Facilitator’s Guide

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April, 2019 (v1.0), Collaboration between:
Office of Management and Budget (OMB)
GSA Office of Customer Experience
VA Veterans Experience Office
The Lab at OPM
Introduction

Origin & Purpose of the Map

Each year, nearly 300,000 service members leave active duty and return to civilian life. Many of these service members struggle to find jobs in the labor market that provide financial security. Roughly 1.8 million veterans are working jobs where they earn at or less than the federal minimum wage.

In 2018, Office of Management and Budget (OMB) decided to look closer at efforts across federal agencies that support service members transitioning to the labor market. That prompted a design effort to better understand the lived experiences of service members’ seeking employment and how key federal agencies step in to support them. The result of this work is the Journey Map at hand.

Key Features of the Map

The map is based on in-depth interviews with transitioning service members, staff at six federal agencies (DoD, VA, DOL, OPM, SBA, and ED), and community groups that support service members and other subject matter experts.

The map has five key parts:

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Using the Facilitator’s Guide

Use this facilitator’s guide to lead an interactive workshop to identify opportunities for helping service members during the transition to civilian employment. The activities are planned for participants from one or more federal agencies. The results may expand upon existing programs, reveal opportunities for collaboration, or generate new ideas.

If you have previously facilitated workshops then you’ll likely recognize the techniques, prompts, and the language we use describe the content in this guide. If you’re new to facilitation (welcome), then some of what this guide covers may feel unfamiliar. In this case, we urge you to partner with someone who has done workshop facilitation or to work with a smaller group of participants. This way, you can work through the activities together and informally.

Participants

Participants may include stakeholders that are a part of the transitioning service member’s journey such as agency leaders, people in communications, IT, policy, field workers, and many more.

This workshop is designed for 5-20 people. Split the full group into teams of 4-5 participants each. Group people with diverse perspectives and different skill sets so that each person can contribute and learn from each other in the conversation. Consider these questions:

How many people will be attending? 
What are their roles at work? 
How might you arrange this group to be productive and successful?

Roles

1 or 2 facilitators (lead & co-lead)  
1 notetaker (may be the co-lead)  
Diverse group of participants ranging from agency leaders to field workers

The role of the facilitator is to kick-off the day (alongside an agency leader), set the expectations, and enable an inviting environment. This allows for an inclusive collaboration amongst the participants. The facilitator also keeps track of time and moves activities forward when they feel stuck.

Facilitation Plan

The facilitation plan includes the:
- timeline
- room setup and tools
- essential questions
- agenda
- step-by-step instructions for each activity
- time limits
- visual of the activity in action

Timeline

- Suggested time for prep: 1-3 hours
- Suggested time for delivery: 3-4 hours
- Date and time of the workshop:
Setup

Two Overarching Questions

These questions can be used as focus areas for your workshop. Consider placing them in the front of the room as a starting point for the discussion.

1. How might we draw connections between our current programs and the building and stumbling blocks for transitioning service members?

2. How might we grow and expand our program’s activities, both inside our agencies and across others, to ensure that we are providing support to the needs of transitioning service members?
Setup

**Room Setup & Tools Checklist**

- Wall space and area to hang the map(s) and move around them
- Seating area for a few of the activities (4 stations for 4-5 people)
- Black markers (1-2 for each person)
- Colored markers (4-5 per small group)
- Painter’s tape (low-tack, 1 roll)
- 5x8” index cards (a few stacks)
- Multi-colored sticky notes (1 pad per person)
- 60 half sheets (30, 8.5x11” sheets cut in half)
- Persona Story Tiles (3 Persona Story Tiles per small group—pp. 23-34)
- Story Activity Tiles (3 worksheets per person—pp. 35-36)
- Journey Map (1 poster per small group + a couple of printed 11x17” tabloid-sized maps per small group)
- Action Matrix Timeline (1 poster per small group)
- Camera or smartphone to take pictures

**Printable files**

The ready-to-print files are provided for a plotter and black-and-white printer.

