Leadership Training Institute

Design Skills Workshop

Participant Manual

Commitment - Competency - Emotional Maturity

3-16-09

The manual is for the use of participants in the LTI Design Skills Workshop. Please credit the writer if you use sections of the material. Some material has been used in training programs for many years and the author is unknown. If you have information on the source of documents please offer it. Robert A. Gallagher, editor.

Design Skills Lab

From the web site description: Aims at developing skill in designing and conducting experiential and participatory education, meetings and programs. Attention is focused on identifying the interests and needs of participants, defining purposes, designing and conducting experience-based activities, and evaluating outcomes. The lab builds on and continues to develop the learning of the Human Interaction Lab.

Prerequisite Training Required: A Human Interaction Lab with LTI or another approved group or LTI's Conflict Management Workshop

Increased competency for:
1. Conducting experiential education interventions
2. Designing meetings and events that are more effective and participatory

For use in:
- Meetings
- Education & Training
- Programs

The LTI design skills lab will offer:
- experiential and theoretical training in the competencies
- for designing and implementing events
- with an appropriate degree of participation and/or
- in an experiential manner

The lab is an introductory program: Your ability to effectively design and implement events, make interventions in systems, and facilitate meetings also requires skills in group development, facilitation skills, intervention theory, and knowing a variety of intervention, educational, and group methods.

Conditions for Laboratory Learning

A laboratory experience can he1p you develop clearer ideas of the consequences of your behavior. You can discover alternatives to that behavior, decide whether you want to change it, and (if you do) choose and practice alternatives. You are more likely to feel free to do these things when the following conditions exist:

PRESENTATION OF SELF Until individuals have had (and used) opportunities to revel how they see and do things, they are not likely to receive information that will help them decide whether they want to make behavioral changes.

FEEDBACK Individuals do not learn from presentation of self alone. They learn by presenting themselves as openly as possible in a situation where the can receive from others clear and accurate information about their behavior -- a feedback system which informs them of how their behavior is experienced by others and what the consequences of that behavior are.

ATMOSPHERE An atmosphere of trust and non-defensiveness is necessary if people are to feel free to present themselves, to accept and utilize feedback, and to offer it to others.

EXPERIMENTATION Unless there is opportunity to try out new behaviors, without having to be certain in advance of what the outcome will be, the individuals are inhibited in utilizing the feedback they receive.

PRACTICE If their experiments are successful, individuals then need to be able to practice new behaviors so that they become more comfortable with changes they have decided to make.

APPLICATION Unless learning and change can be applied to back-home situations, they are not likely to be effective or lasting. Attention needs to be given to helping individuals plan for using their learnings after they have left the laboratory.

RELEARNING HOW TO LEARN Because so much of our traditional academic experience has led us to believe that we learn by listening to (or reading) experts, there is often need to 1earn how to learn from this experiential model: presentation ...feedback ... experimentation. ., presentation ...feedback ... etc.

COGNITIVE MAP Knowledge from research, theory , and experience is needed to enable the participant to understand his or her experiences and generalize from them. Generally this information is most useful when it follows or is very close in time to the experience.

The T Group creates a situation in which these conditions may come into being, allowing each member to play a part in his or her own learning experience and in the learning experience of others in tile group

*See also Porter, "Group Norms: Some Things Can't Be Legislated"

Lab education norms

What helps maximize the learning experience?

These norms are not judgments about "right" or "wrong" behavior. They represent the gathered wisdom of what seems to be most useful if you want to learn in this situation.

1. Accepting responsibility for your own learning. Actively making use of the resources and methods available in lab type workshop. Putting on the shelf your impulses toward passivity and cynicism.

2. Self-disclosure, asking for feedback, working at self-observation and insight,

3. Helping to build a learning community – being on time, focusing on your own learning and being willing to assist in the learning of others by offering feedback and observations.

4. Avoiding distractions – being at all sessions and not allowing other things to interfere; taking care about drinking alcoholic beverages before a session, not getting involved in an intense relationship with another participant or trainer.

5. Staying in the "here & now" vs. the "then & there" – we learn by reflecting on the behaviors in the group. We learn from disciplined reflection on experience that we have in common.

6. Keep it in the group – Keep the reflection – learning process in the group not in outside conversations. And, don't tell others not in the workshop about what other participants say and do.

Standards
You will need to leave the workshop if –

1. You are very late for a session or leave early
2. You walk out of a session (for whatever reason – upset, angry, etc.)
3. You are, in the opinion of the trainers, significantly interfering with the ability of others to learn. For example, being drunk, being threatening in some manner.

Role of Trainers – (more in LTI HI participant manual)

- To help the group and individuals analyze and learn from what is happening in the group.
- To offer theory, a model or research
- To encourage the group to follow norms that tend to serve the learning process
- To offer training and coaching in skills that tend to help the learning process
- To not offer structure or an agenda. To remain silent, allowing the group to experience its anxiety about acceptance, influence, etc.
- To be willing to disclose oneself, to be open with the group. On occasion being willing to offer feedback and challenge a participant
- To avoid becoming too directive, clinical, or personally involved.

T-Groups

History

In 1947, the National Training Laboratories Institute (NTL) began in Bethel, ME. They pioneered the use of T-groups (Training –Groups using laboratory education methods) in which the learners use here-and-now experience in the group, feedback among participants and theory on human behavior to explore group process and gain insights into themselves and others. The goal is to offer people options for their behavior in groups. The T-group was a great training innovation which provided the base for what we now know about team building. This was a new method that would help leaders and managers create a more humanistic, people serving system and allow leaders and managers to see how their behavior actually affected others. There was a strong value of concern for people and a desire to create systems that took people's needs and feelings seriously.

Objectives of T-Group Learning

The T-Group is intended to provide you the opportunity to:

- Increase your understanding of group development and dynamics.
- Gaining a better understanding of the underlying social processes at work within a group (looking under the tip of the iceberg)
- Increase your skill in facilitating group effectiveness.
- Increase interpersonal skills
- Experiment with changes in your behavior
- Increase your awareness of your own feelings in the moment; and offer you the opportunity to accept responsibility for your feelings.
- Increase your understanding of the impact of your behavior on others.
- Increase your sensitivity to others' feelings.
- Increase your ability to give and receive feedback.
- Increase your ability to learn from your own and a group's experience.
- Increase your ability to manage and utilize conflict.

Success in these goals depends, to a large extent, on the implied contract that each participant is willing to disclose feelings that she or he may have, in the moment, about others in the group, and to solicit feedback from the others about herself or himself. The focus is upon individual learning; some participants may learn a great deal in most of the above areas, others learn relatively little.

Method

One way of describing what may happen for a participant is --

1. Unfreezing habitual responses to situations -- this is facilitated by the participant's own desire to explore new ways of behaving and the trainer staying non-directive, silent, and providing little structure or task agenda
2. Self generated and chosen change by the participant - Experiment with new behaviors -Practice description not evaluation of behavior.
3. Reinforce new behavior by positive feedback, participants own assessment of whether what is happening is closer to what she/he intends, supportive environment, trust development

Sources of Change in Groups

- Self-observation - participants give more attention to their own intentions, feelings, etc.
- Feedback - participants receive information on the impact they have on others
- Insight - participants expand self-knowledge
- Self-disclosure - participants exposes more of themselves to others
- Universality - participants experience that others share their difficulties, concerns or hopes
- Group Cohesion - participants experience trust, acceptance & understanding
- Hope - participant see others learn, achieve their goals, improve, and cope more effectively
- Vicarious Learning - participants pick up skills and attitudes from others

- Catharsis - participants experience a sense of release or breakthrough

A Description
The T-group provides participants with an opportunity to learn about themselves, their impact on others and how to function more effectively in group and interpersonal situations. It facilitates this learning by bringing together a small group of people for the express purpose of studying their own behavior when they interact within a small group.

A T-Group is not a group discussion or a problem solving group. The group's work is primarily process rather than content oriented. The focus tends to be on the feelings and the communication of feelings, rather than on the communication of information, opinions, or concepts. This is accomplished by focusing on the 'here and now' behavior in the group. Attention is paid to particular behaviors of participants not on the "whole person", feedback is non-evaluative and reports on the impact of the behavior on others. The participant has the opportunity to become a more authentic self in relation to others through self-disclosure and receiving feedback from others. The Johari Window is a model that looks at that process.

The training is not structured in the manner you might experience in an academic program or a meeting with an agenda or a team with a task to accomplish. The lack of structure and limited involvement of the trainers provides space for the participants to decide what they want to talk about. No one tells them what they ought to talk about. The lack of direction results in certain characteristic responses; participants are silent or aggressive or struggle to start discussions or attempt to structure the group.

In the beginning of a T-Group participants are usually focused on what they experience as a need for structure, individual emotional safety, predictability, and something to do in common. These needs are what amount to the tip of the iceberg in most groups in their back home situation. By not filling the group's time with answers to these needs, the T-Group eventually begins to notice what is under the tip of the iceberg. It is what is always there in any group but often unseen and not responsibly engaged . So, participants experience anxiety about authority and power, being include and accepted in the group, and intimacy.

Depending on forces, such as, the dynamics of the group, the past experience and competence of participants, and the skill of the trainers -- the group, to some extent, usually develops a sense of itself as a group, with feelings of group loyalty. This can cause groups to resist learning opportunities if they are seen as threatening to the group's self-image. It also provides some of the climate of trust, support and permission needed for individuals to try new behavior.
As an individual participant begins to experience some degree of trust (in themselves, the group and the trainers) several things become possible --

- The participant may notice that his/her feelings and judgments about the behavior of others is not always shared by others. That what he/she found supportive or threatening was not experience in that way by others in the group. That how one responded to authority, acceptance and affection issues different from that of others (more related to ones family of origin than to what is happening in the group). Individual differences emerge in how experiences are understood.
- The participant may begin to try on new behavior. For example, someone who has always felt a need to fill silence with noise and activity tries being quieter and still.
- Participants begin to ask for feedback from the group about how their behavior is impacting others.
- Participants may find that they are really rather independent and have a relatively low level of anxiety about what is happening in the group. They will exhibit a broader range of behavior and emotions during the life of the group. In fact their leadership is part of what helps the group develop.

The role of the trainers

- To help the group and individuals analyze and learn from what is happening in the group. The trainer may draw attention to events and behavior in the group and invite the group to look at its experience. At times the trainer may offer tentative interpretations.

- To offer theory, a model or research that seems related to what the group is looking at.
- To encourage the group to follow norms that tend to serve the learning process, e.g., focusing on "here & now" rather than the "then & there".
- To offer training and coaching in skills that tend to help the learning process, e.g., feedback skills, EIAG, etc.
- To not offer structure or an agenda. To remain silent, allowing the group to experience its anxiety about acceptance, influence, etc.
- To be willing to disclose oneself, to be open with the group. On occasion being willing to offer feedback and challenge a participant
- To avoid becoming too directive, clinical, or personally involved.

Possible Problems

- T-Group methods usually encourage self-disclosure and openness, which may be inappropriate or even punished in organizations. This was an early learning. When managers thought they could take the T-group method into the back home organization, they discovered that the methods and the assumptions of a T-group did not fit. T-groups consisted of participants who were strangers. They didn't have a history or a future together and could more easily focus on here and now behavior. Another issue was that in the organization there were objectives, deadlines and schedules related to accomplishing the work of the company or group. Groups with a task to accomplish could not take the same time that would be used in a T-Group. These difficulties helped lead to the development of Organization Development and team building. What had been learned in T-Groups was combined with other knowledge and these new disciplines emerged as ways to address the values raised by the T-Group experience.
- The T-Group experience can open up a web of questioning in a participant. Ways of behaving that the person has used for many years may be called into question by others in the group and oneself. This has in some cases brought the participant to question relationships in the family or at work. While this can be a very constructive process that leads to the renewal of relationships, it has on occasion lead to the breakdown of a relationship. While such a breakdown may have, in time, come to the relationship without participation in a T-Group, it remains a painful and possibly damaging experience.
- Participants being forced or pressured to attend, by an employer or other person with influence, are on the whole less likely to have a positive learning experience. Employers or others who want to require the participation of others may enhance the chance of having a productive outcome if -- they attend a lab themselves before sending others; they speak with the lab coordinator before the event to discuss what might realistically be expected and what the leader could do to assist in the learning process when the participant returns home.
- Very rarely there have been situations in which a participant has a psychiatric problem. One report said "The possibility of negative psychiatric effects of ST, and especially its role in inducing psychiatric symptoms, is yet to be clarified." This reinforces the value of participation based on intrinsic motivation; a norm that discourages people in therapy from attending without the approval of their therapist; and trainers staying focused on the learning areas suited for T-Group experiences.

