about program improvement processes and about improvements to the program.

**The program adequately meets Standard 1: Mission and Public Service** [x]  **Yes** [ ]  **No**

If no, then please explain your concern here:

Click or tap here to enter text.

**Standard 2: Core Competencies**

Are the CPM Core Competencies adequately addressed across the curriculum? [x]  Yes [ ]  No

Does the program consist of 300 or more hours of structured learning activities? [x]  Yes [ ]  No

Does the program have a public management project (capstone) that
includes a written component? [x]  Yes [ ]  No

Does the public management project benefit their organization? [x]  Yes [ ]  No

Evaluator’s Comments:

(RWH) The Centre CPM program uses a three-tiered phased approach: The first tier is completion of the Supervisor Academy, the second tier is the Management Academy, and the third tier is the completion of the Leadership Academy. The Leadership Academy builds on tier one and two academies by putting the knowledge gained in those previous sessions into practice, culminating in a capstone project that has an impact on their organization or community. The Leadership Academy focuses on public sector topics that align with the current industry trends, challenges, and needs of today.

(RWH) The Centre has developed a set of policies which which promote effective management and operational support. The policies link the CPM Program with the Centre’s mission.

(RWH) The Centre’s CPM curriculum is designed using 18 competencies which align with the National CPM competencies. The 18 competencies provide connectivity, flexibility and currency with the basic 7 competencies of the National CPM requirements. The 300 hours of structured learning activities is exceeded by the full integration of the academies: Supervisors Academy (40 hours); Management Academy 100 hours, Leadership Academy 110 hours, and the Capstone Project (50 hours). The Center uses feedback tools integrated into the learning experiences including the Science of Story Telling and the Competency Instrument – all for 360-Degree Feedback Assessment.

(LCS) The Centre offers structured learning following the 7 competencies of the National CPM program. Based on the discussions held for the virtual on-site review, it is clear that the staff, facilitators and students/graduates all focus on their integration of knowledge through interactive exercises, engaging discussions, speakers and assessments. The concept of the “Red Thread” and the role of the facilitator to weave the content with real life situations in the classroom and with the everyday lives of the participants came across clearly when in discussion with the facilitators we spoke with.

Items of Note:

(LCS) The Centre’s competencies plays into the 7 competencies of the CPM program requirements and beyond.

(TW) The Curriculum demonstrates work applications and personal development.

Suggestions for Improvement (if any):

Click or tap here to enter text.

**2.0 Core Competencies. Evidence could include but is not limited to:** Documentation of core curriculum and learning outcomes and of core curriculum and competencies; sample capstone projects; policies and procedures; brochures; handbooks; flyers, website information; interviews with stakeholders—participants, Faculty/Instructors, employers about the curriculum.

**2.1 Competencies Addressed in Curriculum. Evidence could include but is not limited to:** brochures, handbooks, flyers, website information; policies and procedures; sample capstone projects; sample assessments, evaluations and, tests; interviews with stakeholders.

**2.2 Examinations and Projects. Evidence could include but is not limited to:**  Sample capstone projects, assessments and tests; policies and procedures manual; interviews with alumni who submitted exceptional projects (possibly Askew Award winners).

**The program adequately meets Standard 2: Core Competencies** [x]  **Yes** [ ]  **No**

If no, then please explain your concern here:

Click or tap here to enter text.

**Standard 3: Resources and Capacity**

Does the program adequately document the adequacy of its resources and
capacity to fulfill its mission? [x]  Yes [ ]  No

Does the program have policies and procedures that promote effective
management and operation of the program in a sustainable manner? [x]  Yes [ ]  No

Do the policies provide guidance linking administrative
procedures to the mission? [x]  Yes [ ]  No

Does the program utilize instructors who can demonstrate academic or
professional experience to be qualified for the content they teach? [x]  Yes [ ]  No

Does the program have a governing or advisory group guiding policy,
recommendations, and potential clientele? [x]  Yes [ ]  No

Evaluator’s Comments:

(RWH) Meetings and surveys help analyze the market of cities, counties and other pubic agencies, and it remains strong. The Centre Board also serves as the CPM Advisory Board. The CEO reports to the Centre Board and coordinates with the Training Programs Manager to implement the CPM program with Centre staff and contract consultants/facilitators.

