

# **SUPERVISORY ENGAGEMENT SKILLS**

## **Structuring for Success: Effective Unit Meetings**

**Developed for  
Division of Children and Family Services**

**By  
Arkansas State University  
&  
UALR – MidSOUTH**

**Trainer Guide**

# Structuring For Success: Conducting an Effective Meeting

**Time:** 90 Minutes

**Audience:** DCFS Managers (All Levels)

**Rationale:** This workshop was developed to help supervisors and managers conduct effective meetings with their work unit staff. The material in this workshop is introductory and fairly basic. It is intended to lay a foundation for further, more in-depth trainings on administrative supervisory functions to improve practice.

## Competencies

**501-4** The supervisor can identify supervisory job roles and responsibilities that serve leadership, administrative, and supportive functions.

**504-5** The supervisor knows how to plan, organize, and lead effective meetings.

### Objectives: Participants will

- Know how to structure an effective meeting.
- Differentiate between issues that are brought to a group forum from those that are more effectively addressed in an individual session with an employee.
- Develop strategies to ensure regular group meetings and appropriate use of group time.
- Develop strategies to ensure effective follow through and set and monitor action steps between meetings.
- Develop strategies to form and lead effective work teams.

### Materials:

- Name tents and at least 5 different kinds of stickers
- Participant Manuals
- Handouts 1
- Mission Poster
- Practice Model Poster
- SEA poster
- Iceberg Poster
- Flip chart set up for each small group – pad, easel, markers, tape
- Flip chart set up for the trainer (if no white board is available).
- Easel or tape for posters

### **SET-UP Note:**

1. If possible, have the room set up in rounds for small group work.
2. Put blank name tents and markers on the tables.
3. On the inside of the name tents put a sticker. Be sure that the name tents on each table have at least five different stickers. This preparation will allow a quick division into smaller work groups. (Trainers may elect to use a different method to quickly make small work groups in a manner that separates people from the same unit or county/area.
4. Have the Mission Statement, Practice Model and SEA Posters displayed where they can be easily referenced.
5. On either the whiteboard or the trainer's flip chart, have the following quote:
  - a. "The Answers Are In the Room."

This training is designed to move quickly through the first parts. The introduction, ice-breaker and SEA materials are hopefully material that many in the group already know. The bulk of the training time needs to be used for the small group exercise and processing.

### **I. Introduction and Ice Breaker (15 minutes)**

- A. Introduce yourself to the class and briefly cover the need for training, training objectives and competencies addressed in the training. These are set out on **page 1** in the Participant Manual. Move quickly into the Ice Breaker.

#### **B. Ice Breaker**

##### Purpose

The purpose of this exercise is to have participants identify those things that make meetings productive and those things that are inefficient uses of meeting time.

##### Materials

Participants will need the Participant Manual and something to write with. Trainers will use the prepared name tents to quickly break the group up into smaller work groups. (Participants will stay in these groups for the rest of the exercise.)

##### Methodology

1. Divide the large group into smaller groups (5 or 6 depending on how many different stickers were used on the name tents. Tell them to take their "stuff" when they move to another table.

2. Direct participants to page 2 and ask them to take a minute to fill in the blanks on the page. One column addresses behaviors that make meetings productive. The other column addresses behaviors that distract or waste time. Give participants a few minutes to complete the page.
3. Ask participants to share (at their tables) the behaviors they identified.
4. Finally, ask participants to share with the larger group. (Depending on time, identify whether you want them to share all their work or just one thing from each column.)
5. Summarize with Handout 1 – Tips for Effective Meetings

### Processing

As each group reports out, reinforce appropriate responses. Ensure that any information on the handout that was not covered by one of the groups is brought to the group's attention. For the rest of the processing, segue into the next, brief section.