An Introduction to Three-Phase Leadership Training

(For Church Related Participants)

By Kay Collier-Slone, Ph.D.

A leader is defined by the dictionary as one who points or directs others toward a desired goal
Process is described as a series of operations or set of procedures which lead to a specific or predictable end

During the Leadership Training Institute, we look at our roles as leaders in the church in terms of ***process.*** We believe our leadership will be effective because we understand the philosophies underlying good leadership and effective development of groups and working relationships, regardless of content, have ***experienced*** leadership in this sense and ***practice and live*** it. We believe leadership is effective *not* because we are first in terms of being a hierarchical authority, but because we have *first* learned the skills that are needed to undergird our work, and can therefore utilize the skills to allow exciting opportunities to happen. It will be effective because we have first engaged our own humanity and thus learned true humility, which leads to true understanding of and engagement with other human beings. It will be effective because we will have discovered that one of the most exciting endeavors in the world is enabling the continuing growth of human beings.

There are many types of leadership training offered by various groups within the Episcopal Church; EFM Mentor Training; training for Stephen Ministry; DOCC small group leadership; Women of Vision, and New Connections Small Groups, to mention only a few. There are also many on-denominational forms of training for group leadership such as those offered by Campus Crusade for Christ and Young Life. There are also individual leadership experiences offered by business, industry and in the private sector. Most people come to LTI after experiencing many other forms of 'training.' Therefore, when a team comes together to work as leaders of any constituency or content, we bring different ideas, skills and emphases. Many of these training models are at least in part theoretically based on the work of an English psychiatrist named Bion, and the work of Kurt Lewin, or perhaps a second or third generation adaptation of their work. In this country, the derivative models have come out of the world of Behavioral Science. The Episcopal Church, in particular, and others, such as the United Church of Christ, the Presbyterian and the Methodist were particularly instrumental in the 1960's and 1970's in working at the "point where psychology, applied behavioral science and religion meet" to establish training models and organizations utilizing principals which were understood and accepted to be philosophically and theologically compatible with the belief system of the Church and the model offered to us in the life of Jesus. It was the hope of those who worked in this field that such training would not only train leaders to carry on the work of the Kingdom, but also further enable us to live up to our Baptismal covenant to "respect the worth and dignity of every human being."

It is no accident that such diverse church leadership organizations as The Alban Institute (training and consulting for churches), Cornerstone Project for Clergy Development, EFM, DOCC, Servant Leadership Development, Church Development Institute, Shalem Institute and others were designed by individuals who came out of this system of leadership training.

There are many models which have been designed around a particular task or content (such as those above). LTI endeavors to offer a form of training which gives a common theoretical and experiential base of understanding and a common language to leaders working within the church, regardless of content or constituency.

The core ingredients of this training include:

- Self-insight
- Better understanding of other persons and awareness of one's impact on them
- Better understanding of group processes and increased skill in achieving group effectiveness
- Increased recognition of the characteristics of larger social systems

- Greater awareness of the dynamics of change
- Greater awareness of how conflict can be managed and utilized
- Greater skills in discovering needs of a community , and skills for planning and administering experiences which meet those needs

Human beings and groups of human beings are constantly changing. Issues that were critical to individuals or the total group when they first gather may evaporate by session four. The excitement in session three is followed by boredom in session seven. Issues not dealt with in any session escalate and eventually explode into the group at some point. Moods fluctuate, central concerns grow and decline in importance. Groups, like individuals, are unique, but they also share some common and predictable attributes. The predictive aspect offers comfort to one who is called to lead: events will not always be as conflicted, as sluggish, as exciting or as ideal as they appear to be in a given session. And, there are predictable ways to behave as a leader that produce predictable results -- both positive and negative.

LTI utilizes a model known as ***experiential*** *or* ***laboratory learning***. In a laboratory we perform experiments and analyze the results. In our work, we will have a life together which we will put under a behavioral microscope to see how we interact as we work. *Process time,* when we look at what we have been doing and how it impacted us and others in the group is an essential aspect of leadership development. Thus, every aspect of our life together in this LTI, and future modules, will be about who each of us is as a leader.

This is a *beginning* training, which, together with a group development and design skills training, will offer you basic skills and insights. There is much more available. My hope is that each participant in an LTI will be excited by the learnings and anxious to become a life-long learner of human growth, development and interaction. That the beginning skills of this time together will go with each person into their daily life and work to be sharpened and deeply integrated into each individual. That each will seek out fine leaders under whom to be in other "laboratories for learning" in other times and places, to further awareness of self, of others and of leadership styles. And that, as learnings are put into practice over a period of time, some will choose to seek even further training to enable them to train others.

Jesus said, "Love thy neighbor as thyself." All too often, I believe the *order* of that commandment is confused, and we humans attempt to love our neighbors-and work with them-without knowing or loving ourselves. And so, we begin with ourselves-that our offering to all others whose lives we touch will truly be loving; will truly "respect the worth and dignity of every human being."

Editor’s Note: Three-phase training is an expression used to describe a package of weeklong training workshops that usually includes Human Interaction, Group Development and Design Skills.

Learning from Experience

It is a core assumption of lab training that we do not learn from experience itself; we learn from disciplined reflection on experience. The learning process is really one of learning about our experience from a structured reflection on our experience. The method offered here is called --- E - I - A - G.

E – Experience
I – Identify
A – Analyze
G – Generalize

This has been a core learning method in lab training. With adaptation it has been used in team development and Organization Development efforts.

Experience – This is anything that happens in the group. The behavior of the group or people within the group becomes the starting place for learning.

Identify – A specific behavior or pattern of behaviors is selected as a starting point. The group needs to identify what happen, when it happen, etc. The objective is for all the group members to adequately recall the experience so they can all contribute to the learning process. The assumption is that everyone may be able to learn from the experience.

Analyze – The group explores and examines the experience that has been identified. The group may look at the impact or effect of the behavior(s); sharing how they felt, what they thought, how they acted, etc. Judgments each person made may be shared – was the behavior helpful or hindering to the group's life and work? Analysis may include relating the experience to some theory, model or research.

Generalize – This is an opportunity for group members to state what they have learned; to generalize what has been learned into other situations. Based on the analysis, the members state what they might do in a similar situation, what they might have done differently in this situation, what conclusions they have drawn, etc. Members will not necessarily share the same learnings. In lab training two norms are useful in the "Generalization" discussion. First – Each person has his or her own learning. That learning has its own validity. It doesn't need to be shared by others to be legitimate. Second – It is acceptable for members to ask each other for information about the basis for stated learnings or generalizations.

The Reflection Process

First, be clear about roles

Name those in the group who share, first hand, the experience being explored. These are the people who will need to do most of the work in the process and draw the learnings. Others serve in a support role -- offering suggestions to consider based on similar experiences and the common skills and knowledge they share. In a training group it is usually best for the learning process if the experience being reflected on is shared by all group members.

E – Experience	This is the experience you have already had. It is the base for the process. The disciplined learning process really starts with **I – Identify**

I – Identify	An event in the life of the group that you want to use to learn from. 1. Select an event. 2. Describe the event so everyone understands what is being discussed. 3. Each person that was present during the event share what they saw, heard, felt. What behavior did you observe in yourself and others?
A – Analyze	Think about what happened 1. Share about the event -- *Concerns* *Likes* 2. What helped or hindered the group • in terms of its task? • in terms of its trust? • in terms of _____? 3. What was the effect on you? What did you say and do? What were your feelings and thoughts? 4. Use appropriate theory, models or research to explore the event.
G – Generalize	State what you have learned 1. What would you do in a similar situation in the future? What would you repeat? What would you do differently? 2. State anything you have learned.

Learning From Experience: Worksheet

Sometime sit is useful to have group members use a worksheet in doing the EIAG.

A. The group -- Identify a significant event that it wants to explore

B. Each person uses this worksheet in an individual exploration

1. During the event what did you
- Observe?
- Feel?
- Think ?

2. What did you do during the event; what was your behavior?

3. What did you see as your choices at the time; what choices were you aware of? Was there something you thought of doing and now wish you had?

4. How did you block yourself from acting? What messages did you give yourself that interfered with your ability to act?

5. Is there anything you wish you had done differently?

C. Share what you want to share with the group.

Thinking and Feeling

Thinking and feeling are the two major ways by which we interact with our interpersonal environment. Both are essential to constructive communication. In general, thinking ("head talk") leads to an *explanation* of the interactive situation, while feeling ("gut talk") leads to an *understanding* of it. Head talk is the prose of communication; gut talk is the poetry.

"Think" statements refer to the denotative aspects of the environment. They attempt to define, assert, opine, rationalize, or make causal connections between environmental events. Think statements are bound by the rules of logic and scientific inquiry; they may be true or untrue. Many times a think statement can be proven or disproved. Think statements require words to be communicated.

Most of us have been trained to emit thinking statements exclusively. We are constantly engaged in cognitive work: observing, inferring, categorizing, generalizing, and summarizing; occasionally we report to others what goes on in our head. Frequently we are asked for facts ("Where did you put the car keys?", opinions ("Which tastes better, California or imported wine?"), speculation ("What happens when we achieve zero population growth?"), or even indefinite thoughts, sometimes, just a "What are you thinking about?" Human beings like to think, and our ability to do it is usually on the short list of characteristics which distinguish us from orangutans.

Laboratory learning places great emphasis on feelings. Many participants in groups learn quickly that beginning sentences with "I think" is bad form, so they preface their remarks with "I feel" and go on to report thoughts. This bogus use of "I feel" often muddles communication.
I. "I feel like having a drink" is no expression of feeling but merely a shorthand way of saying, "I'm thinking about having a drink, but I'm still undecided." Here, "feel" is used to express an indefinite thought.
2. "I feel that Roger's brashness is a cover for his insecurity " is not an expression of feeling but a statement of opinion, an offering of an hypothesis.
3. "I feel that all men are created equal." An abstract principle can't really be felt; this is a *statement of belief*, an expression of faith in someone or something. It is really more accurate to say, "I believe that all men are created equal."

Watch yourself when you say, "I feel *that..."* It' s a tip-off that you are making a think statement, with a feel prefix.

"Feel" statements refer to the connotative aspects of the environment. They attempt to report our internal affective, immediate, non-rational, emotional, "gut" response to environmental events. Usually, feel statements are personal and idiosyncratic in that they refer to inner states, what is happening inside of us. Feel statements, like dreams, cannot be true or false, good or bad, but only honestly or dishonestly communicated. Feel statements may not require words at all; when they do, they usually take the form of "I feel {adjective)" or "I feel {adverb)".

Many of us have conditioned ourselves to screen out awareness of internal reactions. We may allow ourselves to report feeling "interested" or “uncomfortable, " but deny ourselves more intense or varied reactions. Laboratory learning emphasizes feeling states precisely because of this conditioning and denial. By getting in touch with our inner events, we enrich our experiences with the reality surrounding us. Changes inside of us provide direct cues to the feelings we are experiencing. A change in bodily function muscle tightness, restlessness, frowning, smiling, inability to stay with a conversation --tells us how we are reacting to what is happening. The sudden emergence of fantasies, impulses ("I want to go over and sit by Kathy") or wishes ("I wish Tom would shut up") into our consciousness can provide immediate entry into the rich and productive area of feeling communication if we can express them.