(LCS) Advisory Board – consider adding members beyond their service borders. Colleague, Tracy Watterson (VT) asked about considering Focus Groups instead of an Advisory Board which resulted in an Interesting discussion.

(LCS) The Centre is self funded, which affords this program flexibility and the opportunity to deliver a very high touch service as not restricted by university or city/state operational processes. The Centre includes meals, guest speakers and is coordinated by a professional at the Centre. Impressive resources.

Items of Note:

(RWH) The Centre is totally supported by fees for service. The bylaws require a balanced budget annually, review of financials quarterly, review and maintenance of accounting policies and procedures, and conduct of an annual financial audit by an external auditor. CPM-specific policies and procedures ensure program quality including eligibility, admission, funding (fee for service only), equivalency of prior training for CPM credit, college credit information, tracking of participant development, confidentiality and privacy rights of participants, and an integrated Advisory Board structure.

(RWH) Faculty instructors combine excellent experience in the the public sector and educational background with expertise in specific content in the module they teach. This is supplemented with special guests for insight on key issues or leadership trends. The Centres academies incorporate a collaboration with an Academy Facilitator assisting the delivery of the curriculum content while serving as a process expert to guide learners toward achieving specific goals and outcomes to maximise learning opportunities. A CPM Curriculum Team is composed of the Centre CEO/CPM Program Manager, Director of Growth and Development, Training Programs Manager, Program Facilitiators and subject matter experts for each course module. Each of the CPM Program Facilitators and module instructors are engaged in curriculum, design, evaluation, feedback and changes.

(RWH) The members of the CPM Curriculum Team also serve as the CPM Advisory Committee. The Centre is in the process of building a sub-committee of the advisory Group to support the CPM Program across California composed of active and past public sector leaders and experts to monitor needs and trends in the public sector, evaluate content and program requirements, and support marketing and branding.

Suggestions for Improvement (if any):

Click or tap here to enter text.

**3.0 Program Resources. Evidence could include but is not limited to** Documentation of resources showing alignment with the mission, goals, objectives and outcomes, for example, a Logic Model. Tour of the physical facility, budget documentation, brochures, website etc., interviews with participants and Faculty/Instructors about the adequacy of resources and capacity.

**3.1 Administrative Infrastructure. Evidence could include but is not limited to:** Policies and procedures; interviews with institutional and program leadership; observation of modalities used in the program (for example, access to on-line platform and/or observation of a classroom)

**3.2 Faculty/Instructors. Evidence could include but is not limited to** Documentation of Faculty/Instructors, including name, address and area of expertise (A list of the Faculty/Instructors and their bios is available); brochures, handbooks, flyers, website information.

**3.3 Administrative Policies and Procedures. Evidence could include but is not limited to** flyers, brochures, website and policies and procedures manual; confidentiality statement.

**3.4 Funding. Evidence could include but is not limited to:** documented budget**;** interviews with both institutional and program leadership. A copy of the budget will be available for review.

**3.5 Advisory Group. Evidence could include but is not limited to:** Documentation of advisory board members/group and their meetings, including name, address and area of expertise; brochures, handbooks, flyers, website information, interviews with advisory board/group members.

**The program adequately meets Standard 3: Resources and Capacity** [ ]  **Yes** [ ]  **No**

If no, then please explain your concern here:

Click or tap here to enter text.