## **II. Practice Model, SEA Review (10 Minutes)**

- A. SEA (Support, Education, and Administrative) Functions: Briefly review the SEA poster materials. This poster represents the 3 main functions of supervision. Looking back at the things participants identified in the ice breaker, what functions of supervision were addressed?
- B. Practice Model Principles: Some people may not think of the practice model in relation to supervisory meetings with staff. Ask people to stop and take a minute to reflect on these parts of the practice model:
  - a. The entire system must support frontline practice to achieve positive outcomes with families (Support)
  - b. Every staff position, role, and activity of the Division shows continuous effort to build and maintain professionalism (All three)
  - c. Quality improvement and accountability guide all our work (Educational and Administrative)
- C. Draw the connection between these three principles and effective meetings with staff. This may include:
  - a. The purpose of the meeting may address any one of the 3 supervisory functions or be a combination.
  - b. Part of supporting staff involves clearly articulating expectations, follow through and consequences.

- c. Supervisors must model the behaviors they expect of their worker. So, if workers are to be professional in their dealings with families, supervisors must be professional in their interactions with staff. A professional supervisor makes the most of the meeting time.
- d. Meetings are one forum for directing quality improvement and accountability.

### III. **Small Group Work (60 minutes – 25 for group work; 35 for reporting and summarization)**

**Trainer Note:** If there are so many participants that you need to have 6 groups instead of 5, assign two groups to the topic of Developing Strategies to Ensure Regular Meetings and Effective Use of Time.

- A. Position for the rest of the session by pointing out that there is a wealth of experience in the room. The rest of this time will be used to develop strategies to address some aspect of effective meetings. Each small group will work on one aspect and then will share information with the other group members.
- B. There is support information in the Participant Manual for each group, so everyone will leave today with all the supporting information. There are also worksheets to record ideas and strategies from other groups.
- C. Each group will be facilitated by a University Field Trainer.
- D. Begin the small group work. Allow about 25 minutes of the remaining time for the groups to work. Sessions that the groups will work on include:
  - a. Strategies to ensure regular meetings and effective use of time (participant materials are on pages 3-6)
  - b. Strategies to address boundaries and ethics of meetings (participant materials are on pages 7-8)
  - c. Strategies for communicating next steps (participant materials are on page 9)
  - d. Strategies to maximize learning (participant materials are on 10-11)
  - e. Strategies to understand group dynamics to further the work of the team (participant materials are on pages 12-14)
- D. Call time and have the groups begin reporting out.

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**Trainer/Facilitator Resources**

This session will depend heavily on small group work. The assumption is that the information presented will not be new to many of the participants. It is further assumed that there is valuable experience in the room and that supervisors may learn as well from each other as they do from the trainer. The final assumption is that there are supervisors out there who do meet with their staff in a productive manner. Therefore, the focus of many of the small groups will be on developing strategies to overcome barriers to doing what they know needs to be done and strategies to make meetings as productive as possible.

The Handout that summarizes the first exercise sets out the skeleton for effective meetings, regardless of whether the purpose of the meeting is administrative, educational, supportive, or some combination of the three. Each member of each small group will have that information as a starting point for further work.

Small group facilitators will have a list of possible issues related to their topics. Hopefully, the group members will identify most of these issues. However, if the group does not, the facilitator can ask questions designed to put an issue on the table.

Participants may have some information in their manuals. For example, the small group that will look at adult learning styles and how they impact learning has a short review of the principles of adult learning. Facilitators need to give the group a few minutes to look the materials over before starting the discussions.

A summary handout for each small group is also included in the training materials. There should be enough of these handouts that each member of the large group will get a copy after the small group reports out.