Sometimes we can also become aware of what is blocking our awareness of what we are experiencing. *Shame* is one kind of block, especially when the impulse sounds childish or regressive. *Fear* that if we communicate wishes, overt behavior will result is another bugaboo. It is a left over from the magical thinking of childhood. Often, we have a clear *expectation of judgment* from others if we dare to express ourselves. In a well-functioning group, these blocks do not correspond to reality. It can be truly liberating to express your feelings without shame, fear, or judgment.

SOME PITFALLS IN DEALING WITH FEELINGS

Projection occurs when we deny our own feeling and attribute it to another. It is a common happening in groups and involves many distortions. Frequently, projections are made in an attempt to justify our own biases and prejudice.

Judging motives in others is guesswork which escalates misunderstanding. It is a sly way of focusing on another's feelings instead of your own and an entry into the intriguing but time-wasting game of explaining *why* someone is feeling the way they do. If you want to read minds, start with your own.

Metafeelings are thoughts and feelings about feelings. Metafeelings garble communication and often make it impossible to know where you are coming from. It is a way of distancing yourself from the immediate event and you run the risk of intellectualizing a potentially rich feeling experience. Beware of exchanges which begin, "I'm sort of guessing that when I think I'm sort of feeling that. .." You will get nowhere.

OWNING YOUR THOUGHTS AND FEELINGS

Effective communication occurs when the communicators take responsibility for their thoughts, feelings and overt behavior, when they *own* what they do. Blaming, imputing motives, claiming that "the devil made you do it" are sneaky, dishonest attempts to be irresponsible. When you own your thoughts and feelings, the other person knows where you are and can respond more authentically to you.

The T -Group provides an excellent opportunity for individuals to consciously examine his/her use of thinking and feeling statements. Frequently, a facilitator will raise the issue when a statement is misused. Sometimes the participant discounts this clarification and thinks the facilitator is being too "picky"; however, focusing on the language usage helps us determine what our actual thoughts and feelings really are sometimes activities can help sharpen the usage. For example, an individual or group can practice negative behavior such as, blaming or imputing motives, and then process the experience. Another exercise is to devise a list of think statements and masquerade them as feel statements.

Whatever the process used to draw attention to the statements, the result is greater consciousness of our language about feeling and thinking and the congruence with behavior.

Adapted from 1983 Annual Handbook of Group Facilitation: University Associates

Feelings

Sad

High	Medium		Low	
Bleak	Grim	Dejected	Moved	Ashamed
Blue	Helpless	Discouraged	Shame	Bored
Crestfallen	Hopeless	Dismal	Solemn	Cheerless
Depressed	Melancholy	Dispirited	Sullen	Disappointed
Devastated	Mournful	Down	Unhappy	Embarrassed
Disconsolate	Sorrowful	Downcast		Hurt
Empty	Woebegone	Heavy		Pained
Grieving	Woeful	Lonely		Somber
		Morose		Uninterested

Afraid

High	Medium		Low	
Alarmed	Agitated	Startled	Concerned	Timid
Distressed	Anxious	Tense	Coy	Timorous
Fearful	Apprehensive	Troubled	Diffident	Uneasy
Frightened	Fainthearted	Uptight	Doubtful	Unsettled
Ghastly	Insecure	Worried	Dubious	Unsure
Panic-stricken	Jittery		Edgy	Vulnerable
Petrified	Nervous		Fidgety	
Scared	Perturbed		Restless	
Shocked	Pessimistic			
Terrified	Shaky			

Mad

High	Medium		Low
Angry	Aggravated	Animosity	Sore
Boiling	Exasperated	Enmity	"Teed off"
Enraged	Frustrated	Ireful	Uneasy
Fuming	Incensed	Irked	Unhappy
Furious	Indignant	Miffed	Unsettled
Hateful	Inflamed	Peeved	Vexed
Hostile	Vengeful		
Infuriated	Worked-up		

Glad

High	Medium		Low
Alive	Comfortable	Peaceful	Blithe
Cheerful	Content	Pleased	Blithesome
Delighted	Enchanted	Rapturous	Tranquil
Ecstatic	Exalted	Serene	
Elated	Exquisite	Spirited	
Energetic	Gay	Vibrant	
Excited	Gleeful	Warm	
Exuberant	Hilarious	Zestful	
Happy	Jolly		
Jubilant	Jovial		
	Lighthearted		

Theory of Interpersonal Relations
Basic Concerns of Any Group - ICA

by Bill Schutz

One of the ways of looking at what happens when people gather in a group includes three basic concerns:

Inclusion: *Who else is here?*
Who can I be in relation to them?
What will it cost to join?
How much am I willing to pay?
Can I trust my real self to them?
Will they hold me up if I am falling?

Control: *Who is calling the shots here?*
How much can I push for what I want?
What do they require of me?
Can I say what I really think?
Can I take it if they say what they really think?

Affection: *Am I willing to care?*
Can I show my caring?
What will happen if I show I care for one person before I show caring for others?
What if no one cares for me?
What if they do?
What if I don't really ever care for some people in the group?
Will the group be able to bear it?

When confronted by the end of its life together, the process tends to reverse itself from I-C-A to A-C-I.

- We begin to pull back a little from affectional ties we know have no real future.
- We begin to get embroiled again in a game of "Who's boss here anyway?"
- We start to wonder if we really want to put in the time and effort to stay with the group.

It is important to realize that these concerns overlap during the life cycle of a group, although one of the three concerns may be more dominant than the others at any given period of time.

ICA Questions

Inclusion questions

Some members frequently participates more than others, is there any member including yourself ,who, in your opinion participated more than others? And how did you handle it?

Is their anyone, in your opinion, who seemed to withdraw from the group and hardly participate at all? And how did you handle it?

Is their someone in the group who tries to give the impression that he is a high status member of the group and what he has to say should be listened to? And how did you handle it?

In many groups there is some member who's mood seems to be contagious in the group? Whether joking or light hearted, very serious and intent, or perhaps sarcastic and ridiculing? How did you respond to this person?

Control Questions

In some groups there is a member who disrupts the groups functioning by being bossy, dominating and aggressive? In your opinion is there any member, including yourself that did this? What did you do?

Was there anyone, in your opinion, who didn't take on their share of the responsibilities?

Who seemed to have the most influence? What did the person do?

Is there anyone who seemed to have exceptionally good ideas? Anyone who for any reason didn't seem to grasp basic principles?

Affection Questions

Is there anyone in the group who seemed to try excessively hard to be liked?

It often happens that some group members give the impression that they don't care at all whether people like them or not? Is there any one in this group who gave you that impression?

In many groups there is someone who seems mainly to be the only one who promotes and maintains good personal feelings among the group members. He will frequently do things to make the members feel comfortable and at ease with each other. Act supportive and mediate in situations, Any member in your group performed this function? How did you respond?

Susan Adam   CDI – Milwaukee 2006

Feedback

By Helene Oswald and Jacqueline Bahn

Definition and Purpose

In an interpersonal context, feedback is a communication to a person (or to a group) which gives that person (or group) information on how her/his (or its) behavior affects others. The purpose of feedback is to help individuals become more aware of the impact of what they do and say so that they can determine if their behavior is achieving their intent. We do not cause and are not responsible for others' reactions; they choose their responses based upon their perceptions and perhaps even their projections. If interpersonal effectiveness is our aim, we may very well wish to adjust our behavior in light of the feedback received.

Categories

Feedback may emerge in numerous ways:

Conscious: nodding assent
Unconscious: nodding asleep

Spontaneous: "Thanks a lot. "
Solicited: "Yes, it did help."

Verbal: "No."
Non-verbal: Leaving the room.

Formal: evaluation forms
Informal: hand-clapping

Criteria for Constructive Feedback

- **Descriptive -** It is descriptive rather than evaluative. With a precise description of what the other person did and said and how you felt in response, you are simply stating your perception and the other is free to use or not use the feedback.

Avoiding evaluative language reduces the potential for the individual to react defensively. Evaluative statements say something about you and your interpretation, perhaps they are projections. They say nothing about the other's behavior or intent.

- **Specific -** It is specific rather than general, referring to actual words and actions. It gives the person a clear picture of what you saw, heard, felt.

- **Usable -** It is directed toward behavior, something which the receiver can change.

- **Requested -** It is solicited rather than imposed. Feedback is most useful when the receiver has asked for it or agreed to a process of giving and receiving feedback.

- **Timely -** It is well-timed. In general, feedback is most useful at the earliest opportunity after the given behavior (depending, of course, on the person's readiness to hear it, support from others, etc.).

- **Clear -** It is checked to insure clear communication. One way of doing this is to have the receiver try to rephrase the feedback s/he has received to see if it corresponds to what the giver had in mind.

- **Accurate -** When feedback is given in a training setting, both giver and receiver have the opportunity to check with others in the group the accuracy of the feedback. Is this person's impression shared by others?

- **Appropriate -** Appropriate feedback gives consideration to timeliness and to the individual's capacity to hear it. If a person indicated s/he has heard enough to work on for the moment, offering additional feedback is inappropriate. It is also inappropriate to confront another under the guise of simple feedback.

Confrontation may include feedback, but it begins with a declaration of feelings, perception and the problem being experienced by the person confronting.

Appropriate Responses to Feedback

- Clarify the questions
- Paraphrase the feedback in your own words
- Invite other's perceptions
- Ask for suggestions
- Say "Thank-you"

Inappropriate Responses to Feedback

- Counter: "Yes, but..."
- Justify: "The reason I. .."
- Challenge: "You don’t understand that. .."
- Discount: "Well that's because you're a man" or "Oh it was nothing" (to positive feedback)

The T -Group setting provides an excellent opportunity for individuals to practice giving and receiving feedback. In this protected environment one is more inclined to risk asking for feedback.

Once one has experienced asking for feedback, has received both positive as well as negative comments, and survived the experience with a newly formed community, the probability of risking doing it in a back home setting is increased significantly.

If the experience is unpleasant in the T-Group, the participant can call upon the facilitator and group members to help him/her work though the process and explore ways to go about making it easier next time.

-- From MATC’s -- *Human Interaction Experiences: A Resource Book*, 1984

Feedback in Labs & Feedback in Task Groups

Feedback in a lab is primarily offered for the learning of a participant. It is providing that person with information about the impact of his/her behavior. The person may than make use of that information to make decisions about behavior.

For example:

John has asked for feedback.

John, when you do not respond to proposals I offer in the group. (That happened just after we returned from the break and again just a moment ago.) I feel discounted and frustrated because I don't see how the team can take a next step until we are all in agreement. I also feel invisible when there is no response. So it gets "personal."

The feedback is:
- Requested
- Timely
- Somewhat descriptive
- An "I" message

It is now up to John to consider what has been offered; e.g., How does that re4late to the impact I want to have in groups?; In this group?; How does it relate to my own learning goals?; etc.

As part of considering the feedback John may ask others to offer related feedback. That may help him get perspective.

Feedback in a task group may share all the same characteristics as in a lab but also includes at least several additional elements:
1. Feedback is not just about the person's learning process, it is also about the person's collaboration with the group in completing a task.
2. The group/organization has a right to expect members to adequately conform to the group/organizational culture (and related norms)
3. Others in the group, or organizational leaders, may decide to negotiate for particular behavior from the person to whom they are giving feedback.

[Note: At times all the above may also be appropriate in a lab setting.]

For example:

John's team leader has decided to offer John some feedback.

John, when you do not respond to proposals I offer in the group. (That happened just after we returned from the break and again just a moment ago.) I feel discounted and frustrated because I don't see how the team can take a next step until we are all in agreement. I also feel invisible when there is no response. So it gets "personal."

I would like you to offer me, and other team members, a specific response when proposals are offered. That would allow us to know if we can move to a next step. What do you think?

Resource -- See the feedback formula in the *Group Development Manual* page 34 and 35.

John might respond to the team leader in a variety of ways. For example.