**Standard 4: Planning and Implementation**

Does the program engage in ongoing, participatory planning that provides direction for the institution and leads to the achievement of intended outcomes for programs and services? [x]  Yes [ ]  No

Are the program’s planning and implementation processes sufficiently flexible to address
unexpected circumstances while maintaining the program’s rigor and viability? [x]  Yes [ ]  No

Are participant records held securely and confidentially? [x]  Yes [ ]  No

Are assessment review standards clearly specified? [x]  Yes [ ]  No

Are evaluation results taken into consideration for program improvements? [x]  Yes [ ]  No

Evaluator’s Comments:

(RWH) The Centre is in the process of completing a 3-year Strategic Plan which is reviewed annually by the Centre Board and as needed the CPM Curriculum Team does its annual program planning and evaluation. Course content is evaluated and adjusted each summer. Based on market demand, post COVID 19, the Centre has implemented a fully in-person program at all levels with hybrid elements where participants complete coaching elements, project work, pre- and post-work asynchronously or in conjunction with a subgroup. Ongoing program requirements to clarify participant deliverables, tracking, and security measures are complemented in the delivery of courses with participant assessment tools, assignments and projects.

(LCS) The Centre has impressively designed two proprietary assessments. The Storytelling one is unique as I have not seen this in the marketplace as a professional coach who is certified in several assessments.

The use of two facilitators allows for in the moment course correction if and when needed.

The Centre’s view on continuous improvement shows based on the discussions had during the on-site virtual visit.

Items of Note:

Click or tap here to enter text.

Suggestions for Improvement (if any):

Click or tap here to enter text.

**4.0 Planning and Implementation. Evidence could include but is not limited to:** Strategic plan; frequency or cycle of planning; flexibility of planning and implementation; documentation of curriculum; survey results; interviews with stakeholders

**4.1 (3.5) Program Requirements. Evidence could include but is not limited to:** brochures, handbooks, flyers, website information, samples of correspondence between program and applicants

**4.2 Tracking System. Evidence could include but is not limited to:** Observations of tracking/filing system/s; samples of correspondence with participants about their progress; interviews with current participants of the program.

**4.3 Security Measures. Evidence could include but is not limited to:**  Observation and review of how participant files and evaluations are secured; policies and procedures

**4.4 Assessment. Evidence could include but is not limited to:** sample assessment reviews and evaluations; policies and procedures; interviews with stakeholders.

**The program adequately meets Standard 4: Planning and Implementation** [x]  **Yes** [ ]  **No**

If no, then please explain your concern here:

Click or tap here to enter text.

**Standard 5: Effectiveness and Improvement**

Does the program assess how well the participants are meeting the expectations
of the Faculty/Instructors? [x]  Yes [ ]  No

Does the program invite participant evaluation of classes? [x]  Yes [ ]  No

Does the program evaluate assessment outcomes to improve the program? [x]  Yes [ ]  No

Does the program demonstrate and implement a plan of appropriate
strategic growth? [x]  Yes [ ]  No

Does the program promote a culture of continuous improvement processes? [x]  Yes [ ]  No

Evaluator’s Comments:

(LCS) Impressive that the Centre is piloting a **6-months post program “stickiness**” evaluation to determine how participants are applying their learnings and capstone impact.

The Centre has a new Facilitator orientation and provides an overview of the cohort group based on a pre-survey that is referenced throughout the program.

Interesting that “well-being” is being introduced to the program.

Items of Note:

(RWH) The Centre identified a backlog of middle management preparation as a key path to growth and consequently expanded the Supervisory and Management Academies to build the CPM pipeline. Sustainable growth is linked to standardizing content for all three programs to scale more easily statewide; expansion of the Advisory Group to facilitate program design and outreach; and additional outreach to Supervisor and Management Academy graduates.

(RWH) The Centre uses a continuous improvement model. The CPM program is evaluated as it is implemented and modified when appropriate. The Centre also plans to convene more events to get direct feedback from faculty and clients including emphasis on feedback at the annual Alumni event highlighted by a nationally recognized speaker.

Suggestions for Improvement (if any):

Click or tap here to enter text.