## Group Facilitator Guide

### Strategies to Ensure Regular Meetings and Effective Use of Time

- ▶ Ask participants to list barriers for supervisors and barriers for workers to the following “tips for conducting an efficient meeting”. List barriers on the flip charts. (10 minutes)
- ▶ Next, ask participants to share strategies that they have used to overcome the barriers. List strategies on the flip charts. (15 minutes)

#### A. Articulate Purpose of the Meeting (includes the following):

- Establish why the meeting is important
- Decide what needs to be accomplished
- Decide on what you need from the meeting and what participants need to take away with them when the meeting is over
- Decide if the meeting is:
  - Informational
  - Problem Solving
  - Planning/Strategizing
  - Feedback/Evaluation
  - Discussion/Education
  - Decision Making
  - Validation/Celebration
  - Other

Barriers for Supervisors	Barriers for Workers	Strategies to Overcome Barriers
Examples: <ul style="list-style-type: none"><li>-Setting multiple purposes for one meeting</li><li>- Knowledge/Skill of Supervisor</li><li>-Setting purpose more appropriate to individual session rather than group</li><li>-Setting purpose as public criticism rather than constructive/positive action</li></ul>		



**B. Prepare for the Meeting** (includes the following):

- Clarify the purpose of the meeting, identifying desired outcomes
- Select appropriate meeting participants
- Set standardized time, place, and duration of meeting
- Clarify roles and responsibilities of participants
- Develop and disseminate agenda in a timely manner
- Seek input from participants on the agenda
- Send out any review or reading material prior to the meeting
- Make sure all materials needed for the meeting are ready at the time of the meeting
- Set expectation for attendance and clarify consequences for absenteeism

Barriers for Supervisors	Barriers for Workers	Strategies to Overcome Barriers
Examples: -Not setting aside adequate time to prepare for meetings -Assuming all roles and responsibilities for meeting -Receiving only negative or no input from participants -Getting reading material together in time to disseminate for participant review		

**C. Lead an Effective Meeting** (includes the following):

- Begin on time and end on time, have a time keeper
- Have attendance sheet signed or note attendees in minutes
- State the purpose
- Set norms for work: time allowed per item, interruptions, cell phones, participants flowing in and out of meeting, etc.
- Stick to the agenda
- Place most critical work in the middle of the agenda, controversial in the latter part
- Encourage and coach critical thinking/shared views, problem solving and decision making
- Summarize frequently, checking for understanding of content and consensus
- Be attuned to group dynamics, verbal and non-verbal communication
- Use positive and constructive feedback

Barriers for Supervisors	Barriers for Workers	Strategies to Overcome Barriers
Examples: -Rabbit Chasers/Tangent -Time Parasites/Spotlight -Targeting Individual Criticism -Keeping agenda and meeting focused -Participants not showing up on time, come and go, or leave early		

**D. End Meeting Effectively:**

- End on Time
- Make sure there is time for participants to return to even keel after dealing with difficult issues
- Identify action steps to be accomplished by the next meeting
- Identify persons responsible for action
- Identify any needed resources or assistance to complete assignments
- Set next meeting date
- Leave short amount of time for “other” or establish another avenue to address

Barriers for Supervisors	Barriers for Workers	Strategies to Overcome Barriers
Examples: -Staff introducing last minute items -Staff referring back to previous agenda items for additional conversation -Getting everyone to agree on next meeting date “There’s never a good time”		

## Group Facilitator Guide

### Boundaries and Ethics of Meetings

- ▶ Ask participants to share Boundary and Ethical conflicts that commonly occur around the preparation, conduct, or follow up with a meeting. List these on the flip charts. (10 minutes)  
**Note: This may necessitate the facilitator giving an example to start the conversation.**
- ▶ Next, tell participants to share Strategies that work to address Boundary and Ethical conflict. List these on the flip charts. (15 minutes)
  - A. Boundary/Ethics-Preparation for Meeting
    - Opportunity to be included in the planning
    - Informed of meeting, purpose, expectations for roles/responsibilities
    - Access to resources including agenda, supplies, reading materials

Boundary and Ethical Conflict	Strategies to Overcome Conflict
<p>Examples:</p> <ul style="list-style-type: none"><li>-Only certain participants know about the meeting in a timely manner</li><li>-None of, or only some participants receive reading/review materials at the same time</li><li>-None of, or only certain participants are informed of their roles for the upcoming meeting</li><li>-None of, or only certain participants are allowed to provide input on the agenda</li></ul>	