- He may respond - *I'm perfectly willing to do that. I'm an introvert so I often get caught up in my own thoughts about the project and may fail to notice that a response is needed.*

- He may also respond – *I need help with this. I'm an introvert so I often get caught up in my own thoughts about the project and fail to notice that a response is needed. My best contribution may need a bit of time taking shape. Is there some way you can work with me on that?*

- He may decide that the expectation is too much a of a burden and that it is time to look for a new job (or he should get off of parish committee's etc.

Self-Disclosure

By Helen Oswald

Trust, within relationships and within groups, develops as the individuals share themselves with each other. In fact, without disclosing ourselves, we cannot form significant, personal relationships. There are basically two forms of **self-disclosure**, and in initiating and maintaining relationships, it is important to differentiate between the two and to know which is most appropriate for the given relationship or circumstance. The two forms are:

Openness Revealing how you perceive and react to the present situation; sharing what you are feeling or thinking or wanting at that moment; telling another person how his/her behavior is affecting you.

Personalness Revealing intimate, personal details of your private life.

Some people mistake being personal for being open. They try to get emotionally close to another by making highly personal confessions about their lives. Sharing information about one's past may lead to a temporary feeling of intimacy, but a relationship is built by disclosing your reactions to events you both experience or to what the other person says or does. A person comes to know you, not through your past history , but through encountering you in what you do and say in the present.

Openness requires a willingness to risk rejection. However, being open also carries the potential for being recognized as authentic, for gaining respect, and for establishing a norm of integrity in the relationship. Being open with warm positive feelings and reactions communicates caring and affirmation. The other person(s) doesn't have to wonder about being heard or feeling supported. Being open with negative feelings about responses precludes the storing of resentments and reduces the desire to complain, gossip, or act out the negativity in other ways destructive to relationships and to groups. Moreover, it provides the other(s) with the opportunity to know and respond to what is real for you at that moment.

Sharing intimate details of one's private or past life may be appropriate to help someone understand your current behavior, but it is not a solid foundation upon which to build relationships. The sharing of intimate details is most suitable to a counseling relationship in which one person is intending to gain perspective or insight by talking about his/her life experiences. Within relationships already solidly built through openness, a greater degree of personalness is appropriate.

Below are listed several statements. Identify those which are examples of <u>Openness</u> by placing an **"O"** in the block. Identify the examples of <u>Personalness</u> with a **"P".**

1. __ I appreciate your question because I thought I had given clean instructions.
2. __ Lydia, I feel discounted when you interrupt me to share your opinions before I've finished my point.
3. __ Even though I'm 45 years old, I can still be made to feel guilty by my mother .
4. __ I often have dreams in which I'm being ridiculed by others.
5. __ I'm feeling ignored because no one has responded to my suggestion.
6. __ I'm feeling anxious because the rest of you are all experienced professionals and I'm not.

Answers: 1-O,2-O,3-P,4-P, 5-O, 6- O

From MATC's -- *Human Interaction Experiences: A Resource Book*, 1984

CORE COMMUNICATION & FEEDBACK SKILLS

Communication Skills

Paraphrase - saying back to the speaker what you heard them say. The goal is to accurately grasp the content of their idea. You may either repeat exactly what was said or you may summarize, restate the essence of what the speaker said.

- A useful method is to begin your response with ***"I hear you saying ..."***

Itemized Response - this involves giving a full response to a person's idea by telling them what you like/appreciate/can use in their idea <u>and</u> what concerns you about the idea. The assumption here is that it helps the group's work when we enable participation and seek what may be of value in each idea. Itemized Response helps: keep unformed but possibly useful ideas alive, establish a supportive group climate, and helps us see the fullness of an idea.

- A useful method is to frame your responses using the following:
  "What I like about it is ...." ***"What concerns me is ..."***

Active Listening - trying to state the feelings and underlying message that the speaker is communicating. Stating this as something you are "testing" rather than as a "truth". Allowing yourself to be corrected as the person restates their message.

Making Statements Rather than Asking Questions or Sharing Opinions - this is to enable the group to stay with the issue being worked on. Frequently questions are really hidden statements, e.g., "don't you think it would be better if ...". Opinion sharing may better fit after work with beer or coffee.

The use of core communication skills:

- Tends to help focus the group's discussion. It reduces repetition and explaining "what I really meant to say ..."
- Important in de-escalating conflict; also in preventing misunderstandings. It provides everyone with a way to build agreements, clarify misunderstandings, negotiate.
- Helps the group build on each other's ideas. Builds trust and strengthens relationships.
- Requires "group discipline" - using the skill even when it feels awkward; giving energy to it; putting aside your own judgments for the moment; being congruent in the body language and tone of voice.
- You are working to respect others and yourself in a manner that is responsive and assertive rather than evasive, passive or aggressive. The skills assume that you are ready to give positive attention to the other person rather than only appearing to be engaged and listening.

FEEDBACK SKILLS

Feedback may have several purposes – it may be information that expands a person's information about themselves and the effect they have on others; it may expand the person's range of choices; and it may be intended to support or discourage certain behavior.

Feedback is likely to be more effective if:

- The person receiving it acknowledges the need for it; especially if the person requests it
- It is timely; given near the time the behavior has occurred
- It is skillful

Skillful Feedback

- Be descriptive, provide information that describes the behavior and its impact on you; restrict the feedback to what you know (e.g., behavior you have seen and how it has impacted you).
- It is about the giver of the feedback, not the person receiving the feedback. It is an exploration of the effect the person's behavior has had on you. (note – the same behavior may not have that effect on others).
- Avoid exaggeration ("you always get this wrong"), labeling ("you are stupid"), and judgement
- Speak for yourself ("what I feel/experience when you ….") not for others ("Everyone gets upset when you ….")
- Don't press the person for any immediate response
- Face to face – not by e-mail

Skillfully Receiving Feedback

- Listen – if something helps you to listen do that, e.g., take notes, ask someone else to make notes on the feedback so you can focus on the speaker
- Ask questions to clarify – "could you give an example of that?", "when did that happen?", "who else was there?
- If others where present during the behavior the feedback is about; ask them to offer feedback, what was the effect on them
- Acknowledge valid points
- Open yourself. Do not get defensive (you may feel it, don't act it). Stay focused on hearing what is being said.
- Take time to think about what has been said; if a response is necessary tell those offering the feedback that you will think about it and offer some response on a specific date.

A formula for giving feedback

1. "When you ……" Note the behavior; describe it as specifically as possible.

2. "I felt …." Tell how the behavior affects you. This is just one or two words – frustrated, angry, pleased, etc.
3. "Because I …" Share why you are affected that way.

From Feedback to Negotiation of the Relationship

4. "I would like …" What would you like the person to consider doing.
5. "Because …" Why you believe it will help
6. "What do you think?" Invite and hear the response; explore options

SHARED LEADERSHIP
The Maintaining of Task and Relationship Functions

Shared Leadership

A group functions more effectively when all its members accept responsibility for the work and life of the group. This shared sense of responsibility is also known as shared leadership. Much of the work done in recent years on establishing self-managing teams in the workplace is based on the assumption that employees and members are able and willing to accept more responsibility.

This doesn't in any way diminish the need for skilled, effective team leaders. People who have a designated role in decision-making and/or facilitation of team decision-making. While most work teams will continue to make use of designated leaders, team effectiveness can be significantly enhanced by shared leadership, the resources of all can be engaged. In this understanding it becomes part of the designed leader's role to equip others for shared leadership.

There is no reason why it must fall to the designated leader to be the proposer of goals, the clarifier of the task, the timekeeper, and the emotional encourager of the group. Any one who sees the need for these functions at a particular time may perform those functions.

One way of looking at shared leadership is in terms of the various functions that people play in an effective group and the tension among three aspects of the group's life.

Three Aspects of a Group's Life

All working groups are dealing with three elements that may work together in harmony or may come into tension:

- Task – the group needs to accomplish some task, it needs to engage in behaviors that help it accomplish that task
- Relationships – the group is a network of relationships; attending to relationship needs allows for both a more effective and more satisfying experience.
- Individual Needs and Wants – each member of the group brings with them there own needs for acceptance, influence, and intimacy.

All groups have these three elements. They each require attention if the group is to be productive in its work and satisfying to its members. There is a tension among them. A group that is excessively task-oriented may be get the job done but may build up resentments among its members because relationship and individual needs are not adequately addressed. A group that is overly relationship -oriented may enjoy being together, but let its task drift. The most effective groups are those that learn how to attend to all three aspects of the group's life.

Task Functions

Behaviors that help a group to accomplish its task. This might include checking out the team's acceptance of the task and objectives, helping to organize the work, or testing the group's readiness to move to a next step. Here is one way of looking at the functions.

Initiating -- Making suggestions, proposing group action, suggesting a decision making process, or a way to accomplish the work E.g. – "I'd like to get started, is that acceptable?"
Information seeking --Asking for facts, or clarification that is related to the group's task. E.g. - "What is the funding for the new project? Will it be adequate?"
Information giving -- Offering valid and useful information that is relevant to group decisions. E.g. - "Receipts have increased an average of 10% over the last three years. "
Opinion seeking -- Inviting others to share their beliefs or preferences and assessment of matters before the group. "Do you think we need to try a new approach to new member orientation this year?"
Opinion giving -- Expressing personal opinions or assessments of alternatives. E.g. - "I don't think the members are interested in half of the programs we are offering."
Clarifying -- Interpreting or explaining facts or opinions; identifying issues before the group, defining terms, paraphrasing other's statements, illustrating ideas or suggestions. E.g. - "You're saying we need to find a new way to discover what programs might best serve our members."
Elaborating – Expanding on ideas and suggestions that have been made. E.g. – "I'd like to see us have focus groups each year to explore member's interests."
Setting standards – Helping the group establish norms and standards related to getting the task accomplished. E.g. – "Can we agree to always assess proposals by asking for what we like about them, as well as what concerns us?"
Summarizing -- Pulling together related ideas, restating suggestions after the group has discussed them, reviewing major points in the discussion. E.g. - "So far we have come up with three different ways we could approach this. "
Consensus-testing – Asking if the group is ready to make a decision; offering a process by which the group might test agreement or investment in a proposal. E.g. – "Could we go around the group in a circle, having each of us share what we are ready to agree to."

Relationship Functions

There are a number of member functions that build and maintain the relationships of the group. Initiative can be taken to facilitate inclusion and acceptance, provide encouragement and support, and manage conflict.
Encouraging -- Being open and responsive to others; recognizing and supporting contributions; inviting comments. E.g. -- "I think that's a very useful idea. I can see how it will help us move beyond the disagreement."
Expressing group feelings -- Testing hunches about the mood of the group; doing so in an open, exploratory fashion; offering your own feelings as elated to the group climate or need. E.g. - "I'm not feeling much energy for this project. Where are the rest of you?"
Harmonizing – Negotiating or reliving tension when appropriate; suggesting ways of accommodating differing views; helping others explore their disagreements; seeking appropriate compromise solutions that "slit the difference" or make some type of trade-off. E.g. - "Both sides have a strong investment in their approaches. Let's see if we can work this out in a view that uses the best of each and respects all parties."
Gate-keeping -- Facilitating the participation of others, inviting less active members to contribute. "Several of us have expressed our opinions on this. I'm interested in what you think about it, Charlie?"
Setting standards – Helping the group establish norms and standards related to maintaining relationships. E.g. - "I think it would be helpful if we spent a view minutes at the end of each meeting commenting on our work together."

Individual Needs & Wants

The members of any group come with their own mix of needs and wants around being included, having influence, being close to others, etc. These needs and wants are essential to groups' healthy functioning. They provide some of the motivation, energy and glue for group life.

Most of the time people meet their own needs while also contributing to the groups work and the maintaining of relationships. At other time group members may engage in "self-oriented behavior" that is at the expense of the group and others. It may show up in behavior such as arriving late or leaving early from team meetings, ignoring team norms, having side conversations or withholding information that the team could use.