**Station Numbers**

- Make sure to have enough stations for 4-5 people in a group
- Label each station so that when you call out the numbers, the participants know where to go

**Journey Map taped around the room (1 poster per small group):**

- Put markers and sticky notes at the tables
- Source copies or print Journey Map on 36x48” paper
- Print out a few versions of the Journey Map on 11x17” paper for participants who are unable to read it on the wall.

**Ideation sheets at the tables (15 half sheets per group):**

- 60 half sheets (30, 8.5x11” sheets cut in half)
- Split evenly amongst the groups

**Story & Activity Tiles**

- 3 Persona Story Tiles per group at the tables
- Make sure to print Story Activity Tiles on 8.5x11” sheets (3 worksheets per person) and have pens available

**Idea Sorting (1 per small group):**

- Take some painter’s tape and create an x- and y-axis on the wall. If you can’t use the wall, create it on an easel sheet

**Action Matrix Timeline (1 poster per small group):**

- Print 1 poster per small group
- Put sticky notes and markers in each stations

*Page 37-38 includes a visual glossary of the activity worksheets that you will use.*
Setup

Agenda for the Day

Workshop will take between 3 and 4 hours

15-20 mins: Quick intros and expectation setting

30-45 mins: Small group markup

30-45 mins: Story & activity tiles

10 mins: Break

30 mins: Ideation

30-45 mins: Idea sorting

30-45 mins: Action matrix timeline

Introductions and Goals

1 Lead introductions
   • General meet and greet in case people don't know each other or their roles.

2 Explain your role
   • The role of the facilitator is to kick-off the day (alongside an agency leader), set the expectations, and enable an inviting environment.

3 Share context of the project
   • If the group feels that there are additional personas to add to the mix, they can create an additional story of a service member’s transition to civilian employment.

4 Set expectations
   • Explain the goal of the workshop.
   • We want to understand how our program may connect with the building and stumbling blocks that service members face during transition and how we might grow and expand our program’s activities to ensure that we are providing support to the current need of transitioning service members.
   • Explain the mindset for the day: Keep a beginner’s mindset, be open minded, and value all voices.

5 Review agenda for the day

6 Form groups of 4-5 people
Activity

Small Group Markup

**Preparation:** Make sure to set up enough stations for 4-5 people to work together in each group. Tape up the journey map on a wall near each station. Label each station so that when you call out the numbers, the participants know where to go.

🔗 Total time: 30-45 minutes
Start time: ____________
End time: ____________

**What**

An activity focused on inviting participants to digest and mark up the map (accuracy, agency impact, perception of importance, etc.).

**Why**

To orient the participants to the Journey Map and invite feedback

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**Step-by-Step Instructions**

1. **Introduction (10-15 minutes)**
   - Introduce the participants to the map (see the introduction on pages 3 and 4 for talking points)
   - Ask for clarifying questions

2. **Map markup (15-20 minutes)**
   - Individually, each person should provide feedback on the map by writing directly, to add veteran building or stumbling blocks, and to add agency support blocks.
   - Make sure to read the room at the 10-minute mark to see if groups need more time. Make sure you're always aware of how people are feeling in the room. Be willing to adjust as needed.
   - When most groups are done, move into small group discussion. Explain to the group the value of discussing what is written, specifically key things they learned or have questions about. Have each person explain 1 or 2 of the things they wrote up.

3. **Share out (5 minutes for each small group)**
   - Have each group designate a spokesperson to share out a few things that were discussed in the small group.
   - Have a notetaker capture feedback.

4. **Take pictures**
   - Take a picture after the session as record-keeping for yourself and email it to customerexperience@gsa.gov as we are constantly iterating the map.
Activity

Persona Story & Activity Tiles

Preparation: There are 6 different persona Story Tiles in this guide. At each table of 4-5 participants, place 3 different Story Tiles on the table. If time allows, groups can swap the Story Tiles and keep working.