**5.1 Participants’ Reactions. Evidence could include but is not limited to:** Sample assessments; evaluations and interviews with stakeholders including participants, Faculty/Instructors, and employers

**5.2 Program Development. Evidence could include but is not limited to:** Interviews with stakeholders; documented changes in curriculum and strategic plan

**5.3 Areas of Growth. Evidence could include but is not limited to:** Strategic plan; documented changes resulting from a continuous improvement process; interviews with program stakeholders

**The program adequately meets Standard 5: Effectiveness and Improvement** [x]  **Yes** [ ]  **No**

If no, then please explain your concern here:

Click or tap here to enter text.

**In Conclusion**

After careful review, I find the program adequately meets the NCPMC Standards for accreditation and would recommend accreditation of this program to the NCPMC Executive Council.

[x]  **Yes** [ ]  **Conditionally Yes** [ ]  **No**

If “Conditionally Yes”, what conditions would you propose for consideration by the NCPMC Executive Council?

Click or tap here to enter text.

What did you find particularly effective or remarkable about this program that other programs might wish to emulate?

(RWH) One of the striking dynamics of this CPM Program stems from the nature of the governance model which is a foundation for the culture: the Center is a joint-powers governmental entity so the Board of Directors and the staff are able to offer a range of services that nurture and support the CPM Program as well as provide a strong revenue stream and added value to the fee based financing and strong programming model of the CPM Program. The Board acts as an Advisory Committee for the CPM Program and guides the staff with great commitment and flexibility in meeting the strong public service commitment of the organization – a model for innovation and flexibility.

(RWH) In addition, the management of the program and staff has produced a culture of continuous improvement and innovation. The regional, networked model of the San Luis Obispo Centre program is an excellent example/case study of building with the CPM Program base and delivering Center services regionally. This may be a model for enhancing growth of the program and the culture of the Center organization which is integrated with the CPM Program to permit a flexible, capacity building model for growth in the various regions of California. The matrix cross polinization of competencies of CPM in the Supervisory and Management Academies capped by the Leadership Academy will provide an excellent model to expand and regionalize recruitment across the state. A large, strong alumni base is itself a large market to facilitate. The Challenge for the California CPM Program will be to preserve the unique culture of the organization as it grows.

(LCS) My comments are throughout this document. The fact the Centre is self funded, has sponsors and hires only top notch facilitators and certified ICF coaches. The Centre appears to continuously look for ways to improve, is open to feedback and truly operates in a learning culture.

The following would be interesting to see in other programs emulate:

- Storytelling assessment tool

- Introducing well being curriculum

- Affinity groups during lunch

- 6 month post program “stickiness” assessment – curious to follow this and apply it to other programs nationally

(TW) During our virtual site visit The Centre demonstrated the ability and desire to graciously discuss the current work environment, the goals of the CPM courses, and our suggestions for improving or expanding their offerings.

Any other comments or concerns?

(LCS) I wonder about the Management program and how to leverage this better to increase the Leadership CPM Program.

(LCS) Based on hearing the Graduates of the program, a suggestion for ongoing development and networking of alumni is to bring in The Centre for Organization Effectiveness for ongoing refresher training, potentially provide a good overview of what other agencies are doing – organizational structure, budgeting, other trends.

(LCS) Developing alumni “thought Leader” series and “Communities of Practice” based on topic might be valuable to keep and maintain the network of alumni connectivity. Consideration of refresher training for alumni. Showcase alumni and have them present on their area of expertise or present a challenge to collectively network for possibilities / solutions.

(LCS) Strengths of The Centre appear to be their relationships; openness to suggestions and continuously improve; leverage their data into thought leadership publications and other reference for use; leverage community of networks for improvement across collaborative management of a challenge. Consider hosting a national conference blended with an annual meeting.

(TW) A future focus consideration to support your graduates would be the addition of a Networked Improvement Community to focus on an identified common problem of practice