EXPERIMENTING WITH REAL TIME SENSING AND REAL TIME ACTION

Introduction

This document describes the ROAR (Rapid integration for Accelerated Results) real time sensing experiment that is currently running and managed by the Work Practice Innovations group. The experiment compares daily experiences of technical males and technical females with both less than and more than one year of Intel experience. Note that the example documented here is the first real time sensing experiment to be successfully implemented. For your own experiment there will, of course, be differences in the participant sample, the questions asked, the intended purpose, and actions. However, the procedure/resources/links will generally be the same. This document serves as a guide for general procedures and resources for planning and executing future real time sensing studies.

Research Goals

Our primary research questions were focused on the similarities and differences in the daily work experience of technical men and women of varying tenure. However, since this is the first real time sensing study, our overarching goal was to learn about the benefits, drawbacks, and feasibility of the real time sensing method itself. While we cannot yet answer all of the following questions since our pilot is still in data collection mode, we seek to understand:

User Behaviors

- 1. Will employees use it? (Device, frequency, etc.)
- 2. Will they answer questions? How many? For how long?
- 3. What if they have to 'badge in' to answer questions?

Insight and Scalability

- 1. Is insight without associated demographic data valuable [enough]?
- 2. Will we [managers, HR, organizations] take action on the data/data analysis?
- 3. Can we predict future issues? How long until we can?
- 4. What makes 'sensing' different/better than previous attempts?

Methodology

- 1. Do we get better insights via pulse or text mining?
- 2. How do we communicate the opportunity to employees in a way that makes them 'buy in'?

Methodology

Overview

A three-month study on the use of an externally hosted real time sensing tool was designed to pulse technical men and women of varying tenure (less than or more than one year of Intel experience). The goal was to understand their daily experiences, to more immediately affect their lows, and to celebrate or acknowledge their wins.

Experiment Team

This is the team that manages/runs the experiment. It includes a Project Lead, a Data Analysis Lead (we are

supplementing with a DOT assignment), and an Action Team (representatives from Great Place to Work, Freelance Nation/Career Coach, Work Practice Innovations).

Participants

Due to budget restrictions and day-to-day management of the experiment, the total participant pool was limited to 90 participants distributed evenly into the following four groups:

- 1. Technical Females (TF) grade 7-9 with < one year of Intel experience (ROAR)
- 2. Technical Females (TF) grade 7-9 with > one year of Intel experience
- 3. Technical Males (TM) grade 7-9 with < one year of Intel experience
- 4. Technical Males (TM) grade 7-9 with > one year of Intel experience.

These groups were selected to be able to compare new to Intel TF's against experienced Intel TF's. In addition, TM's were added as a comparison to understand if there is a gender difference in the results.

Logistics

Duration: The experiment will run for approximately 3 months.

Materials

- Privacy Plan (appendix A)
- Research Study Notice and Consent Template (appendix B)
- Security review plan (generated by pt.post@intel.com)
- Kickoff email (appendix C)
- Weekly report out email (appendix D)
- Survey & Pulsing system

Procedure

- 1. Pre Go Live
 - 1. Privacy Plan go through the Intel process to get approval for data collection.
 - 2. Security review of external site go through the Intel process to get approval for an externally hosted solution. Start a new request at
 - 3. Participant Selection
 - 1. Random selection of non-ROAR participants (what was the methodology used here?)
 - 2. Focused email to non-ROAR participants. Allows them to opt-in to the experiment.
 - 4. Communication Initial communication of experiment, expectations, etc. (see appendix C).
- 2. Go Live
 - 1. Invite participants
 - 2. First week participants complete baseline assessment (3 questions).
 - 3. Every week after the baseline, each participant will be presented with 1 question to answer beginning Wednesday afternoon of each week. These questions compromise:
 - 1. 1 scaled question with ability to answer free form as to why they scored the way they did
 - 2. 1 open text question to give kudos to other members of the team
 - 3. A virtual comment box
 - 4. At the close of each week's survey period, a summary/report will be generated and shared with both the experiment team and individual participants.
 - 5. After the close of each survey period the Action Team will meet to review trends and comments from the week. Action will be taken (Appendix E) based upon patterns and trends which might include:
 - 1. Private messaging with participants

- 2. Small, quick turn solutions to engage participation
- 3. Larger external program changes/updates to be determined based on themes
- 3. Post Go Live
 - 1. Communication Final communication thanking participants
 - 2. Share summary report of 3 month experiment
 - 3. Share learning's with Experiment team

Collected Data

During the experiment the only data collected will be related to the question being asked. No personal data will be captured. As well, the survey will be anonymous in the collection of data.

