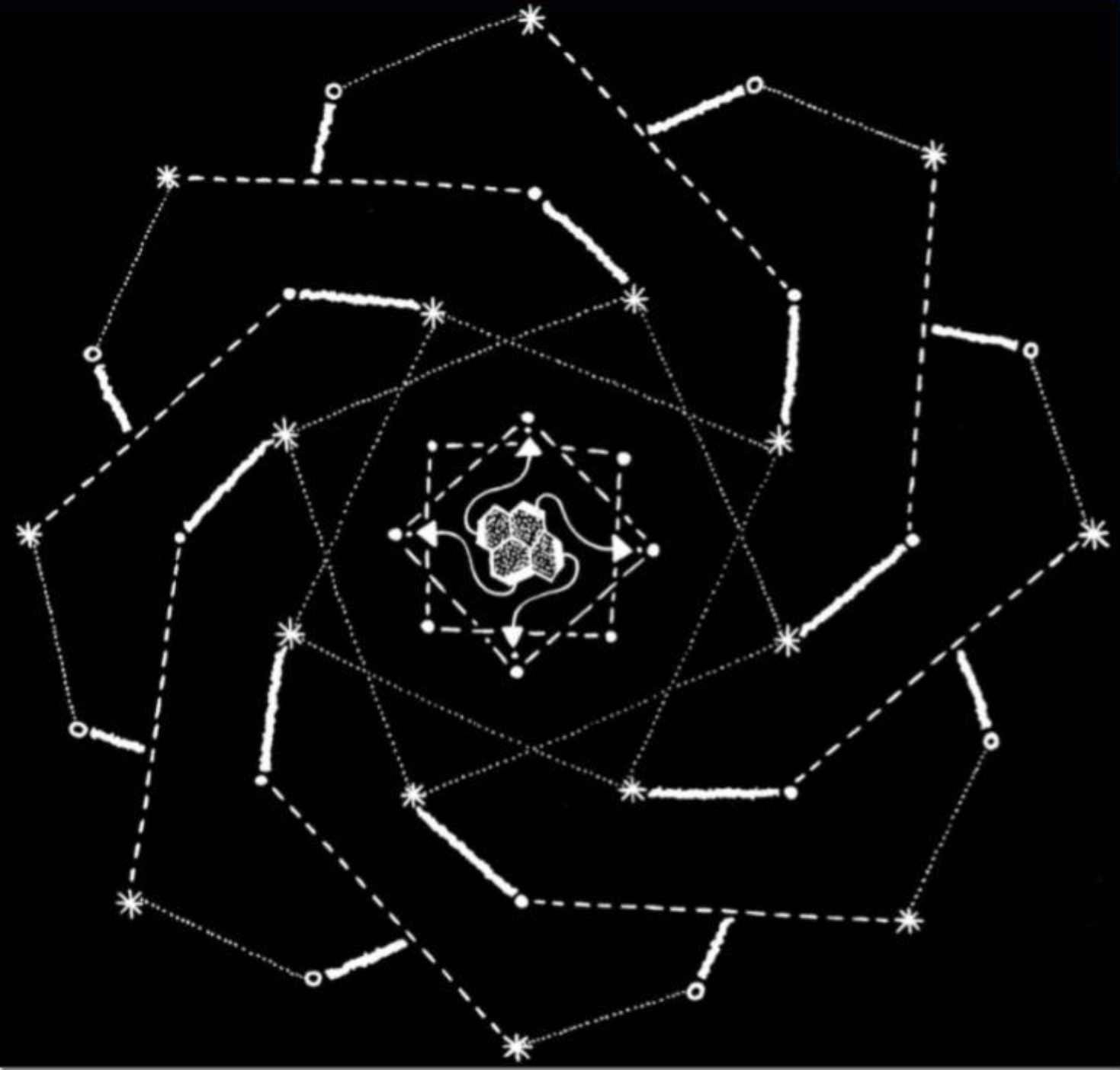# The Facilitator's Catechism Playbook

The Facilitator's Catechism Playbook

RC OG

Remotor Consulting Group
www.remotorconsulting.com

in association with and with support from

COGSEC
www.cogsec.org

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Based on the fourth chapter of the book:
"The Great Preset: Remote Teams and Operational Art", COGSEC Publishing 2020

Contents

Executive Summary

The Facilitator's Catechism (FC) is an operations order formatted as a project-management document. The FC is intended to be used & refined by remote teams in order to greatly increase organizational alignment, project comparability, reliability, and productivity in the pursuit of timely deliverables while reducing work-about-work. It is built from the battle-tested, project management techniques used by the National Militaries and by the Defense Advanced Research Projects Agency. This playbook is meant to be a document that assists with that adoption, ensuring clarity and providing a Single Source of Truth (SSoT) for the intents of its application and its usage. It offers context on the background of catechisms (Part I), a step-by-step guide on how to deploy it for the first time (Part II), and examples, templates, further reading, and resources for making it a part of your regular individual or team work-flow (Supplemental Resources).