Total time: 30-45 minutes
Start time: ____________
End time: ____________

What

An activity focused on recognizing building and stumbling blocks in the transitioning service member's story and also how one's agency program(s) could or would support this story.

Why

To understand what's working and what can be improved within or across agency programs.

Step-by-Step Instructions

1 Introduction (5 minutes)
   • Introduce the Story Tiles and Story Activity Tiles.

2 Persona Story Tile read-aloud (20-30 minutes)
   • Have a participant read the story from one of the Persona Story Tiles to the group.
   • While the participant is sharing the Persona Story Tile, the other participants should be looking at the Story Activity Tile worksheet and writing down the building blocks and stumbling blocks from the map that resonate with that story.
   • Participants have the option to put in new building blocks and stumbling blocks that are not featured on the map.
   • In the agency support box, identify how your current program(s) could/would support this story.
   • Repeat for the rest of the Story Tiles.

3 Persona Story Tile creation (OPTIONAL)
   • If the group feels that there are additional personas to add to the mix, they can create an additional story of a service member's transition to civilian employment.

4 Share out (3-5 minutes for each small group)
   • Have each group designate a spokesperson to share out a few things that were discussed in the small groups.
   • Have a notetaker capture feedback.

5 Take pictures
   • Take a picture after the session as record-keeping for yourself and email it to customerexperience@gsa.gov as we are constantly iterating the map.
Activity

Ideation

Preparation: Prepare a stack of at least 60 half-sheets (30 8.5x11" sheets cut in half) for each small group and one marker per person. Ensure the How Might We... prompts are visible to each group (either on the map or printed separately). This is a small group activity.

Total time: 45 minutes
Start time: ____________
End time: ____________

What

An activity to generate ideas and opportunities that address key service member needs across six themes found through research.

Why

To expand the solution space for improving the service member experience through both individual agency programs and opportunities for cross-agency collaboration.

Step-by-Step Instructions

1 Introduction (5 minutes)
   - Introduce activity and invite the large group to select 1 of the 6 How Might We... prompts. You could split the room in half and have half of the participants work on one How Might We... and the others work on another one.

2 Half-sheet ideation—home agency (15 minutes)
   - Direct each group to generate ideas for how their home agency or program could address their prompt. Use the half-sheet format (Idea title, headline, and sketch). Throughout the ideation, occasionally provide thought starters to the room (e.g., “How would you do this for under $100? What could you do in 1 week? What would you do if you had no constraints? How would [company] solve this?”)

3 Half-sheet ideation—agency collaboration (15 minutes)
   - Direct each group to create new ideas based on how they could partner with another agency to address their prompt.

4 Large group share out (10 minutes)
   - Ask all groups to post their half-sheets on a single board/wall. Give folks 4 minutes to post and observe what's there, and allow each group 1 minute to pitch the idea they're most excited about to the room.

5 Take pictures
   - Take a picture after the session as record-keeping for yourself and email it to customerexperience@gsa.gov as we are constantly iterating the map.
Activity

Idea Sorting

Preparation: Take some painter’s tape and create a large x- and y-axis (e.g., 5x5’) on the wall to make four equal sectors. Label the x-axis “Effort” and the y-axis “Impact”. If you can’t use the wall, create it on easel sheet paper. This is a large group activity.

Total time: 45 minutes
Start time: __________
End time: __________

What

An activity to support the selection of a few ideas to advance from among all the ideas generated to respond to the themes.

Why

To converge upon a limited number of ideas that can be developed by one agency or cross-agency initiatives to support service members.

Step-by-Step Instructions

1 Introduction (5 minutes)
   • Introduce activity and clarify how to read matrix with “Effort” increasing as you move to the right and “Impact” increasing as you move up.

2 Action priority matrix—individual (15 minutes)
   • Ask participants to individually move each idea from the half-sheet activity from the common board/wall to the action priority matrix based on the effort needed and impact each idea would have.