B. Boundary/Ethics-During the Meeting

- Respect for participants
- Dual relationships
- Derogatory language
- Personal and individual professional issues
- Confidentiality
- Collaboration
- Disputes among participants

Boundary and Ethical Conflict	Strategies to Overcome Conflict
<p>Examples:</p> <ul style="list-style-type: none"><li>-Supervisor maintains dual relationship with 1 or more workers and allows those relationships to impact how meetings are conducted</li><li>-Participants are allowed to use derogatory language about agency, clients, colleagues</li><li>-Disputes among participants are allowed to “play out” during the meeting</li><li>-Personal/individual issues are included in the meeting that are better suited to an individual session between the supervisor and worker (ie, performance evaluation, individual skill/knowledge deficiency, conflict among workers)</li></ul>	

C. Boundary/Ethics-End of Meeting

- Opportunity to be informed of “next steps” including any assignments and future meetings
- Opportunity to be included in “next steps”
- Equal access to any information, resources, or assistance to successfully complete “next steps”
- Consistent response to absenteeism

Boundary and Ethical Conflict	Strategies to Overcome Conflict
<p>Examples:</p> <ul style="list-style-type: none"><li>-Participants are singled out for assignments (good and bad)</li><li>-Participants are given preferential treatment regarding the opportunity to self select for assignments</li><li>-Participants do not have same consequences for absenteeism</li></ul>	

## Group Facilitator Guide

### Strategies for Communicating Next Steps

- ▶ Ask participants to identify effective strategies for developing follow up or “next steps”. List these on the flip charts. (15 minutes)
- ▶ Next, ask participants to identify effective strategies for communicating and monitoring follow up or “next steps”. List these on the flip charts. (15 minutes)

#### A. Successful Development of Next Step Strategies

- Clear articulation of tasks or action steps
- Clarity regarding roles and responsibilities related to tasks or action steps
- Clarity regarding options to resolve any barriers to action steps or for requests for help
- Prioritization of action steps: ex. have to, need to, want to
- Deadlines for action steps
- Development and clarity on any mid-line monitoring or reporting in activity
- Identification of any resources, assistance, materials needed to successfully complete action steps

Strategies for Developing Action or Next Steps
<p>Examples:</p> <ul style="list-style-type: none"><li>-Develop action steps in the meeting and summarize</li><li>-Outline action steps in the meeting minutes</li><li>-Ask participants to sign understanding of action steps and roles/responsibilities</li><li>-Ask participants to collaborate on assignments</li><li>-Lead participants to effective/efficient use of personal and professional strengths</li></ul>

B. Effective Monitoring Follow-Up and Next Steps

- Meeting record and minutes dissemination
- Consequences for absenteeism
- Reminders for actions steps and deadlines
- Effective monitoring, keep it simple and respectful of time
- Review of action steps on next meeting agenda

Effective Monitoring and Follow-Up on Action Steps
<p>Examples:</p> <ul style="list-style-type: none"><li>-Have someone record the minutes who is not involved in the meeting process</li><li>-Complete minutes immediately and disseminate within 48 hours</li><li>-Apply consequences for absenteeism promptly</li><li>-Alert all participants to the mechanism and timeframes for mid-line monitoring</li></ul>



## Group Facilitator Guide

### Strategies to Maximize Learning

- Your group is a little different. Start by giving your group a few minutes to look over the materials on adult learning. This material is on page 10 in the Participant Manual.
- List the barriers to staff learning, retaining and/or using information presented in meetings.
- Using what they know about the way adults learn, ask participants to strategize ways to deal with the following situations:
  - A. Identify things that motivate their workers to learn.

Strategies to Motivate Staff to Learn
<p>Examples</p> <ul style="list-style-type: none"><li>- External expectations (comply with formal authority's expectations)</li><li>- Social welfare motivation - improve ability to be of service or to provide better service</li><li>- Personal advancement - learn something because it will further personal career goals</li><li>- Escape/stimulation - the learning experience provides a break in routine</li><li>- Cognitive interest - motivated to learn because of interest in the subject</li></ul>

- B. Structure a staff meeting where the purpose is to make sure workers are aware of a change in CHRIS (or the facilitator can pick another topic - the idea is to have the supervisors think about whether they would just lecture, whether they would design an experience, how workers might best learn the material, etc).