"Teamwork is the ability to work together
toward a common vision.
The ability to direct individual accomplishments
toward organizational objectives.
It is the fuel that allows common people
to attain uncommon results."

- Andrew Carnegie

Part I:
An Introduction to Catechisms

One of the most frustrating and fundamental difficulties of remote collaborative work is synchronization and making sure that the right people have the right information at the right time. There are a wide variety of tools available to manage projects and issue work-tickets, but: what happens when the work ticket requires more than one person to solve and it is not known who on the team has the expertise to help solve it? What if project management software is overkill or the approach may change depending on who is involved?

Maybe you're a manager at a chatbot company and receive a complaint from a client and no single person has the expertise to respond to the issue… and the team responsible for building the chatbot has long since disbanded. Maybe you're a member of an emergent team at a virtual hackathon or a conference and you want to make sure the team stays synchronized after the event and can rapidly onboard new members, even though the team's approaches may entirely change by the time a deliverable is accomplished. Maybe when reading about these situations experienced by these modern remote teams, it brought to mind elements of your daily work—involving the need to coordinate complex work across time zones, cultures, contexts, and perspectives. In all these cases, project management tools alone are not able to address the needs of the manager or the team. Luckily, there are a set of tools designed to catalyze and synchronize teams in situations where there is environmental uncertainty, interactions of remote elements, and the potential for **mission creep** or **mission drift.**

Tool-sets for dealing with these situations have been developed and battle-tested over the last two or three thousand years by organizations known in the Organizational Psychology literature as "High Reliability Organizations" (HRO). Common examples of HROs include special forces, aircraft carrier crews, and operating rooms. HROs are characterized by having a low or zero failure rate despite being engaged in ongoing interactions with complex threats. One of these tools is the "Operations Order", or OPORD for short.

Mission Creep

Mission Creep refers to "shifting goal posts" for a given project or team in terms of deliverables or approach. Failure to contain or constrain a project can lead to a mission that "creeps" into covering an unnecessarily broad swath of research or work. Even in cases where a team deliverable is achieved, the approach of a project or team can change so much during the work that the deliverable is irrelevant for the initial problem or is not what the larger organization actually requires.

By analogy to processes of drift and selection in biological systems, we call this situation of dislocated work Mission Drift. When projects are subject to mission creep/drift, or simply have no goals at the outset, it leads to attrition and fatigue in organizations of all sizes. A gradual shifting of objectives or a lack of goal defined is thus damaging to performance and outcomes of both individuals and groups. These maladaptive situations can be avoided with the use of documented and unambiguous goal-setting, through a variety of techniques.

"*Operations Orders (OPORDs) are traditionally described as a formatted, written deliverable that describes explicit instructions for a military unit to enact. OPORDs are different from simple requests in that OPORDs are accompanied by expectations regarding execution and tend to have a specified format, use a codified ontology, and convey the scope of the mission or situation*"

- The Great Preset, 2020

OPORDs have been the basis for managing military operations since the birth of the first professional militaries—every professional military has used them and if you removed them, these militaries would cease to operate effectively. That being said, if you're a veteran of the armed forces, this may be a painfully boring term, (but stay with us because the OPORDs we're going to introduce may be fairly different than the ones you're used to). If you're not a veteran however, you may be asking: "if OPODs are so fundamental to the military, why haven't I heard of them?", the answer to this question is actually quite simple: Military logistics and non-combat process topics are just rarely a matter to capture the attention of historical observers or of the audiences they expect will be reading their work and are such a normal part of operating in a military environment that veterans would rarely have a reason to speak about them.

Over the years, OPORDs have taken on many different formats and been used in various different contexts. Some OPORDs were extraordinarily long—micromanaging every aspect of intended action, some have been formatted like prose or lists, and others have been short and well categorized. OPORDs, being used in high-reliability contexts, are

subjected to a similar kind of pressure that organisms are—the good formats survive and the ones that are poorly adapted face extinction. Shorter, well-structured OPORDs that give units room for flexibility in operations, such as the American "Five Paragraph Order", have become the norm in militaries, whereas longer, micromanagement-focused OPORDs have died off in military contexts.

The Israeli OPORD Format

1. Friendly forces.(a) Intent or aim of the higher.(b) Unit's mission.(c) Adjacent forces missions.(d) Additional forces missions.1) Engineers.2) Artillery. 3) Direct support.4) General support.

2. Terrain.(a) General description.(b) Axis.(c) Main obstacles.(d) Trafficability/deployment areas.(e) Key terrain and vital terrain.(f) Summary of effects of terrain on friendly plan.