References

- 1. Global Human Capital Trends 2014, Web, http://www2.deloitte.com/us/en/pages/human-capital/articles/introduction-human-capital-trends.html
- 2. Employee Engagement Infographic, Web, http://www.waggl.it/employee-engagement-infographic
- 3. The Most Logical Yet Underrated Employee Engagement Strategy, Papay and Santille, Fast Company.com, http://www.fastcompany.com/3036314/how-to-be-a-success-at-everything/the-most-logical-yet-underrated-employee-engagement-strate.
- 4. Socialogy Interview: Ayelet Baron, Web, https://medium.com/the-future-of-work-and-business/socialogy-interview-ayelet-baron-22e5b19047b3.
- 5. Why Aren't You Conducting Your Own Neilsen Ratings? The Need for Real-Time Data, web, Kahn, David, http://www.leadersayswhat.com/2015/01/why-arent-you-conducting-your-own-nielsen-ratings-the-need-for-real-time-data/.
- 6. A Simple Technique to Help New Starters Feel at Home, Web, http://www.jobvibe.me/blog/2015/7/6/i-wish-i-could-the-simple-technique-to-help-new-starters-feel-at-home.

Appendix B

Research Study Notice and Consent Template

Template: Please use this form as a template for obtaining the consent of participants in research studies and surveys. This template can be used for projects in the U.S. and abroad. However, some jurisdictions may require additional disclosures and requirements. Please consult the Privacy Office when using this form. Other guidelines are provided at the end of the template.

Participant Consent Form: [Study/Research Name]					
OVERVIEW AND PURPOSE: Intel Corporation ("Intel") is conducting a voluntary study [or survey] to [explain the purpose]. Intel will collect and use the information listed below pursuant to the terms contained in this form. Please review the form and submit any questions to the Lead Researcher listed below. If you consent to participate, please sign as indicated at the end of the form.					
LEAD RESEARCHER: The lead researcher for this project is [name and email address], with (team or department] at Intel Corporation. [If applicable: "Also, Intel has contracted with < vendor name> to help facilitate this research. < Vendor name> is required to comply with the terms set out in this form."]					
PROCEDURE: If you volunteer to participate in this study, you will be asked to [explain the methods and procedures of the study].					
During the study, Intel will collect the following information from you:					
Your participation will include [number of sessions or meetings, and any at-home assignments] and take approximately[explain the expected time required for their participation].					
POTENTIAL RISKS AND COSTS: [See guide]					
PRIVACY: Intel is committed to respecting your privacy. By agreeing to participate in the study, you will be providing the information described above. This information will be accessed and used only for the purposes of the study. Access to the information by Intel employees is subject to the Intel Code of Conduct. Intel may share information with [third parties] solely for the purpose explained in this form. Any information shared with third parties will be subject to the terms set out in this form and subject to a written confidentiality agreement.					
We will keep the study information only as long as needed for our research but, in all cases, no longer than [explain the data retention plan and specify whether certain information (e.g. personal information) will be deleted sooner than anonymous research information]. Intel's analysis and conclusions from the study may be retained indefinitely. The study information will be kept in a secure location and subject to appropriate access controls.					
[Use if audio, video or photos are included in the information collected: "Intel may use research media (photographs, audio or video of you, if applicable) in public forums like academic conferences. If research media are used: (1) the images will only be used to enhance the validity of the research results and (2) Intel will crop or obscure images of non-participants (e.g. household members). Intel will not use these media for marketing and promotional purposes."]					
[Use if information is collected outside of the U.S., but processed by Intel or an affiliate in the U.S. or another country: "Intel may transfer your personal information to Intel Corporation in the U.S. or to any Intel subsidiary worldwide for the purposes set out in this form. Intel participates in the U.S. Department of Commerce's Safe Harbor principles for off-line, online, and manually processed personal data, and any processing of your personal information between Intel affiliates is governed by the Intel Corporate Privacy Rules."]					
CONFIDENTIALITY: This study is confidential. You agree not to disclose any information about the study to anyone other than the Intel researchers and facilitators unless required by court or government mandate.					
QUESTIONS AND CONCERNS: If you have any questions, concerns or complaints about this study or its procedures, please contact Intel's research lead, or you can use the Contact Us form at (http://www.intel.com/sites/sitewide/en_US/privacy/contactus.htm), or send a letter to the mailing address listed below:					