3 Action priority matrix—group (15-20 minutes)
   • Instruct the group to step back from the grid together to relocate any ideas that are out of place. Guide the group as they do this (e.g., “What are we seeing here? What do you agree or disagree with?”).

4 Voting (5 minutes)
   • Direct each participant to select their top three ideas within the matrix by marking the corner of the half-sheet.

5 Take pictures
   • Take a picture after the session as record-keeping for yourself and email it to customerexperience@gsa.gov as we are constantly iterating the map.
Activity

**Action Matrix Timeline**

**Preparation:** Print 1 poster of the Action Matrix Timeline (per small group of 4-5 people) and set out sticky notes and markers alongside the poster.

Total time: 45 minutes
- Start time: __________
- End time: __________

**What**

An activity that focuses on defining priorities and thinking through the steps needed to get there.

**Why**

To clarify the steps needed to bring ideas to life.

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### Step-by-Step Instructions

1. **Introduction (10-15 minutes)**
   - Instruct participants to return to their small groups. Introduce activity and explain the goal.

2. **Action Matrix Timeline (30 minutes)**
   - From among the top three priorities chosen in the Idea Sorting activity, each small group will define the steps to achieve one of the priorities, develop a timeline associated with the next steps and propose metrics that will explain what success will look like.

3. **Large Group Share Out (10 minutes)**
   - Ask each group to post the action matrix where everyone can see. Have each of the participants walk around and read through the action matrices and individually provide feedback on sticky notes.
   - Once completed, each group can share out with the larger group their top idea they would like to move forward with.

4. **Take pictures**
   - Take a picture after the session as record-keeping for yourself and email it to customerexperience@gsa.gov as we are constantly iterating the map.
Persona Story Tile

Diyana

Age 30
Air Force // Linguist
Enlisted in 2008 and voluntarily separated in 2014

Coming out of high school Diyana decided she had two options. “It was either go to college and go into serious debt, or serve in the military and get some amazing skills.” Diyana enlisted and served six years. In year five she felt confined by the ranks and decided to leave and pursue a career in social impact and social good. She knew she wanted to get there by using the GI Bill to pay for a four year degree at a university. She tried to sign up for TAP but her supervisor made it difficult for her to do so. “They almost discourage it, because they want to retain their people”, she says. Diyana’s focus was entirely on navigating the GI Bill, and finding ways to make it work for her. During TAP, she didn’t pay much attention to other benefits, such as VA health care.

Within a few months after separating from the military, Diyana was enrolled in and excelling at her studies at Columbia University. Her education was almost entirely financed through GI Bill and Yellow Ribbon Programs. She put less focus on managing other aspects of life, like health and wellness, because she assumed VA would just take care of her the way the military had. Then she had a health scare. She got pneumonia, and went to a nearby urgent care center. “I just thought all I need to do was say ‘I am a Veteran, here’s my veteran card’ and they’d take care of me,” she says. She got hit with a huge bill and that set her back financially. “I had no idea how to handle VA health care.”

During her first few years out of service, DIYANA was also learning how to handle networking in a big city. “Veterans are used to a chain of command and everything being formal. I thought ‘yes sir’ and ‘yes ma’am’ was a standard response. It took me doing a few networking events to learn that women don’t want to be called ma’am.” Soon after graduating, Diyana began a high-powered consultant job, advising companies on their social responsibility programs. She also mentors service members who are just newly transitioning to the labor market.
Matthew

Age 30

Matthew joined the military for job security, a chance to travel, to advance in a career, and for camaraderie. He served three tours in Iraq and Afghanistan doing demolition and construction surveys and clearing routes. When he was given a 14-day notice of medical separation, he did not want to go. Matthew has a 100% disability rating. He recognized signs in the last year that they were trying “to boot me out,” but he did not prepare himself for life after military service. He participated in TAP days prior to separation. He had not spoken to anyone about transition prior to TAP, including during counseling checks where there was “no talk other than military [talk].”