3. Enemy.(a) Intentions.(b) Deployment and strength.(c) Most probable course of action.

4. Commander's intention (when, what, and why).

5. Method.(a) Scheme of maneuver and fire support.(b) Time phasing and objectives.

6. Forces and tasks.

7. Combat support (general).

8. Administrative and logistics (general).

9. Control.(a) Location of CP's by stages.(b) Radio procedures.

U.S. Five Paragraph Order Format

1. Situation

2. Mission

3. Execution

4. Administration and Logistics

5. Command and Signal

However, long-lived OPORDs are not universally adapted to all contexts, in the same way that long-lived organisms are not universally adapted to all environments. This being the case, use-case specific versions of OPORDs or entirely new formats sometimes emerge to serve the needs of High Reliability Organizations in new contexts. One of these OPORDs is known as the Heilmeier Catechism, created by George H. Heilmeier while he served as the Director of the Defense Advanced Research Projects Agency (DARPA). It was used as a "safety checklist" that needed to accompany any project DARPA was going to host and fund. The impact of its use is well known in the military research and within the areas of the scientific community which do work with DARPA and similar agencies.

What is a Catechism?

A catechism is a set of questions which, if answered, help solidify individual and group understanding of a concept, topic, or project. Traditionally, catechisms were used to build alignment on theological concepts, and answers were pre-set and meant to be memorized. However, in modern usages for project management, Catechisms instead include questions that would need to have answers before work could begin. The clean mapping of questions to answers across projects also allows for comparability of those projects and for post-mortem analysis.

Research on the history of OPORDs and the analysis of the factors which make them effective, drive change, and catalyze emergence of new OPORDs is explored in the book that this document is built on: The Great Preset. In this book, a new OPORD format is offered for teams, built on the battle-tested structure of the American "Five Paragraph Order" (5PO) and the ease of use and adoption of the Heilmeier, with consideration for new digital affordances, remote work, and emergent teams. It is called the Facilitator's Catechism (FC).

Facilitator?

As organizations have more inter-department and inter-organization interactions and collaborations, bridge roles become more and more necessary. A "Facilitator" is an individual occupying a bridge role where more traditional hierarchal position such as "manager" won't necessarily fit well. An emergent group formed at a conference for example, might not benefit from the election or appointment of a manager to run the group, but still needs leadership, direction, and a single source of accountability. A Facilitator's job is to ensure norms are established and that work is performed.

The FC incorporates several modern technological affordances (multiple advanced renders, versioning) and was designed with an eye towards the key use cases and challenges experienced by modern online teams. The FC is intended to be used & refined by teams across sectors and stages. Built into the FC is the ability for teams to customize their experience through modification of the rendering capacity. It is also built to be a foundation format, from which other use-case specific catechisms are meant to be built. We will now discuss how to use it.

The FC is a series of questions that ensures that you have thought through the implications and potential implementations of a project and recorded it in a way that allows others to quickly get the information they need in order to contribute if they decide to do so. The clean map of questions to answers also makes projects highly comparable and renderable to various presentation formats (slide decks, canvases), so that sponsors or parent organizations/managers can quickly get an idea of your project's purpose and approach. It is especially easy to adopt, because it is meant to accompany much larger project documentation so no overhauls to work process are required for its use—however, it can be prepared in advance to either guide the development of that project documentation or to offer to parent organizations and managers prior to work on more detailed plans to reduce the chances of wasted work. A catechism can take as little as 10 minutes to prepare, whereas a software requirements specification can take months.

This playbook is intended to provide context on what the Catechisms in general (Part I), how to deploy it for the first time (Part II), and provide a set of templates and resources so that you can deploy and iterate on Facilitator's Catechisms in your own work and learn more about their history and impact (Supplemental Resources).

Key Insights

- High-reliability organizations (HRO) use Operations Orders (OPORDs) to help teams succeed amidst uncertainty—especially in remote settings

- The Facilitator's Catechism (FC) is a novel OPORD developed to take advantage of modern online collaboration tools and practices

- The FC can be easily adopted as it can be used in conjunction with other project management and planning tools and documentation or as a precursor to it

- This allows the FC and other catechisms to be adapted to your practices so you can be a more effective team

Part II:
Using the FC

The Facilitator's Catechism is an operation order format designed to address the situations that modern teams find themselves forming and performing in. Use of the Facilitator's Catechism is mostly self-explanatory because at each stage, all that is required is to address specific questions as concisely or elaborately as relevant. However, because first-time users of Catechism-based operation orders are often used to much more complicated and lengthy project-documentation—it's easy to think for them to think there's something left out, for example external dependencies or processes necessary to make sure it's done correctly. In other cases, a group can think a Catechism is being used for the wrong purpose, or that because the first pass was reasonably effortless: "I must have done something wrong." Plain and simple: The FC is just a series of categorized questions you should answer with mindfulness, coherence, concision, and limited jargon. It will help stabilize and optimize teams across domains, and also provide a reference point for onboarding and efficiency.

A Catechism is in a question-and-answer format, like a form or madlib. For the purposes of the FC, each section can be answered with paragraph format or directly in a list fashion, again, what matters is: "if someone looks at this document, will the answers to these questions be easily found and understood?". Depending on the project, team, and stage you are making an FC for, single sentence answers to these questions may suffice, or you may want to provide a detailed multipage answer or even accompanying documentation. You also don't have to be ready to answer all the questions when you start, it's supposed to be a part of the process of planning—not just a communicator of plans.

What if my organization already has a process?