Intel Corporation ATTN: Privacy

M/S RNB4-145 2200 Mission College Blvd. Santa Clara, CA 95054 USA

Please include your <u>contact information</u>, name of the Intel study, the name of the Intel Lead Researcher or team conducting the study, and a detailed description of your request or privacy concern.

CONSENT/VOLUNTARY PARTICIPATION: You consent to participate in this study is subject to the terms explained in this form. Your participation is <u>completely voluntary and you may refuse to participate or leave the study at any time</u>. If you decide not to participate in the study, or withdraw before the end of the study, it will not result in any adverse consequences to you. If at any time you decide not to participate, the consent form you signed will be destroyed, and all information gathered from you will be deleted. If you consent and participate in the study, you grant Intel and its affiliates permission to collect and use the information collected in accordance with these terms. Intel will own the information and materials collected and generated by the study including its analysis and conclusions, subject to any intellectual property rights you may have in the underlying information. You also grant Intel and its agents the right to use, reproduce, perform, display, distribute, and exercise all other rights in any information, comments or materials that you provide to Intel or its facilitator for the purposes explained in this document. You agree that you will not reveal any of your own private product concepts, inventions, or ideas that you may want to develop in the future.

[Include the following only if Intel Employees are Participating in the Study: "Intel Corporation employees and their family members are not required to participate in this study and your participation in this study is viewed as a personal choice and falls outside the scope of your normal or expected work functions, and participation will not be used as work credit. No one should influence or pressure you to be in this study. An employee's or his/her family member's decision to be in the study, to leave the study early or not participate at all, will not affect the employee's job or job benefit".]

COMPLIANCE CERTIFICATION: Intel is committed to compliance with all applicable laws, regulations, policies and ethics rules. This notice is intended to ensure that your participation in this research study, including your acceptance of any incentive, will not violate any such laws, regulations, policies or rules. Intel seeks no promises or favoritism for itself or any of its affiliates in exchange for the opportunity to participate in the research study or in exchange for the incentive. By participating in the research study, (i) you agree that your participation in the research study – including your acceptance of any incentive – will not violate any law, regulation, policy or rule of your country, state, government agency or employer; and (ii) you certify that any incentive is not in exchange for an agreement to influence a recent, pending or anticipated act or decision that may result in Intel obtaining or retaining business or a business advantage.

SIGNATURE: By signing below, I agree that:

- The study has been explained to me, and I have had a chance to ask questions regarding the study.
- I understand and agree to comply with the terms in this form.
- I consent to participate in the study as explained in this form.
- I am at least 18 years of age, and I have full right and authority to sign this form. [Delete when applying to Minors use parental consent below]

Participant:				
By: Name (Printed)				
Participant Signature	Date			
IF APPLICABLE: Consent of Parent consult with the Privacy Office prior I have read this form and, by signing understand the terms and condition those terms.	to collecting any information to collecting any information g below, I represent that: 1	on from or about the pa	articipant.) egal guardian of the Partici	pant, 2) I have read and
Name of Participant:				
Parent or Guardian (Printed Name)	_			
Parent or Guardian (Signature)	 Date			

USE GUIDELINES, RECOMMENDATIONS AND SAMPLE TEXT:

<u>Overview and Purpose</u>: Add a description and purpose of the study that helps the participant understand the bigger picture of what this research is about. The point is to set the stage and explain the purpose of the study – i.e. why are we doing this? The "purpose" is important because it will guide how Intel can use the information collected, so it needs to be clear, concise, and easy to read. Please use non-technical language that a 13 year old could understand. Also, depending on which Intel affiliate is conducting the study, you may need to change the reference from "Intel Corporation" to the appropriate affiliate name.