The group and designated leaders can help people use there needs and wants in a productive way by:

- Engaging in shared leadership; taking common responsibility for the task and relationships of the group
- Inviting members to share needs and wants.
- As possible working to address the needs and wants expressed by members
- Using tools such as MBTI and FIRO-B to explore and respect differences

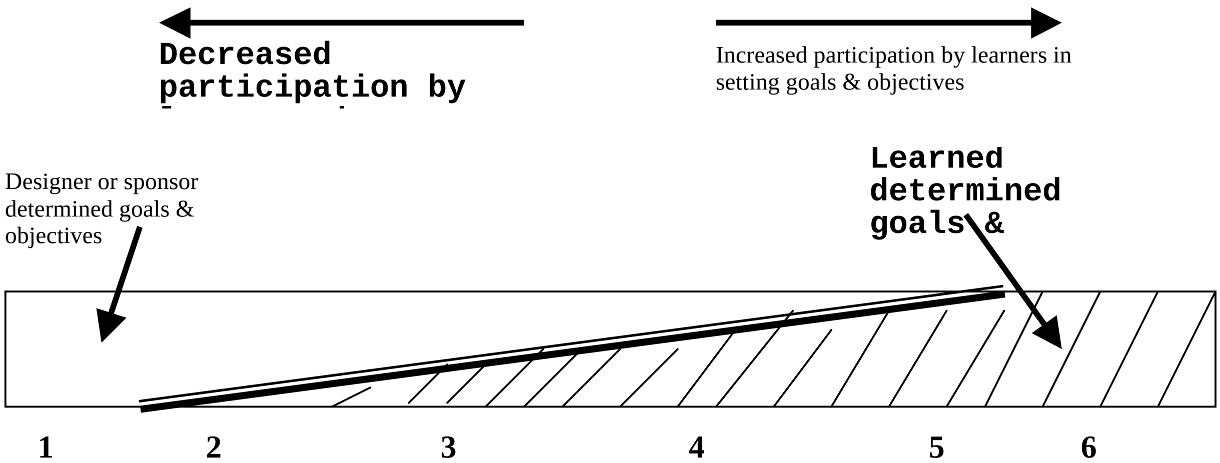
Examples of self-oriented behavior that is likely to interfere with the group's functioning:

- **Controlling or aggressive behavior -** Intimidating other group members, stating a position in a way that brooks no opposition.
- **Condescending** – Putting down the contributions of others
- **Blocking -** Arguing too much on a point; rejecting ideas without considering them; resisting stubbornly, reiterating a point after it has been discussed and rejected, changing the subject or continuing to raise objections when the group attempts to settle on a decision.
- **Dominating -** Asserting authority, status or superiority, excessive talking, interrupting or overriding others' comments.
- **Avoiding -** Ignoring relevant information, ideas and feelings.
- **Recognition seeking -** Horseplay, recounting unrelated personal experiences, pontificating.
- **Withdrawal -** Refusing to participate in group discussions, giving off non-verbal signals of disapproval or opposition; missing meetings; arriving late, leaving early
- **Pairing up –** Creating a caucus within the group of people who protect and support one another while ignoring the relationship functions
- **Dependency – Counterdependency –** A pattern of leaning on or resisting anyone in the group whom represents authority or expertise.

Robert A. Gallagher, 2001 This document is a revised version of earlier writings on group functions that has appeared in training manuals of MATC, LTI, NTL and other groups for many years

A CONTINUUM OF RELATIONSHIPS AMONG LEARNERS, DESIGNERS, and SPONSORS OF A LEARNING EVENT

Setting Goals and Objectives can be done at a number of points along a Continuum.



Position 1 Goals and Objectives are pre-determined by sponsor of learning event who employs designers to carry them out.
Learners do not *participate in determining Goals and Objectives.*

Position 2 General Goals are pre-determined by sponsoring agency. Objectives are determined by designers and presented to learners. *Learners do not participate in determining Goals and Objectives.*

Position 3 Designers determine general Goal areas and gather information from learners within that framework. Information gathered is used by designers to set specific Goals and Objectives. *No opportunity is given to the learners* to *modify them.*

Position 4 Designers determine general Goal areas and gather information from the learners within that framework. Information gathered is used by designers to suggest Goals and Objectives and *provide in the first part of the design* a *Plan by which learners may determine the suitability of the suggested Goals and Objectives.*

Position 5 Designers present general Goal areas <u>only</u> and *provide in the first part of the design* a *Plan that enables learners* to *develop their own Goals and Objectives.*

Position 6 *Learners determine Goals and Objectives* and employ designers to help them carry them out. Designers <u>do not</u> participate in determining Goals and Objectives.

ANY OF THESE POSITIONS MAY BE MOST APPROPRIATE FOR A GIVEN STRUCTURED EXPERIENTIAL LEARNING EVENT.

Participants in most experiential learning, would probably enter quite willingly into Plans based on Goals and Objectives pre-determined by the sponsors and designers of the learning opportunity.

Designers at Position 1 need to consider the effects of this in making Plans and conducting the event; or the designers might consider negotiating with the sponsor for learner input into the pre-determined Goals and Objectives. If designers were successful in negotiating with the sponsors, they might be able to move to Position 3 or Position 4 on the scale.

Positions 5 and 6 on the scale represent maximum determination by learners of their own Goals and Objectives. To the extent that the designers are committed to having learners shape the stated learning outcomes of the event, they will probably determine Goals and Objectives from Position 3 to Position 6.

Examples of Each Position on the Continuum:

Position 1 Goals and Objectives are pre-determined by sponsor of learning event who employs designers to carry them-out. *Learners* do *not participate in determining Goals and Objectives.*

Example: A school system hires designers to design a course in Team Building Skills to school principals and requires all principals to attend the course.

Position 2 General Goals are pre-determined by sponsoring agency. Objectives are determined by designers and presented to learners. *Learners* do *not participate in determining Goals* and *Objectives.*
Most learning opportunities offered by training agencies are examples of this position, Learners elect to take part based on an advertised description of the goals of a specific program.

Example: Staff designers at Experiential Education Design Skills conference present the agency-determined Goals and staff-determined Objectives for the conference to participants who voluntarily are attending the conference to learn how to design.

Position 3 Designers determine general Goal areas and gather information from learners within that framework. Information gathered is used by designers to set specific Goals and Objectives. No *opportunity is given* to *the learners* to *modify them.*

Example: A group of college faculty signs up for a "Communication. Skills Workshop" offered by two members of their Counseling Department. A questionnaire is sent to all participants. Based on the answers given, the two Counseling Department members set specific Goals and Objectives for the Workshop. They present these to the participants, along with the date from the questionnaire, at the opening session.

Position 4 Designers determine general Goal areas and gather information from the learners within that framework. Information gathered is used by designers to suggest Goals and Objectives and *provide in the first part of the design* a *Plan by which learners may determine the suitability of the suggested Goals and Objectives.*

Example: In the illustration given in Position 3, the two Counseling Department members, as part of the first session of the workshop, have the participants add to,subtract from and finally prioritize the Objectives offered.

Position 5 Designers present general Goal areas and *provide in the first part of the design* a *Plan that enables learners to develop their own Goals and Objectives.*

Example: A group of ten parks and recreation professionals come to the first of a series of eight two-hour workshops on "Communication Skills". In the opening session the designers ask, "What do you want to learn?" Based on that data, they lead the group in the process of stating Goals and Objectives for the following seven sessions.

Position 6 *Learners determine Goals and Objectives* and employ designers to help them carry them out. Designers do not participate in determining Goals and Objectives.

Example: A group of women who have volunteered to interview others in their professional organization ask designers to design two training sessions for them: (1) To learn how to ask open-ended interviewing questions (2) To identify a block to communication when it occurs in a one-to-one interview.

From *Designing Structured Experiential Learning* by Nancy Geyer, edited by John Denham, MATC, 1974

DESIGNER – FACILITATOR ROLES

In each role the person is using design skills & facilitation skills, knowledge and methods in an educational event, a program, a meeting, etc.

THE ROLE	*CHARACTERISTICS*	*BENEFITS*	*COSTS*
Manager The CEO, executive director, president, the manager of a department or the pastor of a religious congregation -- are all people with the primary responsibility for the event, meeting or program. <u>A Design Team</u> - an extension of the manager's authority; team shares responsibility for the work.	Has the legitimate authority for shaping processes, structures and climate of an organization or part of an organization; also for initiating and monitoring action and improvement in the system; the role is visible and accountable.	Easier to make entry into the system. More focused on results. Has a defined place in the organization.	May be drawn away from giving the needed energy and time to effective design and facilitation by other demands. Becoming the target of the system's cynics and those resisting improvement efforts.
Internal Designer - Facilitator Has a defined position within the organization that carries responsibility for educational, facilitation, consulting or training activities. Is not a manager with the authority to initiate efforts.	Visible. Is accountable to several sources (the internal client, the client's "boss"). Needs contracts with others in order to function.	Is part of the system. Can develop a highly integrated sense of how to do sign – facilitation work in this particular organization. May be more secure (financial and psychological) than an external designer – facilitator.	Less status than external consultants. Dependent on others for authority to function. Low influence. Political binds. May be under pressure to do projects or do them in a manner that violates own sense of good practice.
External Designer - Facilitator Is not part of the organization's on-going life. Is contracted with to provide educational, facilitation, consulting or training services.	High visibility. Temporary in the system. Has a formal contract. [“formal” doesn't necessarily mean written]	Independence in selecting work. Possible variety of clients. Clear contracts. May see things the insiders fail to see. May be able to productively use dependence.	Has to generate own clients. Lack of peers to work with in efforts -- lack of critique, loneliness. May be unfamiliar with the organization and the product or services it offers -- may lead to misunderstandings, lack of integration in approach. Not seeing the long-term results.
Participant - Internal Change Agent Any member or employee in the organization that uses their design – facilitation skills to improve an educational event, meeting, program, etc. Acts for improvement on their own authority. Has no organizational authorization for the effort. [May seek such authority – if received the role changes]	Role is not formally defined or authorized. May call for low visibility. May be risky.	Acting on own values. Sense of purpose.	Risk of punishment -being ostracized, loss of job or membership.

An Intervention Theory

The following is largely based on the work of Chris Argyris in *Intervention Theory and Method*. It can be seen as the underlying “process outcomes” the consultant is seeking in an intervention, i.e., valid and useful information, free choice, and internal commitment.

Valid and Useful Information

- Information that can be publicly verified; that can be tested with a broad range of people; that can be openly gathered and discussed.
- Is useful in the sense that something can be done with it to effect change

↓

Free Choice

- The task is for the client to select the option with the highest probability of succeeding (within cost limits).
- The process needs to enable that choice to be:
  - based on an exploration of options
  - voluntary, not from habit or coercion
  - proactive, not reactive

↓

Internal Commitment

- The target is for as many people as possible to have a high level of commitment to the option that was chosen.
- A high ownership and feeling of responsibility. That people are acting under the influence of internal decision rater than external forces.
- More likely to hold over time and under stress
- Open to re-examination (our commitment to “valid and useful information” may bring new information and new choices)

The theory assumes that one element builds on the other. The more the information is valid and useful, the more likely the free choice, the more there is truly free choice, the more likely there will be internal commitment.