That's Okay! Many approaches to Facilitation and project development exist. The Facilitator's Catechism is intended to be a technique that **"plays nice"** with other approaches—it does not itself specify how the work will be carried out, nor does it limit the team from using other processes or documentation. A catechism can be used prior to working on those other documents to get much-needed clarity before diving in to building out more detailed project documentation or afterward, to help communicate that detail quickly.

Anatomy of the FC

The FC has a Header, Footer, and 6 body sections. The Header gives at-a-glance administrative details like the name of the project lead and their contact information, as well as the start date, intended date of completion, and whether or not new collaborators are being requested. Each section is an important category for understanding your project. The sections, when accompanied by answers to their respective questions, tell a story, because they all help to answer the meta-questions listed below:

Situation

What is the problem that this team or project is addressing?

Mission

What is the project going to do about it?

Potential Avenues of Approach

How would it do this? What and who is needed to do it?

Milestones

What would the timeline look like? How would you measure progress?

Implications of Outcome

If the project were able or not able to achieve the mission, what would that mean for the problem? For future work? For adjacent projects?

Administration, Logistics, and Communications

What details would someone need in order to know if they can contribute and how to do so?

In the following pages we'll go step-by-step from starting the FC to iterating on it. Each section will be accompanied by an example from the FC used to write this playbook and a graphic to the right-hand side.

Project Header

Full Title of Project

Project Callsign	xxx
Team Name	xxx
Facilitator	xxx
Contact Information	xxx
Date of Announcement	mm-dd-yyyy
Call for Collaboration Ends	mm-dd-yyyy / When Completed
Intended Date of Completion	mm-dd-yyyy / Not Yet Known

Body Sections

Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

Mission

Given the situation, what are the team's explicit objectives?

Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? What else might be affected? What work will come next?

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

Project Footer

Starting the Catechism

Starting the catechism begins with downloading one of the templates provided or linked in this document or opening an empty document in a word processor of choice. No fancy formatting is required—you could even use a piece of paper (but this isn't so great for sharing). It is highly recommended you use a versionable word processor, but it's not necessarily required. Before answering any of the catechism's questions, it's important to first select a working title (if you name something, you make it real) and then add the following seven items:

1. Unique Project Callsign
2. Team Name
3. Facilitator
4. Facilitator Contact Information
5. Date of Announcement
6. Call for Collaboration End Date
7. Intended Date of Completion

Some of these items might be adapted for your organization, especially if involvement in the project is closed (and therefore, call for collaboration is not useful), or there are specific organizational titles involved (if your team has special Point of Contact or Supervisory positions). A unique project callsign (like the one used for this one: FCP) may seem like its an aesthetic element, but there is a good reason that High Reliability Organizations make use of callsigns for projects: it enables good practice in file and resource naming (FCP-Manuscript-Draft), communications (email header: FCP - Feedback Needed), and task tracking. It increases the ability to query resources regardless of the knowledge or resource management system used and allows for easy reference. A team name is not always necessary as it is often synonymous with the project title, but it's not only useful for the same reasons as a callsign (RMTR-FCP) but also for esprit de corps and team morale, as well as for the effortless documentation of a team's history.

Date and contact information are necessities, as they give important context and accessibility to the reader and computational analysis systems.

Facilitator's Catechism Playbook

Project Call-Sign	RMTR-FCP
Team Name	Remotor
Facilitator	R.J. Cordes
Contact Information	▮▮▮▮▮▮
Date of Announcement	02-04-2021
Intended Date of Completion	03-04-2021

Full Title of Project

Project Callsign	xxx
Team Name	xxx
Facilitator	xxx
Contact Information	xxx
Date of Announcement	mm-dd-yyyy
Call for Collaboration Ends	mm-dd-yyyy / When Completed
Intended Date of Completion	mm-dd-yyyy / Not Yet Known

Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

Mission

Given the situation, what are the team's explicit objectives?

Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? What else might be affected? What work will come next?

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

[Facilitator's Catechism v1.3](#)
TeamName-Callsign v1.0

Describing the Situation

There are, historically, very few operations orders or catechisms that don't prioritize or include a requirement to provide a brief explanation of situational details. However, most prioritize situational details necessary for carrying out the mission rather than the reason or need for the mission. In teams that are remote, emergent, responding to emergencies, or proposing a project, **it is a requirement that the team be able to communicate the situation it is responding to rapidly with clarity** so that potential team members and stakeholders—as well as the team itself, can align on key situational details and reasoning for action.

The situation section asks questions which, if answered, tell the reader a story of why it is that some action is warranted. You might have some action or objective in mind, but this is not the place to discuss it—and it can be of use to write this section before deciding on what action to take or what objectives to set. Too often, we decide on action before we are able to explain the situation prompting it with coherence—yet no project or mission should begin or be designed before this is done. This section asks questions that need to be able to be answered in order to communicate the need for action effectively—and need to be answered before deciding on what action should be taken.