Example: Intel Corporation ("Intel") is conducting a voluntary study [or survey] to Intel to understand how cars, car trips and activities in cars fit into people's everyday lives, and to evaluate and assess technology related to systems embedded or associated with automobiles. Intel will collect and use the information listed below pursuant to the terms contained in this form. Please review the form and submit any questions to the Lead Researcher listed below. If you consent to participate, please sign as indicated at the end of the form.

<u>Lead Researcher</u>: Identify the Intel employee responsible for the study and which group he/she works for and, if applicable, identify any third parties, by individual and/or company name, who may be assisting with the research.

Example: The lead researcher for this Research is John Doe (john.doe@intel.com) with the Interaction and Experience Research Lab (IXR) at Intel. Also, Intel has contracted with Facilitators, Inc. to help facilitate this research. Facilitators, Inc. is required to comply with the terms set out in this form.

Procedure: Explain how the Research will be conducted. i.e. survey, observation, user experience. You must include a full explanation of what information will be collected from the participant and include whether audio, video or photographs will be taken. Please be specific about what personal or sensitive personal information will be collected (e.g. name, email address, job title, location, biometrics, etc.). Finally, include an explanation how the participant will interact with the research team, and how much time the participant will devote to the project.

Example: This study consists of four components: 1) an in-depth interview in which you will be asked questions about your typical day and how you use technology. This will take approximately 2 hours to complete; 2) a homework exercise to complete with a small video camera we will drop-off with you. This exercise should take about 30 minutes to finish; 3) a second interview in which we will ask follow-up questions, view and discuss the videos you created, and ask your opinion of several product concepts. This exercise should take approximately 1 hour to complete; 4) an excursion with you outside the home (on your commute, in your place of work, etc.) will be scheduled to coincide with either the first or second interview. The length of the excursions may vary, so we will coordinate with you on appropriate length. In total, this study will take about 6 hours over 2 months. During the interviews we will collect your name, email address, home address, job title and work location, and we will capture and document your responses through video, audio, photographs, and text. In the homework exercise you will capture your own responses on digital video.

Recommendation: If you capture audio, video or photographs of the participant, and those media are not essential to the Research, we recommend that you provide an explicit opportunity for the participant to opt-out of their collection and use. If applicable, use the clause below:

"AUDIO/VIDEO/PHOTOS: The photos, and audio and video recordings, may be used by Intel as explained in the Privacy section below. You can opt-out of the collection of such media by Intel, and still participate in the Research. Please initial here if you do not want Intel to take photographs or audio/video recordings of your participation in the study: _____

<u>Potential Risks and Costs:</u> Explain any unusual risks (i.e. anything other than what may be expected in the participant's normal home or work environment). For example, specify whether they will have any contact with metals, plastic, latex or adhesive. And, identify costs to them (if any), or state that there will be no costs to them.

Example: During your participation in the study, you may be exposed to plastic or latex. Please contact the Lead Researcher if you have questions and do not participate if you are allergic to these materials. You can stop participating at any time should you experience adverse symptoms. There are no expected costs to you associated with your participation.

<u>Privacy:</u> Please consult with the Intel Privacy Office and/or Intel Privacy and Security legal when drafting this section. Depending on the nature of the research, it may be appropriate to link to an Intel Privacy Notice. Note that it is not always appropriate to simply link to the Intel Online Privacy Notice (http://www.intel.com/privacy); different policies may apply. Explain whether any information will be shared with a third party and be specific if only some of the information is to be shared. Explain the data retention and deletion schedule for the research materials. Specify whether contact information or other personal information will be deleted sooner than remaining research materials. Finally, for information collected in another country, but transferred to the U.S. or another global affiliate, include the language about Safe Harbor certification and the Intel Corporate Privacy Rules.