The theory also assumes that the consultant is not just trying to help the client solve a particular problem or engage a specific opportunity; but is also concerned with two other matters:

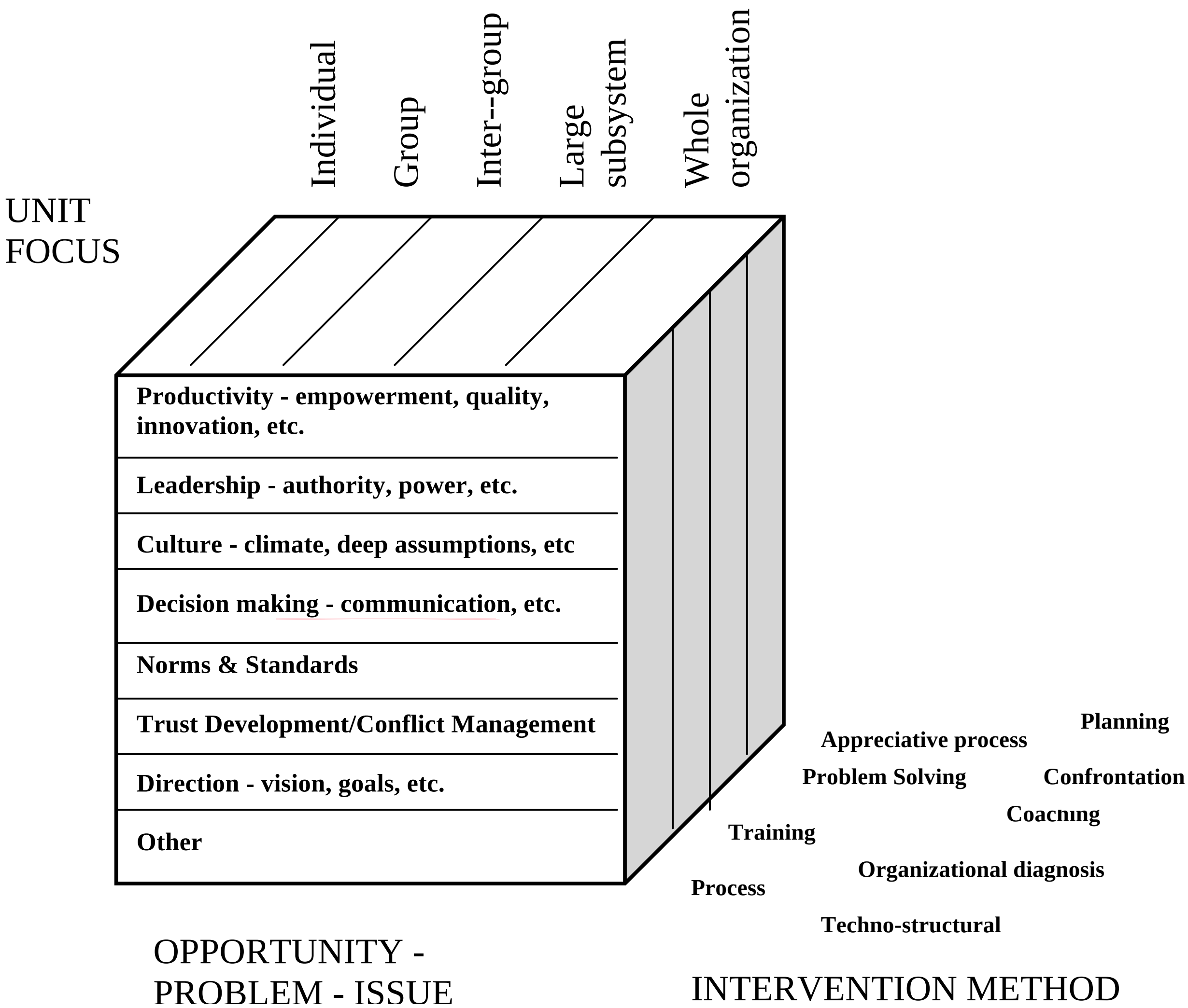
- that people end up with high internal commitment to the direction, and
- that the organizational culture is enabled to increasingly value and have the ability to generate valid and useful information, encourage free choice, and seek internal commitment.

There is a tension in an intervention between addressing the opportunity or problem at hand and pursuing the values in this intervention theory. Organizational leaders may decide to give more attention to one need over the other because of time limits, financial costs or due to holding different values.

Intervention Choices

OD practitioners are constantly making choices about interventions. Who to involve - just the leadership, a working group, everyone in the organization? What to focus on - the issue it would be easiest to make headway on or the most strategic opportunity? The style of work - do we take a problem solving approach or use some appreciative process? How deep shall we go - are we working on deep underlying assumptions about how we work and relate with one another or are we simply trying to get this problem behind us?

Various cube models have been used to understand the range of intervention options. Here's an example.



The use of a cube model is more to get perspective on your approach to interventions than it is as a planning tool. The model can help practitioners:

- Identify if they are using too narrow a range of interventions; suggesting they may need to expand their range. The concern here is that the practitioner may be relying on just a few familiar methods whether or not those methods fit the need.

- Clarify areas where they are especially gifted. It allows the practitioner to put a name to it, e.g., "I'm especially good at helping leaders develop strategies for marketing, culture change, etc."
- As a scanning tool when they are seeking a different approach in a particular case. It may stimulate thinking about options.

Other forms of the cube model

- Robert Blake and Jane Mouton developed the "Consulcube" which has three dimensions and 100 cells of possible interventions. They look at 1. What the consultant does (e.g., catalytic, confrontation, etc.); 2. The focal issues (e.g., power/authority, goals/objectives, etc.); and 3. The unit of change (e.g., individual, group, etc.)
- "The OD Cube: A Scheme for Classifying OD Interventions" is the creation of R. Schmuck and M. Mills. They especially used it in relation to work with schools.

Interventions

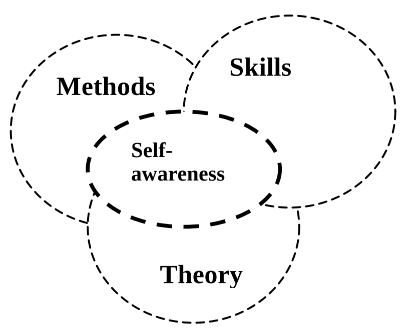
- All interventions will come within some form of the process of planned change (e.g., diagnosis, planning, implementation, and evaluation).
- There are a number of standard interventions in the field. Here are a few examples:

With Individuals	- T-group - Training & education to increase skills and knowledge related to the person's assigned task, relationships, decision-making, etc. - Coaching, counseling - Career/Life Planning
With Groups	- Team building - Process consultation - Self-managing teams - Role negotiation - Action planning - Skill training
Inter-group	- Mirroring - Process consultation - Conflict management
With the Total Organization	- Visioning; Strategic planning - Appreciative Inquiry - Quality of Work Life programs - Physical settings - Training - Parallel structures - Techo-structural - Employee/member involvement - Organizational learning

Practitioner Competency for Interventions

- The practitioner needs the capacity to identify when an intervention fits the situation and to implement it competently. It is also essential that the practitioner have the skills to modify standard interventions, and to create new interventions, appropriate to the need. Just using "off the shelf" interventions will prove to be inadequate. Training in design skills and intervention theory will provide two of the building blocks for developing interventions.
- The broader issue is that of the competencies needed to design and implement effective interventions. I'd suggest four areas of need:

1. Self-awareness	This includes an awareness of: the impact of their behavior on others, their communication styles, how they deal with differences and resistance, openness, authenticity, etc.
2. Theory	Practitioners need a theory base in group development, systems, interventions, etc.
3. Methods - Structured Activities	Small & large group processes; instrumentation; survey feedback, etc.
4. Skills	The ability to give & receive feedback; group facilitation skills; design skills, observing, listening, presentation skills, etc.



Making effective interventions is a complex process involving organizational purposes and needs, the organization's culture, and the competencies and values of leaders and consultants. The practitioner's awareness of the intervention possibilities is dependent on the depth and broadness of her or his competency.

Interventions -- Cummings and Worley's criteria

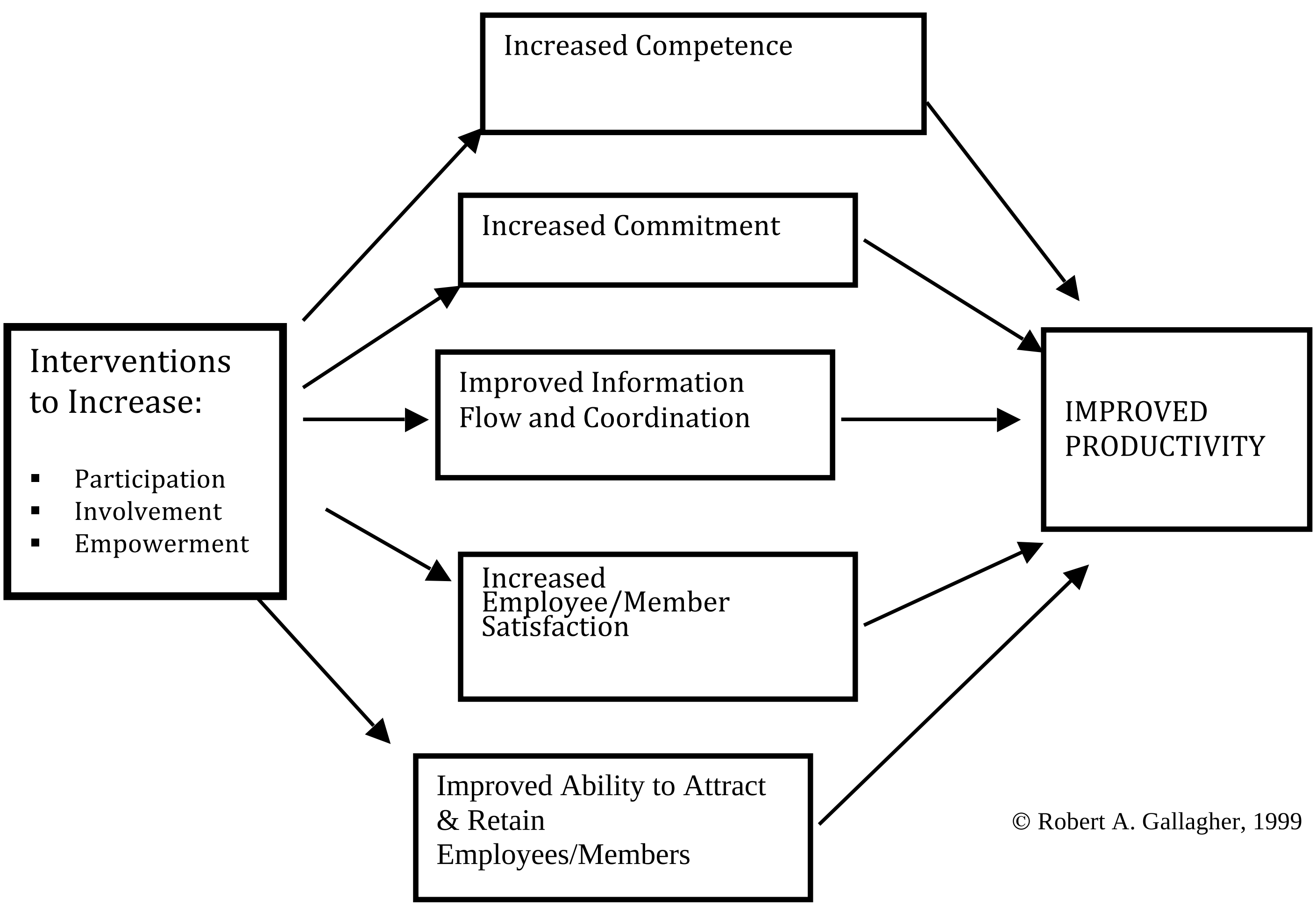
1. the intervention must be connected to client's needs (which means it must be derived from the diagnostic data that are collected and agreed to by the client. This also means that the consultant, according to Chris Argyris, provides the client with "valid information" for making decisions, that decisions about the data are made on the basis of "free and informed choice," and that the processing of the data creates "internal commitment" within the client.)

2. the intervention must be known to produce specific results (which means that when you or the client select an intervention there should be some empirical evidence to validate its effectiveness), and

3. the intervention must be transferred to the client so carry on the change process themselves (which connects to Anne and Ed's points in their posts)

If you or your client have an intervention in mind, it must satisfy all three criteria to be judged effective.