> ## Situation RMTR-FCP
>
> *What is the nature of the situation or problem the team is being formed to address? Are there known causes?*
>
> The Facilitator's Catechism has received positive feedback and seen successful implementation in domains such as hackathons, software development, and research work and derivative catechisms are being included in entrepreneurship curriculum at the university-level—despite these successes, it has had a low rate of adoption. Based on feedback, this is likely due to the lack of shareable, non-academic materials on its use.
>
> *Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate?*
>
> This situation is novel to Remotor, but there are numerous strategies available to increase adoption rate of tools.
>
> *What will happen if this situation is not addressed?*
>
> The adoption of The Facilitator's Catechism will have to rely on word-of-mouth and impact on project success—based on current adoption rate, it could take longer than a year to see this and derivative catechisms become commonly used.

Full Title of Project

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Situation

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Mission

Given the situation, what are the team's explicit objectives?

Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? What else might be affected? What work will come next?

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

Defining a Mission

Mission has a surprising number of definitions, and in the contexts and domains it's most often used, it often has many definitions, some formal, some informal. Mission is usually used to refer to the sending of a group to perform some task, a task that has been assigned, or, in the case of "mission statements", lofty pursuits that are ambiguous or broadly scoped. Mission in this case, draws on its usage in operations orders, where it is defined as an "intimation of the end" —the objectives of an endeavor should always refer explicitly to some end-state not the actions taken to achieve it.

In the same way that the situation needs to be able to be communicated coherently before deciding on objectives, the mission needs to be defined coherently before deciding on action and approach. Making approach and objectives synonymous limits a team's ability to adapt and improvise. Militaries went through radical changes when Generals realized that fusing the two was preventing the officers under their command from being creative, flexible, and responsive to change—from practicing something that has since been termed "Operational Art".

Outside of military contexts, in the domain of industrial and organizational psychology, quality and coherence in goal-setting is found to be one of the most impactful elements of successful projects. Even in personal endeavors, goal-setting is essential to success.

Missions need to be well-scoped, separated from approach, coherent, and most importantly: **achievable**, if the mission were to be achieved, it should be obvious. Further, the mission **needs to be documented**. Sometimes missions need to change due to changing circumstances! In the case they do change, the change to the mission **needs to be documented**. Far too often, teams succumb to mission creep and shifting goalposts. This causes misalignment between the members of the team and between the team and its stakeholders—hurting morale, creating potential for redundant or counterproductive work, and reducing the likelihood of to producing or acknowledging meaningful outcomes.

The Missions section asks only one question, but it is likely the most important question in the entire catechism.

Mission RMTR-FCP

Given the situation, what are the team's explicit objectives?

Enable individuals and organizations to rapidly adopt the Facilitator's Catechism.

Full Title of Project

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Contact Information	xxx
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Facilitator's Catechism v1.3
TeamName-Callsign v1.0

Offering Potential Approaches

Where the mission provides the intimation of the end, the Potential Avenues of Approach section provides the expected approach to realizing that end. While a section related to approach or execution is not unique to project documentation and proposals or operations orders, this section is unique in that it doesn't ask for the team to commit to a single approach. It intends to allow flexibility and operational art by the team, while still keeping potential stakeholders in the loop. Further, the facilitator and current team-members can add approaches that would only be possible if other experts were added to the team—providing potential approaches allows potential members to see that their perspectives and capabilities might be needed.

The Facilitator's Catechism (FC) is meant to be a living, versioned document—if new approaches are discovered or old ones considered obsolete or not fit for the mission, they can be removed, and a new version can be released. On the other hand, if the team has begun work and an approach has been officially selected and is currently in progress, this section can now be renamed to "Approach" in order to ensure that readers and stakeholders are aware that the team has now committed to a particular methodology. It's also okay to release the document to potential members and stakeholders with this section marked as "not yet known", but work should not begin until the team can answer this section's questions directly.

> # Approach RMTR-FCP
>
> *Given the situation and mission, what are the potential or current avenues of approach?*
> *For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?*
>
> We will write a simple, short, clear playbook for adopting and using the Facilitator's Catechism that can be distributed to organizations and participants of workshops. The playbook is a standalone "Who", "What", "Why", "Where", "When", and step-by-step "How" for using the Facilitator's Catechism (the deep-dives limited by the playbook approach are present in the original citation—which contains more historical and conceptual context). One key risk is the project running past expectations, causing pile-up with other planned projects. We will use standard Remotor Consulting Group tools, etiquette, and meeting protocol to stay on schedule and keep a rhythm to writing.

[PROJECT CALLSIGN]

Full Title of Project

Project Callsign	xxx
Team Name	xxx
Facilitator	xxx
Contact Information	xxx
Date of Announcement	mm-dd-yyyy
Call for Collaboration Ends	mm-dd-yyyy / When Completed
Intended Date of Completion	mm-dd-yyyy / Not Yet Known

Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

Mission

Given the situation, what are the team's explicit objectives?

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Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

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Facilitator's Catechism v1.3
TeamName-Callsign v1.0

Deciding on Milestones

The milestones section isn't always present in project proposals or operations orders—its presence here is inspired by the success of the "Milestones for Success" section in the Heilmeier Catechism. The objective of this section isn't to lay out every single micro-task or detail of the workflow of the project, especially not if the approach hasn't been selected yet. Instead, the objective here is to refer back to the situation and the mission, and then consider the overlaps in potential approaches in order to consider what milestones would indicate progress toward the completion of the mission.