Example: Intel is committed to respecting your privacy. By agreeing to participate in the study, you will be providing the information described above. This information will be accessed and used only for the purposes of the study. Access to the

information by Intel employees is subject to the Intel Code of Conduct. Intel may share anonymous study information with Facilitators, Inc. solely for the purpose explained in this form. Any information shared Facilitators, Inc. is subject to the terms set out in this form and subject to a written confidentiality agreement. We will keep the study information only as long as needed for our research but, in all cases, no longer than five (5) years. However, your name, email address, home and work location will be securely deleted within 60 days of conclusion of the study, and all remaining information will be organized by an anonymous participant number. Intel's analysis and conclusions from the study may be retained indefinitely. The study information will be kept in a secure location and subject to appropriate access controls. Intel sometimes uses research media (photographs, audio or video of you, if applicable) in public forums like academic conferences. If research media are used: (1) the images will only be used to enhance the validity of the research results and (2) Intel will crop or obscure images of non-participants (e.g. household members). Intel will not use these media for marketing and promotional purposes. Intel may transfer your personal information to Intel Corporation in the U.S. or to any Intel subsidiary worldwide for the purposes set out in this form. Intel participates in the U.S. Department of Commerce's Safe Harbor principles for off-line, online, and manually processed personal data, and any processing of your personal information between Intel affiliates is governed by the Intel Corporate Privacy Rules.

<u>Confidentiality:</u> The level of desired confidentiality, if any, may vary depending on the nature of the research. For example, for some studies you may actually encourage participants to talk openly about the study, whereas other studies may require confidentiality or even require a separate Non-Disclosure Agreement (NDA). If there is a separate NDA, it should be referenced in this section.

Questions and Concerns: The participants should have the opportunity to submit questions or concerns to the Lead Researcher, or through the Contact Us Form and/or Directly to the Privacy address. For inquiries other than basic questions about the study, the Lead Researcher should consult with the Privacy Office before responding to the participant.

Consent: This section must explain that participation is voluntary and that there will be no adverse consequences to refusing consent or withdrawing from the study. The consent section also includes the express permission Intel requires from the participant to use the materials collected. These rights are important and must remain in this section. Finally, in some cases, not all aspects of the project can be explained to the individual before their participation. For example, some details might be withheld in order to avoid influencing the participants' responses. If material aspects of the study cannot be disclosed prior to their participation, you should consider allowing the participant a reasonable period of time to revoke their consent after they participate in the study. i.e. after they are able to assess what is being asked of them. For an example of language, including a revocation period, see below:

Example: "You consent to participate in this study is subject to the terms explained in this form. Your participation is completely voluntary and you may refuse to participate or leave the study at any time. You may also withdraw from the study, or revoke your consent at any time up to thirty (30) days after your participation in the study by contacting Intel's Lead Researcher. If you decide not to participate in the study, withdraw, or revoke your consent, it will not result in any adverse consequences to you, the consent form you signed will be destroyed, and all information gathered from you will be deleted. If you consent and participate in the study, and do not revoke your consent as explained above, you grant Intel and its affiliates permission to collect and use the information collected in accordance with these terms. Intel will own the information and materials collected and generated by the study including its analysis and conclusions, subject to any intellectual property rights you may have in the underlying information. You also grant Intel and its agents the right to use, reproduce, perform, display, distribute, and exercise all other rights in any information, comments or materials that you provide to Intel or its facilitator for the purposes explained in this document. You agree that you will not reveal any of your own private product concepts, inventions, or ideas that you may want to develop in the future.

Compliance Certification: This section confirms Intel's commitment to all applicable laws and ethics rules. Since many of our studies involve Intel providing some sort of incentive to recruit participants, we want to be certain that the participants are put on notice that Intel is not expecting any favoritism or promises in return for the participant accepting any incentive from Intel. We want participants to agree that their participation in our study and receipt of an incentive to do so is not against any law, policy or regulation in their country. In addition, we want participants to understand and acknowledge that whatever incentive they are receiving from Intel is not in exchange for the participants to agree to influence any recent or pending act that may mean that Intel retains business or a business advantage.

<u>Signature</u>: This language must remain as set out in the template. However, if participant is between 13 and 17 years of age, you must delete the last bullet item and you must obtain parent/guardian consent using the Parent/Guardian consent form provided with the template. In such case, *both the participant and the parent/guardian must sign*. If you plan to use participants younger than 13 years of age, please contact the Privacy Office and Privacy and Security Legal prior to collecting any information from the participant.