Structure in Relation to Adult Learning
<p>Examples</p> <ul style="list-style-type: none"><li>- Does the subject matter require hands on application? For example, do you teach CHRIS by talking about it or be having staff do the screens?</li><li>- Be able to clearly explain what is new or different</li><li>- Be able to tell staff why it is important and how they will use it in the real world</li><li>- Is there a way to make the learning fun?</li><li>- Is it better to talk about it or read about it?</li></ul>

- C. Tap into your workers' knowledge, experience and competencies to further the learning in a manner that is safe and non-judgmental.

Strategies to Use Group Members' Knowledge
<p>Examples</p> <ul style="list-style-type: none"><li>- Ask to share experiences</li><li>- Use reflective listening or questioning to get workers to re-examine some of their attitudes and beliefs</li><li>- Be respectful</li><li>- Look for kernels of truth</li></ul>

## Group Facilitator Guide

### Strategies to Manage Group Dynamics

- Start by having your group look at the materials on pages 12-14. Due to time limits, since other groups are dealing with the Task-Oriented Roles, have your group focus on the Social (Maintenance) Roles and the Individualistic (Non-Group) Roles.
- Ask group members to identify which of the **social roles** they regularly assume (as opposed to someone else on their staff taking these roles). List these on the flip chart. Be attuned to variations in the group and ask group members about it.
  - Encourager: Praises the ideas of others.
  - Harmonizer: Mediates differences between group members.
  - Compromiser: Moves group to another position that is favored by all group members.
  - Gatekeeper/expediter: Keeps communication channels open.
  - Standard Setter: Suggests standards or criteria for the group to achieve.
  - Group observer: Keeps records of group activities and uses this information to offer feedback to the group.
  - Follower: Goes along with the group and accepts the group's ideas.

#### Examples

- Does the supervisor assume the gatekeeper role or is this formally or informally delegated to another staff member?
- Who is the process leader on their team? Does the supervisor fill both task leader and process leader roles?
- Why are social roles important?
- Who is your informal leader (or is there one)?  
How do you make sure you and this person are on the same page?

- Ask the group to discuss and share strategies they use to deal with the **Individualistic Roles**.
- Aggressor: Attacks other group members, deflates the status of others, and other aggressive behavior.
  - Blocker: Resists movement by the group.
  - Recognition seeker: Calls attention to himself or herself.
  - Self-confessor: Seeks to disclose non-group related feelings or opinions.
  - Dominator: Asserts control over the group by manipulating the other group members.
  - Help seeker: Tries to gain the sympathy of the group.
  - Special interest pleader: Uses stereotypes to assert his or her own prejudices

<p>Examples</p> <ul style="list-style-type: none"> <li>- How long do you listen to dominators before you intervene?</li> <li>- Should you listen to the dominator? (See if the group can get to the place where they understand that some of this behavior is not necessarily bad – it may indicate a need to pay more attention to the process parts of the meeting.)</li> <li>- Aggressive behavior – do you tolerate it and how do you deal with it?</li> <li>- How do you identify and address hidden agendas?</li> </ul>	
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## **Structuring for Success: Effective Unit Meetings**

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**UALR – MidSOUTH**

**Participant Manual**

## WELCOME

**Rationale:** This workshop was developed to help supervisors and managers conduct effective meetings. The material is intended to lay a foundation for further, more in-depth trainings on administrative supervisory functions to improve practice.

### Competencies Covered:

#### 501-4:

The supervisor can identify supervisory job roles and responsibilities that serve leadership, administrative, and supportive functions.

#### 504-5:

The supervisor knows how to plan, organize, and lead effective meetings.