Milestones can be described as the sub-missions, if each were completed—the mission would be completed. As such, with a call back to what was said about defining missions: Milestones need to be well-scoped, not too closely tied to approach, coherent, and most importantly: achievable and easily observed, if the milestone were to be achieved, it should be obvious. Further, **milestones need to be documented**. Sometimes milestones need to change due to changing circumstances! In the case they do change, **the change to the milestones needs to be documented**.

Milestones asks only one question, but depending on how you decide to present the answer to that question, it could be one of the longer sections.

Milestones RMTR-FCP

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Task	Expected	Completed
Writing	3/4/21	2/26/21
Part 1 Outline	2/5/21	2/5/21
Part 1 Sections	2/15/21	2/10/21
Part 2 Outline	2/19/21	2/18/21
Part 2 Sections	3/1/21	2/26/21
Editing/Formatting	3/4/21	
Figure Generation	3/1/21	3/1/21
Final Confirmation of Edits	3/2/21	2/27/21
Final Confirmation of Formatting	3/4/21	3/2/21
Push to Preprint/Assign DOI	3/4/21	3/3/21
Debrief Call	3/5/21	3/3/21

✅ [PROJECT CALLSIGN]

✅ Full Title of Project

Project Callsign	xxx
Team Name	xxx
Facilitator	xxx
Contact Information	xxx
Date of Announcement	mm-dd-yyyy
Call for Collaboration Ends	mm-dd-yyyy / When Completed
Intended Date of Completion	mm-dd-yyyy / Not Yet Known

✅ Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

✅ Mission

Given the situation, what are the team's explicit objectives?

✅ Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

➡️ Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? What else might be affected? What work will come next?

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

✅ Facilitator's Catechism v1.3
TeamName-Callsign v1.0

Considering Implications

The implications of a team's work are vital to keep in mind, from the earliest phases of the team's formation on through to the accomplishment of milestones. While the Situation section of the Facilitator's Catechism (FC) asks: "What will happen if this situation is not resolved or addressed?", the Implications of Outcome section asks you to tell the story of what will happen if the approach taken does resolve the situation—what would it mean if the team succeeds. Implications are important because they are the driving impulse for the team to exist at all: the project is being performed not simply because some Situation exists, but because using the suggested Potential Approaches to achieve the Mission will result in some better outcome than would occur if nothing was done at all. Aligning on Implications does more than just motivate the team—it provides context to all the other sections of the FC, and connects the Milestones in the previous section to a path that leads—not just to the end of the project, but to some better future, in the context of the "bigger picture".

The Implications section is also of great help in presentation and proposals to external parties. If someone asks the team "What you're working on, why does it matter?", the team can readily point to the previously considered Implications of their work, rather than justifying obvious Situations, providing non-sequitur information about Milestones, detailing technical information about the approach, or worse yet, reveal that they haven't really considered this key question at all. To the stakeholder, this is likely the most important question, but far too often, teams get wrapped up in the work and forget to consider the work's place in larger contexts or what happens after it's done.

Implications of Outcome RMTR-FCP

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members?

A clear, accessible, and informative Facilitator's Catechism Playbook would improve the rate of adoption and refinement of the writers' usage of catechisms in general.

What else might be affected?

Given the ease of sharing and onboarding, others might be encouraged to write their own catechisms and accompanying playbooks.

What work will come next?

If the playbook was successful in increasing rate of adoption, the team would likely look for collaborators to write other playbooks on other catechisms in the same position as the FC. If enough were written, these playbooks could be released in a collection.

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✅ Situation

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✅ Facilitator's Catechism v1.3
TeamName-Callsign v1.0

Providing Necessary Details

The Necessary Details are the nuts and bolts of the team. The Administration, Logistics, and Communications section has questions which ask for details about the project related to the areas defined in its title. This section provides an opportunity for the team to assess what resources, relationships, and information are required for or important to the project. As new needs are realized and old ones are fulfilled or deprecated, this section can be updated.

Some information asked for in this section might also be present in the header, but think of this as a necessary redundancy—someone looking at this section should be able to quickly find all of the Administrative, Logistical, and Communications related information necessary to understand the project. Use caution when attempting to decide what information is and isn't necessary to include—specifying norms and practices regarding communications, when the team will hold meetings, on what platforms they'll be held, how and where resources are stored, and who is on the team may all be important, but may also be overkill if your team already has explicitly or implicitly established norms and standards.

While most of the questions in this section ask for dry details, some questions require some real thought and consideration. Though no one likes to consider at the outset of an exciting or important project, it is also relevant to specify under what conditions the project should dissolve or reassess the situation (think of this like prenuptials for teams). Consider seriously the conditions under which the team should abandon the work or hold a meeting to consider what changes are necessary in order to continue the project.