The Relationship Between Employee/Member Participation and Productivity



PARTICIPANT ROLE IN A TEAM

A. Help the team accomplish its task, by appropriately:

1. Checking out the team's acceptance of the task, objectives for this meeting, overall vision of the organization, etc.
2. Offering ideas
3. Clarifying the issue, stating options
4. Asking for/offer information useful at this point in the team's work
5. Testing the team's readiness to make a decision, move to a next step
6. Summarizing information
7. Testing assumptions
8. Using communication skills - paraphrase, itemized response, etc.
9. Assisting with time management
10. Generally helping to organize the work
11. Being self directed in your work

B. Help the team maintain working relationships, by appropriately:

1. Facilitating inclusion and acceptance
2. Offering positive feedback, support and encouragement
3. Helping to manage conflict
4. Facilitating communication

C. Help the team, by not:

1. Arriving late or leaving early
2. Ignoring or violating team norms/guidelines without acknowledging and asking the group if it is acceptable or whether it will be so distracting that you should leave the team
3. Having side conversations
4. Withholding information the team could use
5. Building up resentment toward others in the team or the whole team
6. Engaging in dominating, cynical or passive behavior
7. Attacking others, "put downs", "Yes, buts" toward other people's ideas

A MEETING CYCLE

DESIGN THE MEETING

1.Be clear who is design team
2. Objectives for the meeting
3. Design to facilitate participation
4. Go with energy/priority
5. Role Clarity - facilitator, will there be a focuser?
6. Space- will it work for this team?

CONDUCT THE MEETING

1. Use trained facilitator and team tools
2. Review objectives of meeting
   (incl. priorities, time agreements etc.)
3. “Warm up” activity
4. Priority Items
   (Something that requires team’s work/participation,
   use of improvement process; is a strategic issue)
5. Information Exchange (optional, very

6. Monitoring/Channeling “Testing” issues
7. Newsprint list of followup or next steps
8. Evaluate meeting (improvement

   meeting norms/ culture;
   do every few months, monitor, etc.)

DO IT !!

(Do the follow-up)

ADVANCE WORK

Collect information to design the next meeting (e.g. have people carried out assignments, etc.)

DESIGNING A MEETING

1. The Design Team

Who are the people with meeting design skills and the responsibility for the task? Who will facilitate the meeting? These people might make up a design team. Who else has something the contribute to the meeting design? Get their input over the phone before the design team meets.

2. Has the necessary advance work been done?

Have those responsible for work that must be done before the meeting been contacted? If the advance work is not completed, consider canceling the meeting or design the meeting around different areas.

3. Make sure that the "right people" will be at the meeting

Check to be certain that the people with the needed information and authority to act will be present.

4. Objectives for the meeting

Be clear about the desired outcomes of the meeting. Do not just create an agenda that is a "laundry list" of items. State items in measurable ways -- you need to be able to say if you accomplished it by the end of the meeting.

5. Design to facilitate participation

Use group decision making processes, clear roles, subgroups, warm ups, etc.

6. Decide on roles

Who will facilitate the meeting? Will there be a focuser? -- expert, person with the "final say", etc.

7. Logistical issues

See that the space is appropriate for the size of the team and the task. Arrange for meeting supplies - newsprint, tape, markers, etc. Will coffee or lunch be provided?

METHODS FOR INCREASING PARTICIPATION IN MEETINGS

1. Use group decision-making processes

- The process needs to be known by everyone, i.e., be part of the "common language" of the system
- You can teach or rehearse some processes just before using them, making it part of the "common language"
- Examples of common processes are: Brainstorming & Prioritizing, Force Field Analysis, SWOT, Likes/Concerns/Wishes, Testing, Channeling, Problem Solving Process, Mirroring

2. Use a trained facilitator who will use skills understood by all/most of the participants

3. Provide a common understanding of basic roles (i.e., participant, facilitator, focuser) and the skills that go with each.

4. Use subgroups -- breaking the larger group down into subgroups usually helps increase the participation of those who may be more introverted or hesitant about participating. Sub-grouping is also useful as a way of "jump starting" a team as it begins its work in a new area, on a topic that is difficult to talk about, or when people are tired.

5. Provide time for individuals to write down their ideas before starting work on an issue -- allows some people to think it through before having to say something to the whole team; a variation is to have people fill out a short survey and collate the information for the team to explore.

6. Avoid using team time for updates, reports, information sharing. These activities reduce participation and tend to reduce a team's energy level.

- If you need to do the above -- create a participatory process that allows people to respond or engage the report or information, e.g., Likes/Concerns/Wishes
- Cut down on the time given to information sharing and reports by using a very disciplined process with a time limit for each person and the whole activity; put it in writing, put them at the end of the meeting; separate these activities into a separate meeting that is short and only for reporting (try doing it as a "stand up meeting").

7. Use a norm checking process -- a process for developing, maintaining and changing team norms. Such a process allows the team to participate in deciding how it will do its work (it helps if the team has received some training in team processes).
  - reinforce norms that help participation, e.g., no attacks, use of IR (itemized response), if you generate the idea it doesn't mean you have to do it.

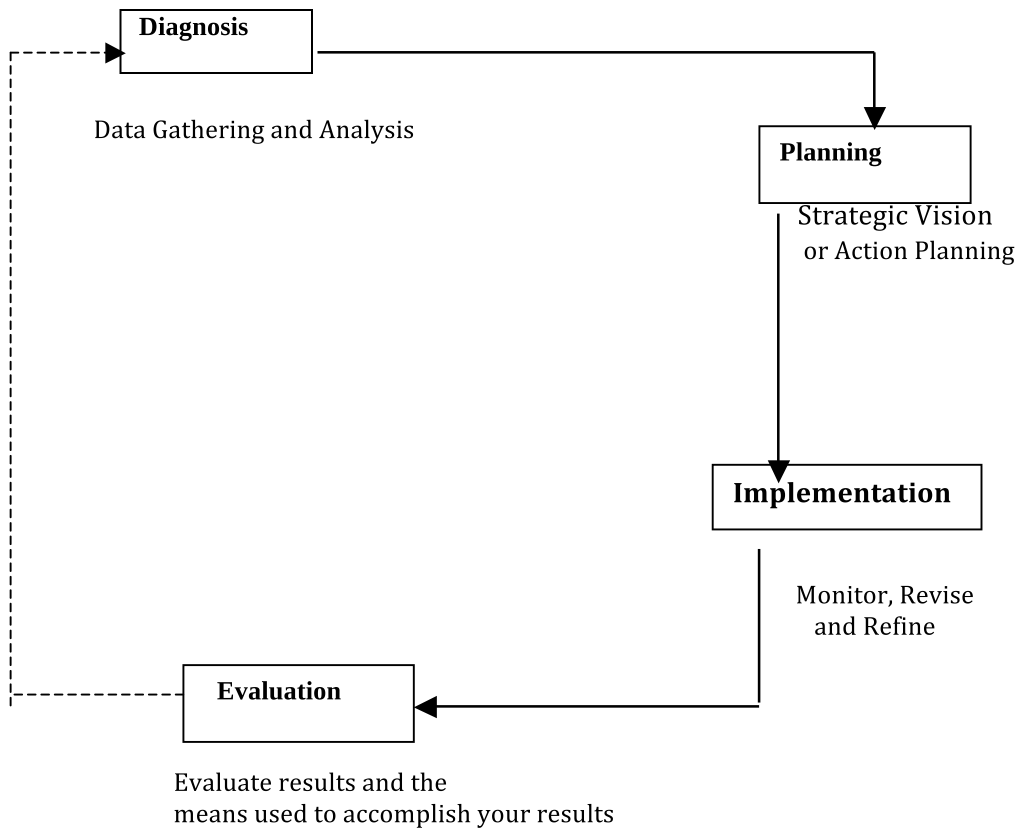
8. Use "warm up" exercises

9. Assign roles - time keeper, making the coffee, etc.

10. Provide positive feedback for participation.

A PROCESS OF PLANNED CHANGE

The core process of planned organizational change can be described as four steps: diagnosis, planning, implementation and evaluation. It is an organizational improvement process.



To move through the steps or phases of the process you need to be clear about the scale and type of change being proposed. This sets the context for the whole process. Is this a long range attempt to change the service or product, increase productivity or transform the organizational culture or is this a more limited venture such as training employees to gather information from customers on the quality of the product and service, team building with a staff or enabling members to create their own discipline for self care or spiritual development.

It may help to identify what kind of planning will be used. That will shape the diagnosis step. Is this process to create an action plan for staff development, is it a strategic vision to guide the total organization for the next three years or is it an operational plan for the coming year.

In preparing to move through the phases of the process it may be helpful to use a chart.

PHASE	HOW TO DO IT	WHO TO INVOLVE	SCHEDULE
Diagnosis · Data Gathering			
· Analysis			
Planning			
Implementation · Monitoring Team			
Evaluation			

Leaders have the primary responsibility for structuring, initiating and facilitating the process of planned change in the organization. Organizational leaders have the legitimate authority needed to launch a variety of planned change efforts.

The job of a consultant is to help the leadership facilitate the change process. The consultant may coach the manager, co-lead parts of the process or facilitate the whole process.

Internal change agents may be concerned with influencing specific parts of the process.

PROCESS OF PLANNED CHANGE WITH A CONSULTANT

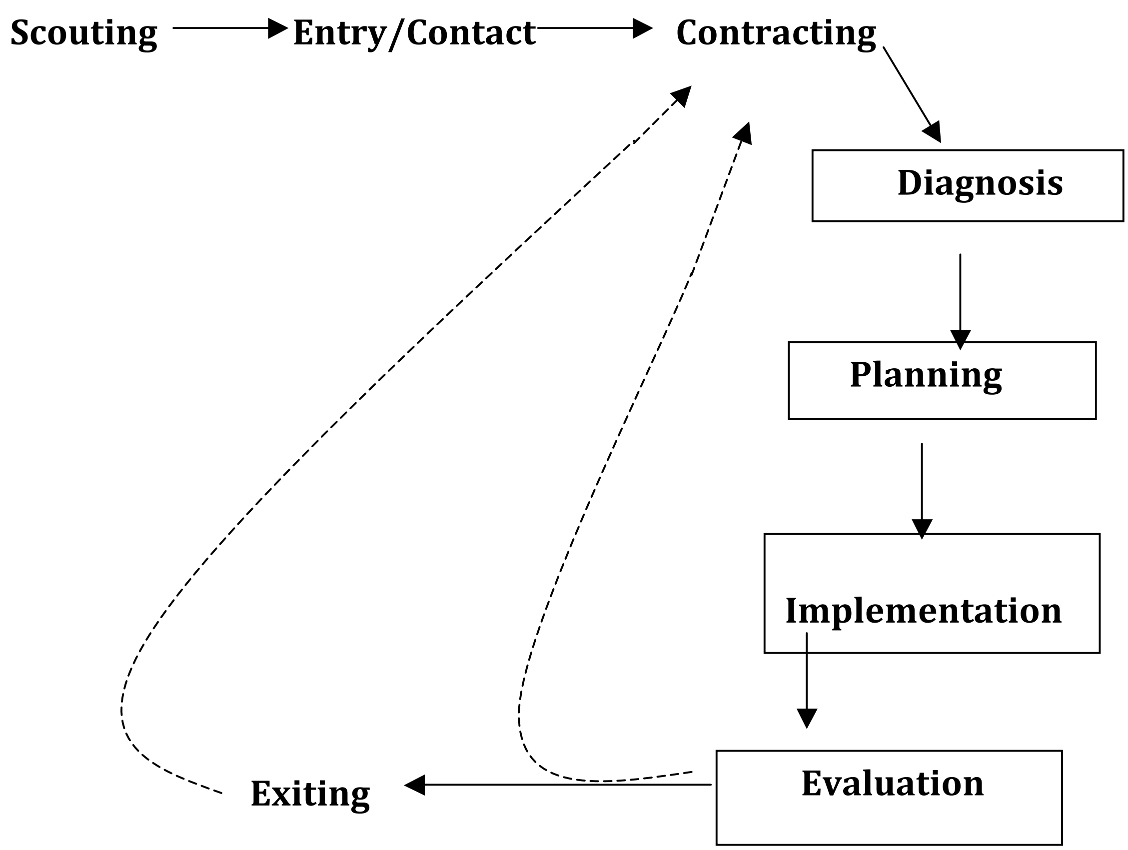
When a consultant is involved in helping the manager and organization in the change process there are additional steps to the process.