### Training Objectives:

- Know how to structure an effective meeting.
- Differentiate between issues that are brought to a group forum from those that are dealt with at the individual level.
- Develop strategies to ensure regular group meetings and appropriate use of group time.
- Develop strategies to ensure effective follow through and set and monitor action steps between meetings.
- Develop strategies to form and lead effective work teams.

# The Answers Are In The Room

Murray Wilkinson

## ENGAGING STAFF IN PRODUCTIVE WORK:

### MEETINGS THAT WORK; MEETINGS THAT DON'T

All of us have been in meetings where everyone walked away feeling that the time was productive, knowing why we met, and knowing where we need to go from here. All of us have been in the other kind of meeting, too – the meeting where everyone left shaking their heads going “what was that all about?”

Think about these two situations for a minute. What made one meeting successful and the other a situation with lots of room for improvement? List the behaviors that occurred in each situation that made it what it was.

Productive	Time Wasters or Distractions

### Strategies to Ensure Regular Meetings and Effective Use of Time

Handout 1 has some helpful information about structuring a meeting for success. The thing is, most of us know what to do. The challenge is in getting it done! Your group will look at barriers to conducting effective meetings and share the strategies you have used to overcome these barriers.

**A. Articulate Purpose of the Meeting** (includes the following):

- Establish why the meeting is important
- Decide what needs to be accomplished
- Decide on what you need from the meeting and what participants need to take away with them when the meeting is over
- Decide if the meeting is:
 

Informational	Discussion/Education
Problem Solving	Decision Making
Planning/Strategizing	Validation/Celebration
Feedback/Evaluation	Other or combination

Barriers for Supervisors	Strategies to Overcome Barriers
Barriers for Workers	Strategies to Overcome Barriers



**B. Prepare for the Meeting** (includes the following):

- Clarify the purpose of the meeting, identifying desired outcomes
- Select appropriate meeting participants
- Set standardized time, place, and duration of meeting
- Clarify roles and responsibilities of participants
- Develop and disseminate agenda in a timely manner
- Seek input from participants on the agenda
- Send out any review or reading material prior to the meeting
- Make sure all materials needed for the meeting are ready at the time of the meeting
- Set expectation for attendance and clarify consequences for absenteeism

Barriers for Supervisors	Strategies to Overcome Barriers
Barriers for Workers	Strategies to Overcome Barriers

**C. Lead an Effective Meeting** (includes the following):

- Begin on time and end on time, have a time keeper
- Have attendance sheet signed or note attendees in minutes
- State the purpose
- Set norms for work: time allowed per item, interruptions, cell phones, participants flowing in and out of meeting, etc.
- Stick to the agenda
- Place most critical work in the middle of the agenda, controversial in the latter part
- Encourage and coach critical thinking/shared views, problem solving and decision making
- Summarize frequently, checking for understanding of content and consensus
- Be attuned to group dynamics, verbal and non-verbal communication
- Use positive and constructive feedback

Barriers for Supervisors	Strategies to Overcome Barriers
Barriers for Workers	Strategies to Overcome Barriers

**D. End Meeting Effectively:**

- End on Time
- Make sure there is time for participants to return to even keel after dealing with difficult issues
- Identify action steps to be accomplished by the next meeting
- Identify persons responsible for action
- Identify any needed resources or assistance to complete assignments
- Set next meeting date
- Leave short amount of time for “other” or establish another avenue to address

Barriers for Supervisors	Strategies to Overcome Barriers
Barriers for Workers	Strategies to Overcome Barriers

## Boundaries and Ethics of Meetings - Strategies for Safe, Respectful Work Places

Supervisors set the tone of the meeting environment. Supervisors are ethically responsible to foster a safe and respectful work place. Supervisors provide leadership in creating an atmosphere that provides a framework for ethical practice and decision making. Ok, with that said, HOW do we make this happen?