Administration, Logistics, and Communications RMTR-FCP

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

R.J. Cordes is the Facilitator for this project, which is being hosted by Remotor. Standard Remotor Communications channels will be used, and the project will be discussed daily during already-scheduled morning sync calls. All drafting will be done in this collaborative document: Manuscript Draft

*If no meaningful work occurs by February 15th, 2021, the team will hold a meeting to reevaluate milestones or consider terminating the project.

✅ [PROJECT CALLSIGN]

✅ Full Title of Project

Project Callsign	xxx
Team Name	xxx
Facilitator	xxx
Contact Information	xxx
Date of Announcement	mm-dd-yyyy
Call for Collaboration Ends	mm-dd-yyyy / When Completed
Intended Date of Completion	mm-dd-yyyy / Not Yet Known

✅ Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

✅ Mission

Given the situation, what are the team's explicit objectives?

✅ Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

✅ Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

✅ Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? What else might be affected? What work will come next?

➡️ Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

✅ Facilitator's Catechism v1.3
TeamName-Callsign v1.0

Iterating and Adapting: Next Steps for your Team (and the FC)

The Facilitator's Catechism (FC) is meant to be a living document that is updated and iterated on over the project's life-cycle. As the project changes in response to new members, new perspectives, and new challenges, the FC should be updated to reflect these changes. At a glance, many assume that changes to projects reduce their likelihood of success—but lack of ability to adapt is a far more common culprit and a great deal of the impact of diversion from plans can be circumvented by goal-setting and accountability for those changes provided by documents like the FC.

While not required, it is recommended that the document itself be versioned if it undergoes notable changes or is going to be disseminated to individuals that are external to the team. Some FCs are versioned using Git or Google Docs which provide straightforward methods for named-versions—links to the current version of the document should be included in the footer with the team's call-sign. Another, maybe easier method, is to link to the directory where versions are held instead, so that even a disseminated document in a static pdf format can be used to find the most recent version.

Iteration and Adaptation is not just limited to the project's FC, it can also be extended to the structure of Facilitator's Catechism itself, and the facilitator's use of catechisms in general. Some organizations may find that specific aspects of the situation, such as a client ID or a ticket number, should be required in order to assess situations of a certain type, or that certain organizational roles need to be included in necessary details. The FC was built to be a foundational catechism from which other catechisms can be created (or cloned/forked, using the terminology of git versioning). Simply create a template which adds your organization's changes to questions and format and start testing its use. In the same way that project catechisms should be versioned, it is encouraged that your new catechism templates be versioned as well—and the footer should have the name of the catechism and version in use with a link so that other individuals can view and download the template. If the version is substantially different from the Facilitator's Catechism or designed for a specific use-case and you want it to be found and usable by others, you can submit it to us via a provided form so that we can catalog it with attribution [1].

Through 2021 and beyond, we intend to collaborate with organizations and individuals in the creation of new catechisms for specific use-cases, adding to the collection of existing project-catechisms such as The Innovator's Catechism, Waltz's Modeler's Catechism for Intelligence Analysis, The Heilmeier Catechism, and the Narrative Campaign Planner's

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[1] Remotor/COGSEC Catechism Submission Form: cogsec.org/CatechismCatalog

Catechism. We also hope to make and iterate on Playbooks such as this one, for other catechisms. As much as we hope to see the Facilitator's Catechism impact more organizations, it is second to the hope that we see your organization develop and share a catechism of its own. Further, we also intend to build tools which complement the use of catechisms, allowing the mapping of catechisms to various formats such as slide decks, canvases, and other catechisms, as well as connecting catechisms to task tracking frameworks. project management systems, CRM platforms, and to one another.

Tips and Tricks

Failing Fast. Each section should build on the previous section in a way that tells a clear story—if you're having trouble with any particular section, go back to the previous one and consider if the difficulty you're having is actually in the previous section. Don't be afraid to abandon the catechism and reconsider your project idea in general—**the Facilitator's Catechism is meant to prevent projects unlikely to succeed as much as it is meant to help communicate good ones.** The FC is built to act as a safety checklist—someone once suggested that DARPA's Heilmeier Catechism is a "Project Killer" because many idealized projects don't make it past its famous "Who cares? If you are successful, what difference will it make?" section, the response? **Aircraft technicians don't think of their safety checklists as "flight killers".**

Post-Mortems. Part of the value of operations orders is the ability to view them "after the action", and use them as a basis of comparing plans and predicted outcomes to actual results. There's a reason that so many High Reliability Organizations have processes to document their plans—it's not just annoying, bureaucratic work about work: **Organizations which don't document their plans are robbed of an opportunity to improve their reliability.** You can also perform pre-mortems—send the FC to others for feedback on potential risks!

Participation, Diversity, and Inclusion. The FC is often used as a basis for recruiting collaborators for teams! You can make a basic FC all by yourself, and then send it out to potentially interested people and organizations to see if anyone might be interested in working on the project—and tell them they are free to share it as well. This method, which was popularized by groups like Toyota's SMART teams, reduces bias in member selection due to the bottom-up and distributed nature of collaborator collection. It also allows for targeted reach-outs, and composition of unconventional teams.