Once Matthew left the military, his wife’s job as a bank supervisor on base helped the family. Later, Matthew began to receive disability payments. His goal was to get a decent job with potential that offers a salary similar to what the military paid to support a new baby, two elder children, and his wife. A high evaluation for PTSD eliminated law enforcement as a career choice. Looking for a job was not easy without a degree and he feared being unable to provide for his children. Matthew took a big cut in pay after leaving the military when he landed a job in trucking.

He found value in TAP, but he felt that it was the only resource he had. He learned to write a resume and how to find job fairs, but the program left him without guidance during the transition process, which began immediately in his case. He searched for jobs online using USAJobs, Indeed, and eBenefits. He attended job fairs but found they were not great for him. “I have specialty training, I am not going to work at [a large retailer].” Eventually, he became a sub-contractor on a military base, and he is considering becoming a recruiter for VA’s Vocational Rehabilitation Program.
Keira

Age 32

Enlisting in the army was a selfless act of service for Keira, who wanted to be of service in military and civilian life. “Social work is part of who I am.” Keira chose to separate from the military to spend more time at home and to take over for “other people raising [her] children.” In service, she began to think about the next step through conversations with non-commissioned officers (NCO) and mentors. She also worked to develop skills to be flexible and versatile to better plan for her future. She followed the path of friends and relatives in joining the military, and they “made my transition a little easier because I knew people who’d gone through it.”

After separation, she first cared for the home and children but soon had bought and cleaned everything she could think of and asked, “What do I do now?” She benefited from her spouse's military paycheck who remained on active duty while she took action toward finding a civilian career. She learned online about Louisiana Workforce Commission which gave her access to unemployment benefits. The program’s work search requirement provided structure for her. She took advantage of the Army Career and Alumni Program (ACAP) which teaches skills for a job search.

Two months after separation, she started school and the next month got back up on her feet when she was hired at her first job. The GI Bill helped to cover some of the tuition and she earned a scholarship and received Pell grants. In the Army, she worked more in human resources and doing paperwork than her assigned MOS. That experience helped her get the job. After gaining some stability earning a bachelor’s degree and purchasing a house, her husband was transferred out of state and she had to start all over.
Persona Story Tile

Darlene

Age 26

Raised by a military family, Darlene enlisted at age 17 because she was ready to leave home but “not focused enough” for college. While she was serving in the military, she had faced challenges with both her supervisor and motherhood, and when she decided it would soon be time to get out, she took action. She knew she was passionate about mental health, people and their wellbeing and knew she was meant to be a helper. Her focus was to find a career that met all her needs and wants.

Darlene attended a civilian career building course at a church which made her realize just how much effort it would take to find a job. She did not hesitate and started to build her resume and apply to jobs well before her separation. “I started applying early, because I wanted to practice,” but she applied only to jobs she wanted. She went on three interviews while serving, and received an offer from one that she declined. She learned helpful tips from TAP including websites that would help her find work.

She learned that her lack of credentials limited her potential income. Darlene wasn’t the only person she had to think about, she had her son. She knew she had to go to school to pursue a psychology degree. While she was in service, she started going to school. She knew what job she wanted and she mapped out what it would take to get there.

She also received help from a social worker on base that helped her think about her career in mental health. She had a great support system both personally and professionally to help her navigate herself through the system. Her preparation enabled to her to secure a good job before she left the military. That position did not pay enough, but through connections, she was able to find a better paying job still within the field of mental health.
Angelina

Age 33
Coast Guard, Rank: E4 // Boatswain’s Mate
Enlisted at age 22, medically separated in 2015 at age 29

In her early 20s, Angelina was working a job and going to college at the same time. It was all too much and she was about to drop out of college. She decided to start a new chapter in life and joined the Coast Guard. For the next seven years she manned patrol boats in the waters near Duluth, MN, Yorktown, VA, and Cape Cod, MA, helping with search and rescue operations. She loved the tight-knit team she worked with and she was saving people’s lives: “Those few trips where you get to deliver people to their family...those were bright spots for me.” Angelina also found an inner strength during those challenging missions. “I pushed myself beyond anything I have ever done. That gave me that self assuredness.”