<p><b>Preparation for the Meeting</b></p> <ul style="list-style-type: none"> <li>• Equal/Equitable opportunity to be included in the planning the meeting</li> <li>• Uniform notice of meeting schedules, meeting purpose, and expectations for role and responsibilities</li> <li>• Equal/Equitable access to resources, including the agenda, supplies, reading/review materials</li> </ul>	<p><b>Notes</b></p>
<p><b>During the Meeting</b></p> <ul style="list-style-type: none"> <li>• Respect for participants</li> <li>• Dual relationships</li> <li>• Derogatory language</li> <li>• Personal and individual professional issues</li> <li>• Confidentiality</li> <li>• Collaboration</li> <li>• Disputes among participants</li> </ul>	<p><b>Notes</b></p>

**End of the Meeting**

- Opportunity to be informed of “next steps” including any assignments and future meetings
- Opportunity to be included in next steps
- Equal access information, resources, or assistance to successfully complete next steps
- Consistent response to absenteeism

### Strategies for Communicating Next Steps

Supervisors provide critical leadership in developing, communicating, and monitoring activity between meetings. It is imperative that supervisors put effective strategies in place to make sure that any activity, roles, responsibility and deadlines are clearly understood by all participants. Supervisors are also critical in making sure that any needed resources, materials/supplies and assistance are available to all participants for the successful completion of assignments. So, if we know that this is a key supervisory role, HOW do we make it happen?

Clear articulation of tasks or action steps	<b>Notes</b>
Clarity regarding roles and responsibilities	
Clarity regarding options to address any barriers	
Prioritization of action steps: <ul style="list-style-type: none"> <li>• Will do</li> <li>• Need to do</li> <li>• Want to do...</li> </ul>	
Deadlines for action steps	
Clarity regarding mid-line monitoring/reporting activity	
Identification of resources, assistance, materials	
Foster collaboration/team work	

## Strategies to Maximize Learning

If we go to the trouble of having a well-organized meeting, we really want people to remember the materials that were presented. Look over the information below about how adults learn. As supervisors, we want our staff to "commit to learning."

- ❖ Adults need to know WHY they should learn (What's in it for me and why should I care?)
  - Adults are goal oriented
  - Goals must be realistic and have a practical application in the real world of work
- ❖ Adults are ready to learn when they perceive there is a "need to know."
- ❖ Adults must be motivated in order to retain information.
- ❖ Adults bring a lifetime of experiences and competencies to the situation - understand that their experiences influence who they ARE. This experience will influence how they perceive new information.
  - Adults want to be the origin of their own learning and will resist activities they perceive as an attack on their competency
  - Adults need to be shown respect
  - Adult learning has ego involved -structure to reduce the fear of judgment during the learning experience
- ❖ Adults need practical, useful feedback to improve performance
- ❖ Adults need follow-up, coaching and support in order to transfer learning into their daily practice

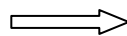
Materials adapted from Knowles, Horton and Swanson (the Gurus of Adult Learning information) - 1998 and Speck - 1996

## Learning Styles

**Visual Learner** - "gotta" see it

**Aural Learner** - "gotta" hear it

**Kinesthetic Learner** - "gotta" touch it



**SENSES**

**Social Learner** - learns best in groups; likes to bounce ideas off others

**Solitary Learner** - learns best in private situations; thinks about it to him or herself

What motivates your workers?	
How would you teach a policy, procedure or CHRIS change?	
How do you tap into experience and competencies of your staff in a manner that is safe and non-judgmental?	



## Strategies to Manage Group Dynamics

Work groups or intra-office teams are working on two levels at the same time. The first level is the content level. The information on Handout 1 covers some of the major issues related to the content level. But groups are also working on a process level. You can think of the content level as the tip of the iceberg and the process level is everything else going on under the waterline. Group process involves the personal needs of group members, informal leadership, group norms and hidden agendas. An effective supervisor has to be able to manage both the content and process aspects of a meeting. (Adapted from Kazemek, 1991). So, how are you **DOING** this?