Focus on the Mission. While many projects being managed by emergent teams, where individuals might not know each other very well or at all, often start with icebreakers and introductions—you'd be surprised by how ready many people are to just dive in and focus on their role in the work, and how well they'll get to know each other by doing so. In these polarized and volatile times, focusing on a short, well-scoped mission can reduce likelihood of interpersonal and political dramas.

Recursion. A project can be composed of multiple FCs and other catechisms!

Compare. It can be difficult to compare complicated project documentation—the FC is built to be compared against other FCs easily. If you have to choose from one of many project proposals or simply want to communicate them all, asking for submissions to be accompanied by an FC can make the task much easier!

Reach out. Do you have a Tip or Trick for the FC? Let us know and we may add it in a future version of this Playbook. Go to Cogsec.org/CatechismCatalog to find out how.

Supplemental Resources

Appendix A – Helpful Links

The Facilitator's Catechism Github Repository word templates and up-to-date google-doc templates for the Facilitator's Catechism are held here.	github.com/COGSEC/FacilitatorsCatechism
COGSEC's Catechism Catalog Where other playbooks and catechism materials will be held, and where catechisms and tips/tricks can be submitted.	cogsec.org/CatechismCatalog
The Great Preset: Remote Teams and Operational Art (Book) Contains the research that the FC and this document was built on.	cogsec.org/research-irt
Remotor Consulting Group Homepage Contains contact info for RCG	remotorconsulting.com
DARPA Heilmeier Catechism A short explanation of the Heilmeier Catechism	darpa.mil/work-with-us/heilmeier-catechism

Appendix B: The Facilitator's Catechism Template (v1.3)

Project Title

Project Call-Sign	x
Team Name	x
Facilitator	x
Contact Information	x
Date of Announcement	xx-xx-xxxx
Intended Date of Completion	xx-xx-xxxx

Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes? Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate? What will happen if this situation is not addressed?

Mission

Given the situation, what are the team's explicit objectives?

Potential Avenues of Approach

Given the situation and mission, what are the potential or current avenues of approach?
For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Implications of Outcome

If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members? If all or some milestones were achieved what does the success mean to stakeholders, the situation, and to team members?

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

Appendix C: RMTR-FCP Example FC

Facilitator's Catechism Playbook

Project Call-Sign	RMTR-FCP
Team Name	Remotor
Facilitator	R.J. Cordes
Contact Information	█████████████
Date of Announcement	02-04-2021
Intended Date of Completion	03-04-2021

Situation

What is the nature of the situation or problem the team is being formed to address? Are there known causes?

The Facilitator's Catechism has received positive feedback and seen successful implementation in domains such as hackathons, software development, and research work and derivative catechisms are being included in entrepreneurship curriculum at the university-level—despite these successes, it has had a low rate of adoption. Based on feedback, this is likely due to the lack of shareable, non-academic materials on its use.

Is the situation novel? If so, if there are traditional methods which would normally be used to address similar situations or problems, what are their limitations and why are they inadequate?

This situation is novel to Remotor, but there are numerous strategies available to increase adoption rate of tools.

What will happen if this situation is not addressed?

The adoption of The Facilitator's Catechism will have to rely on word-of-mouth and impact on project success—based on current adoption rate, it could take longer than a year to see this and derivative catechisms become commonly used.

Mission

Given the situation, what are the team's explicit objectives?

Enable individuals and organizations to rapidly adopt the Facilitator's Catechism.

Approach

Given the situation and mission, what are the potential or current avenues of approach?

For each potential or for the current approach: What tools, techniques, or expertise, alone or in combination, would be required or provide opportunities? What are the risks? What are the potential limitations?

We will write a simple, short, clear playbook for adopting and using the Facilitator's Catechism that can be distributed to organizations and participants of workshops. The playbook is a standalone "Who", "What", "Why", "Where", "When", and step-by-step "How" for using the Facilitator's Catechism (the deep-dives limited by the playbook approach are present in the original citation—which contains more historical and conceptual context). One key risk is the project running past expectations, causing pile-up with other planned projects. We will use standard Remotor Consulting Group tools, etiquette, and meeting protocol to stay on schedule and keep a rhythm to writing.

Milestones

Given the situation, mission, and the avenues of approach, what are the milestones that would best indicate the mission's progress?

Task	Expected	Completed
Writing	3/4/21	2/26/21
Part 1 Outline	2/5/21	2/5/21
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Part 2 Outline	2/19/21	2/18/21
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What work will come next?

If the playbook was successful in increasing rate of adoption, the team would likely look for collaborators to write other playbooks on other catechisms in the same position as the FC. If enough were written, these playbooks could be released in a collection.

Administration, Logistics, and Communications

Who is the facilitator responsible for the project's completion? Who, if anyone, is the team accountable to? What resources and support elements are required? What resources are already available and how can they be accessed? What are the requirements for participation? How will the group communicate? Where and how will the work be done? Under what circumstances will the project close and the group disintegrate? Who are the current collaborators?

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