Appendix C

Initial ROAR Participant Email

INTEL TALENT ORGANIZATION



Work Practice Innovations Pilot

How's it Going? Sensing Survey Invitation

May 25, 2015 Dear ROAR Participant,

Every organization experiences its share of cultural wins and organizational uh-ohs. At Intel, we're no different. And now we have the opportunity to grow and improve our work environment together.

To do this, we need your honest feedback on how we're doing and where we can do better. At the end of the day, each and every one of us creates and owns the current and future direction of our culture. As you know, we want to understand your experiences. A better understanding of your experiences will shape our assessment of what's going well & what needs to be better & help us to take action in these areas. We'll be using a company called TINYpulseTM, through which you'll receive one simple question per week.

TINYpulse[™] will email you one question per week for 12 weeks.

- * Your responses are anonymous and even we can't peek
- * Since we can't improve what we don't measure, this allows us to grow as an organization

The weekly survey [really, the 1 question] shouldn't take you more than 5 minutes. We're thrilled to invite you to participate & look forward to your insights.

Follow this to get started!

Who can participate?

Your participation is completely voluntary and your responses are anonymous. No personal information will be reported as part of your answers. To learn more about how Intel manages your privacy, please visit Intel's

Thank you in advance for participating! Your candid feedback is important for manager and employee development.

Questions

Contact the

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INTEL TALENT ORGANIZATION





How's it Going? Sensing Survey Invitation! Survey Invitation for ROAR Participants

May 26, 2015 Dear ROAR Participant,

Every organization experiences its share of cultural wins and organizational uh-ohs. At Intel, we're no different. And now we have the opportunity to grow and improve our work environment together.

To do this, we need your honest feedback on how we're doing and where we can do better. At the end of the day, each and every one of us creates and owns the current and future direction of our culture. As you know, we want to understand your experiences. We'll be using a company called TINYpulseTM, through which you'll receive one simple question per week for 12 weeks. Your responses are anonymous and even I can't peek!

We're thrilled to invite you to participate & look forward to your insights. They really are incredibly valuable to us.

Jennifer Monnig Manager, Work Practice Innovations

Who can participate?

Your participation is completely voluntary and your responses are anonymous. No personal information will be reported as part of your answers. To learn more about how Intel manages your privacy, please visit Intel's

Questions Contact the

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Appendix D

Weekly Report Out Email

INTEL TALENT ORGANIZATION





July 2, 2015

Happy Thursday! Here are the results from the second week. We really appreciate your participation in our sensing pilot. Just a reminder, your responses are anonymous and even I can't peek.

Click here to view the report

Thanks and feel free to let us know if you have any questions!



Who can participate?

Your participation is completely voluntary and your responses are anonymous. No personal information will be reported as part of your answers. To learn more about how Intel manages your privacy, please visit Intel's

Questions
Contact the

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Appendix E

Real Time Action Strategy

The Action Plan below sets out how the Work Practice Innovations team will glean insights and create real time actionable ideas into the ROAR sensing pilot in order to address a number of the points raised by the survey, administered to select groups during the 3 month pilot. Whilst every effort will be made to implement change / make improvements where necessary, it is not possible to address every issue raised by the survey at this stage. There are certain financial constraints imposed upon WPI over which it has little or no control, and such constraints dictate the amount / type of work that can be done. However, as the following Action Plan indicates, all measures that can be taken will be done so.

Strategy	How	Responsibility	Timeframe	Notes
Continuous dialog with survey participants	1. Based on the respondent comments and virtual suggestions, private message the participant to: a. Find our more about the situation b. Get more detailed information on suggestion c. Log suggestion	Redacted	Daily	
Simple actionable ideas from survey themes	1. Analyze survey results: a. Tag results with keywords b. Drive out themes c. Create list of possible actions based on themes d. Execute 3-4 simple and 1-2 complex actions per month	Redacted	Weekly	What is the definition of "actions"?
Share weekly output	 Scrub weekly survey Share with participants 	David Shaw (Primary)	Weekly	
Leader Sharing	1. Share output at a BUM/QGS	Team/Org/Bus Management	Quarterly/As needed	Can leaders pick a couple things and share in team meetings or bus meetings? QGS, read these?