**Traditional Group Roles** - Benne and Sheats (1948), Kazemek, (1991)]

***Role: recurrent patterns of behavior; can be formal or informal***

Task-Oriented Roles	Notes
<ul style="list-style-type: none"> <li>• Initiator-contributor: Generates new ideas.</li> <li>• Information-seeker: Asks for information about the task.</li> <li>• Opinion-seeker: Asks for the input from the group about its values.</li> <li>• Information-giver: Offers facts or generalization to the group.</li> <li>• Opinion-giver: States his or her beliefs about a group issue.</li> <li>• Elaborator: Explains ideas within the group, offers examples to clarify ideas.</li> <li>• Coordinator: Shows the relationships between ideas.</li> <li>• Orienter: Shifts the direction of the group's discussion.</li> <li>• Evaluator-critic: Measures group's actions against some objective standard.</li> <li>• Energizer: Stimulates the group to a higher level of activity.</li> <li>• Procedural-technician: Performs logistical functions for the group.</li> <li>• Recorder: Keeps a record of group actions.</li> </ul>	

### **Social Roles (Maintenance)**

- Encourager: Praises the ideas of others.
- Harmonizer: Mediates differences between group members.
- Compromiser: Moves group to another position that is favored by all group members.
- Gatekeeper/expediter: Keeps communication channels open.
- Standard Setter: Suggests standards or criteria for the group to achieve.
- Group observer: Keeps records of group activities and uses this information to offer feedback to the group.
- Follower: Goes along with the group and accepts the group's ideas.

### **Notes**

### Individualistic Roles (Non-Group)

- Aggressor: Attacks other group members, deflates the status of others, and other aggressive behavior.
- Blocker: Resists movement by the group.
- Recognition seeker: Calls attention to himself or herself.
- Self-confessor: Seeks to disclose non-group related feelings or opinions.
- Dominator: Asserts control over the group by manipulating the other group members.
- Help seeker: Tries to gain the sympathy of the group.
- Special interest pleader: Uses stereotypes to assert his or her own prejudices

### Notes

## **Structuring for Success**

### **Tips for Conducting an Efficient Meeting**

***Expectation: Supervisors at all levels will meet regularly with their staff***

**1. Purpose:** Be able to clearly articulate the purpose of the meeting

- A. What do you need to get accomplished
- B. What do you need people to take away with them when it is over
- C. Is the purpose:
  - i. Information sharing
  - ii. Discussion/education
  - iii. Problem-solving
  - iv. Decision making
  - v. Other

**2. Preparation:**

- A. Prepare an agenda
- B. Seek staff input when appropriate (what do they need to discuss)
- C. Identify who should attend
- D. If there is material with which they need to be familiar, send it out ahead of time so people can look it over
- E. Set aside a regular time so that staff can plan around it
- F. Set expectations for attendance and consequences for lack of attendance

**3. During the Meeting**

- A. Begin on time; end on time
- B. State the purpose
- C. Stick to the agenda
- D. Save controversial issues for last
- E. Encourage sharing of views – yours and staff (Remember, just because you sought an opinion does not mean that you are bound by it.)
- F. Check understanding of content and consensus
- G. Be attuned to group dynamics
- H. Use appropriate praise

#### **4. Ending**

- A. Review decisions made
- B. Identify action steps to be accomplished by the next meeting
- C. Assign responsibility for steps
- D. Distribute decisions and action steps in writing
- E. Set next meeting date (or remind staff if the meeting has a set date)

#### **BEWARE OF**

- Rabbit chasers (including yourself)
- Meeting Robbers
- Introduction of material that should be dealt with in an individual supervisory session
- Targeted individual criticism in the group setting

## MEETING PLANNER

**Who:** \_\_\_\_\_

**When:** \_\_\_\_\_

**Where:** \_\_\_\_\_

**Attendees:** \_\_\_\_\_

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**Purpose/Objectives:**

**Agenda (Attach)**

**Comments:**

**Decisions (Requiring no follow-up)**

**Next Steps:**

Who	What	When
1.		
2.		
3.		
4.		
5.		

**Source:** Turner, Ernie. The Team Approach: Steps & Tools. Intellitec Management System, White plains, New York: 1985. School Strategies & Options, P.O. Box 1705, Lunenburg, MA 01462.