But her Coast Guard years also had a rough side. Some of the rescue missions ended in tragedy. Angelina added that she served under a few brutal commanders. “My gunmate, he tried to commit suicide under [one of my commanders].” Meanwhile, Angelina’s family life back home was falling a part. Her mother—the only person Angelina felt close to in her troubled family—passed away while Angelina was still serving.

Things got worse. Angelina says she had a botched surgery while in service. That, and other health complications, left her in chronic pain. She was medically separated from the military, with a disability rating of 70%. “My health was failing, I did not even know my body anymore. I didn’t have any support. My dad and siblings weren’t there for me. Nobody really cared. It was one of the loneliest times of my life.”

Shortly after leaving the military, Angelina was near-broke and was living out of her car. She got emergency housing support through VA. She took advantage of the GI Bill and enrolled in community college, but experienced another dark cloud of depression and almost dropped out. Then she met a benefits counselor on her college campus. “She was the one who changed my life. She was so supportive and constant. It was the biggest support I have ever experienced.”

Angelina continued with her studies, and implored the benefits counselor to take her on as an apprentice in the office. She got her wish, and now working a paid job under her mentor. Angelina learned to be a benefits counselor herself. She is now about to graduate with a certificate in mental health and maintains her current job as a benefits counselor on campus. She also recently started a student veteran group on campus.
Brad

Age 34
Army // Military Occupational Specialty (MOS): Infantryman
Enlisted 2005, medically separated in 2016

“My job was to go overseas and fight the bad guys” is how Brad sums up his 11 years in the Army. He enlisted at 20 (right after high school) and separated at 31. Brad served 2 tours of duty in or near Iraq. He was struck twice by an IED and an Iraqi girl died in his arms. By the time he was 30, he’d had ten surgeries to patch up all the injuries from combat. He never regained full vision in his right eye.

Because of his injuries, Brad was given orders to leave the military. He had only two months notice. This came as a shock. In eight weeks he had to close up shop, train his replacement, continue to guide his team, decide where to move his family (stay-at-home wife and four daughters), and find a new job. At 31, he was entering the labor market with 11 years as a soldier and transportation coordinator, a high school degree (he never took online certification courses during service) and, in his words, “a broken body.” His VA Vocational and Rehabilitation counselor tried to steer him towards a 4 year degree, using the GI Bill. He didn’t want that. “I am 30-something years old, I am not cut out for school and I need to provide for my family”. Brad sent out 30 resumes and ended up without a job on day one of his post-military life. He is able to support his family with money from disability checks for a bit. He takes a poorly paid job as a prison guard two hours away from where his family has re-located. He hates the job: it doesn’t pay, he misses his family (the prison is now asking him to spend weekends there as well), and his badly injured body is breaking more in this physically-demanding job.
Use this worksheet to fill in building blocks, barriers, and agency supports that you hear or come to mind during the activities. This is an opportunity to capture things from the persona stories and to document observations and details that are and are not on the current version of the journey map.
Journey Map
The Journey Map is the core project document that this workshop is based on. Source or print one poster-sized map for every 4-5 people at the workshop.

Persona Story Tiles
The Persona Story Tiles are stories derived from the research about real people. This guide has six Persona Story Tiles. Each group of 4-5 people will need 2-3 printed story tiles at the workshop.

Story Activity Tile
The Story Activity Tile is a blank worksheet. Each participant will need about 3 Story Activity Tile worksheets at the workshop.

Activity Worksheets
The Activity worksheets describe the details of the small and large group activities.

Action Matrix Timeline
The Action Matrix Timeline is a worksheet for small group activity. Each group of 4-5 people will need one Action Matrix Timeline poster.