Before diagnosis:

1. <u>Scouting</u> - this involves the manager seeking a consultant or from the other end, the consultant seeking a client.
2. <u>Contact and Entry</u> - developing the relationship, making initial assessments, explore readiness for change.
3. <u>Contracting</u> - finding out what the client wants, what the consultant wants and making an agreement.

After evaluation: <u>exiting</u> - withdrawing from work with the manager and system. Re-contracting may take place after the evaluation if continued consultation is needed. Re-contracting may also take place after time has passed and the client requests new work.

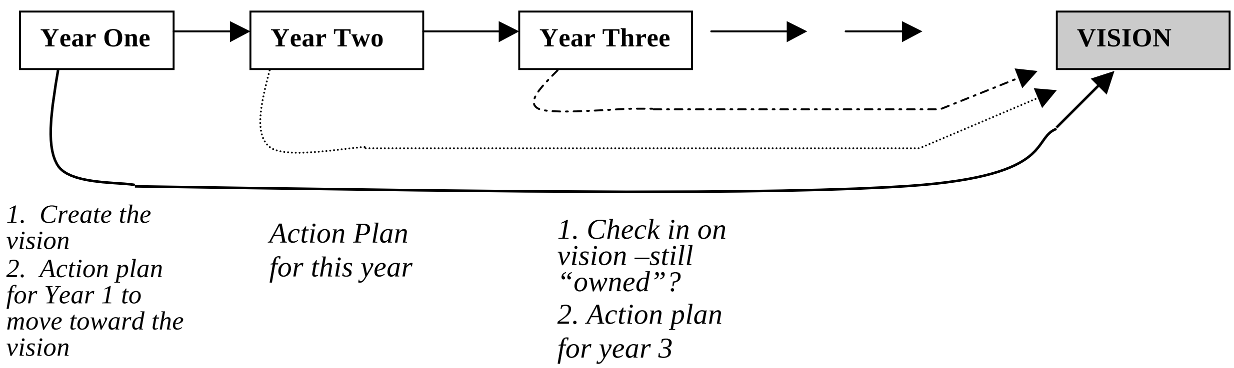
<u>The Process of Planned Change with a Consultant</u>



THREE PLANNING MODELS

1. An Unfolding Vision Process

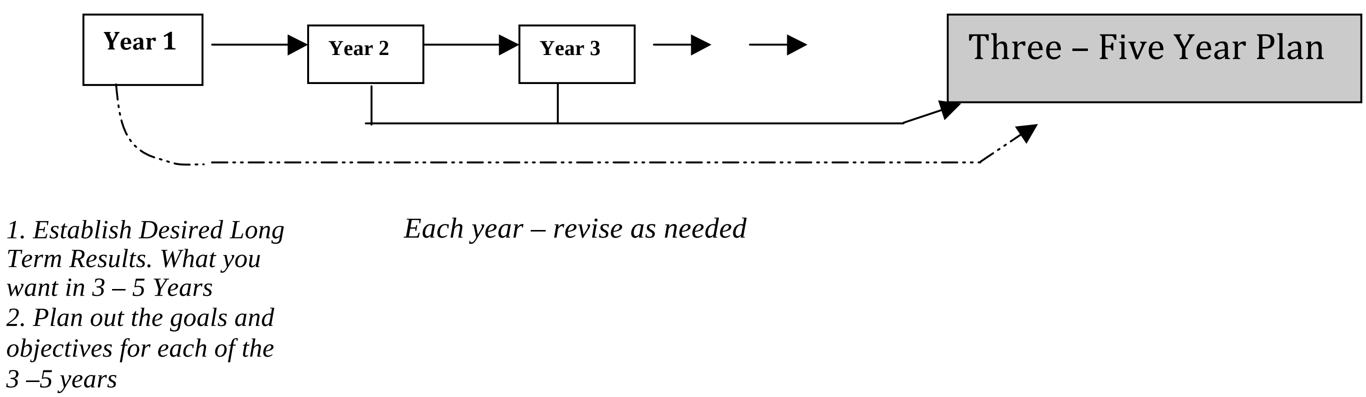
This involves creating a vision for how the organization might act and be in the future (3-5 years.) Notes may be made on people's ideas for what may need to happen in future years. That may influence both the vision statement and this year's plan. Then each year a plan is created to move toward the vision during the coming year. The organization also "check in" on the existing vision. Revisions are made if needed.



The unfolding vision process allows for flexibility while maintaining a sense of direction. It may make some people anxious not to have each year "pinned down." It does tend to keep the focus on where you want to go rather than on particular steps.

2. Linear Planning

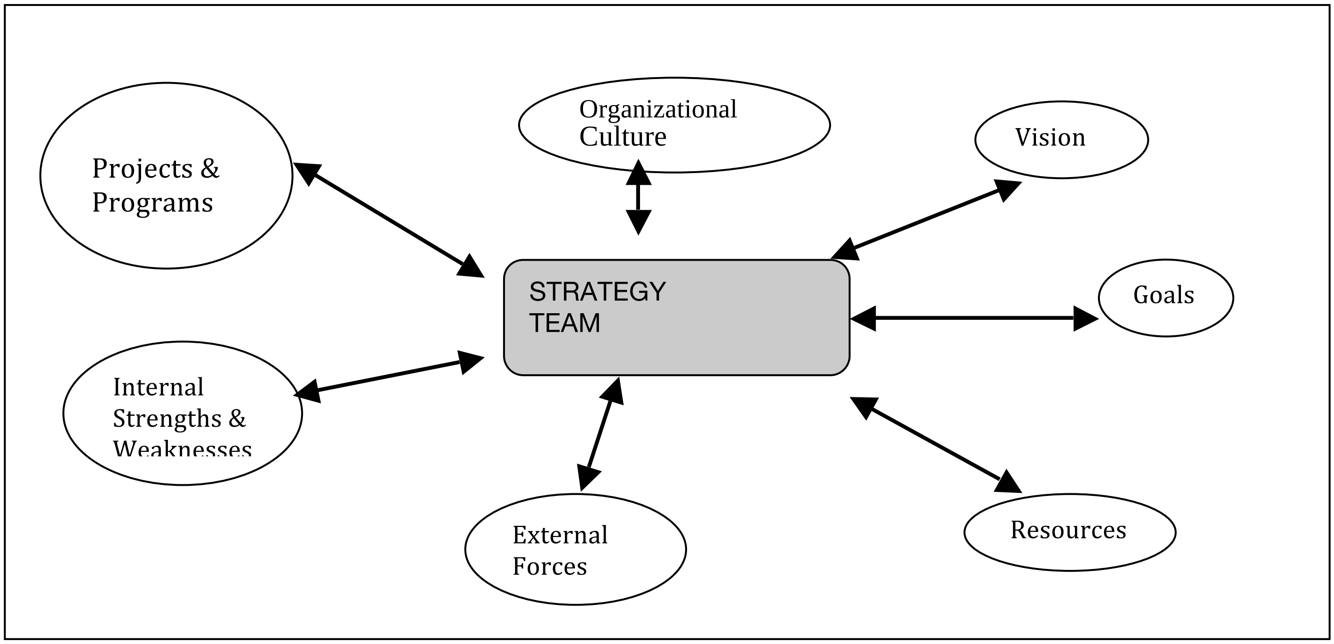
This involves both creating a statement of targets (i.e., results, outcomes, vision) that the organization wants to meet in three to five years and developing a plan for what will be done each year to move in that direction.



Linear planning provides a high degree of control and detail. If well done, it can provide for needed flexibility. However, it seems to have a tendency to give a "set in stone" tone to the process. Attempts to revise yearly plans are often seen as signs of failure. It is a comprehensive and systematic approach but tends to be slow and therefore frustrating. The detail of it, touching every aspect of organizational life, can set off strong and broad resistance.

3. Organic Planning

Some would say that this method isn't even planning. There may not ever be a written plan. The organization arranges itself to have a well trained, disciplined strategy team. The team has the job of paying attention to all significant elements of the system and to help bring each into a process of mutual adjustment with the others, while the organization. The effort is driven by an ongoing process of gathering and reflecting on information from each area.



Organic planning requires well trained, disciplined people who can quickly analyze information and take action. This may best be used in organizations working in a rapidly changing environment, facing immediate opportunities, or dealing with a crisis. This approach may encourage the continuing involvement of staff, board and clients/customers while allowing for timely action. Its comprehensiveness will depend on the shill and orientation of the strategy team.

ORGANIZATIONAL LEARNING & LEARNING ORGANIZATIONS

What is Organizational Learning?

Action
of an organization
to transform itself
through adaptive and innovative learning

The ability to gain insight and understanding
from experience and experimentation; observation, analysis and a willingness to examine both successes and failures

Involves for system activities (Huber, 1991)

1. Knowledge acquisition
2. Information distribution
3. Information interpretation
4. Organizational memory

Action may not be intentional or conscious

Goals of Learning

- Expand range of potential behavior
- Avoid making the same mistakes again
- Quicker response time
- More effective behavior
- Increased efficiency in gathering & interpreting information related to decision making
- To increase competitive advantage

What is a Learning Organization?

- An organization that has made learning intentional and systemic
- An organization in which you cannot not learn because learning is so insinuated into the fabric of life (Senge, 1990)

Some Characteristics

- Learns collaboratively, across boundaries
- Shows little fear, defensiveness, blaming; focused on improvement
- Invests in learning

Adaptive vs. Generative Learning

Adaptive or “single-loop” learning is about coping an incremental improvement. It is focused on problem solving in the present. Does not look at the process by which the organization learns

Generative or “double-loop” learning places the emphasis on learning about how the organization solves problems and does its work

Managers Role in a Learning Organization

Designer, teacher, coach, steward

Encouraging – openness, systemic thinking, creativity, empathy

Building an organization in which people are continually expanding their capacities to shape the future (Senge, 1990)

Relationship to Strategy

The key is not getting the right strategy but fostering strategic thinking (Mintzberg, 1987)

Learning organizations learn from their experiences rather than being bound by their experiences. (Malhotra, 1996)

SETTING OBJECTIVES

An objective is an outcome or result that the team strives to reach; it needs to directly supports the mission of the team and the organization's vision. This helps focus the team's energy and time use.

Team goals will have a higher possibility of success to the extent they are shared by all members of the team. If you help establish the objectives you are more likely to have a clear understanding of the objectives and be more committed to them.

Common objectives provide team members with:

- **Direction**
  The team is clear about what needs to be done. There is a focus for energy and time use.
- **Clarity**
  The team understands the results it is working toward.

An Objective is:

1. **Measurable**
   You can tell if you have accomplished it. An objective may be more qualitative or quantitative. It may be like a picture in the mind if the team – you know when you see it.
2. **Attainable**
   Objectives must not be too difficult or too easy. The team needs to be stretched and challenged without being frustrated. It disempowers people to be asked to attain objectives that are either too easy or too hard (that go beyond their resources or competence).
3. **In Alignment with the Vision and Goals**
   Objectives are congruent with the organization's stated vision the team's goals. They are directed toward fulfilling the vision and goals.
4. **Time Bound**
   Objectives are guided by specific time parameters and deadlines.

RECORDING ON NEWSPRINT: SOME HINTS

1. Title, number and date all sheets

2. Use dark colored markers - black, blue, purple - so it is easier for people to read. Other colors are useful for underlining, diagrams, etc.

3. If newsprint is being hung on a wall, always have a backing sheet under the one you are writing on to allow for the marker “bleeding”

4. Consider using dry erase markers - it allows you to move back and forth between newsprint and a white board, eliminates the possibility of using a permanent marker on a white board.

5. Decide on whether to use a white board or newsprint -- a white board is useful for teaching purposes when the participants are taking notes; newsprint is useful when you will be using the material again at another meeting and when the team will be producing enough work that it will need a lot of space.

6. Keep newsprint visible -- do not cover, “flip” it over, etc. This allows people to build on each other’s ideas and reduce repetition. Try to keep it hanging in the order it is produced.

7. Write large enough to be seen by people most distant from the newsprint.

8. Tell yourself that you are allowed to misspell words.

9. Storage -- roll up the newsprint, wrap an 81/2 x 11 sheet around the roll, tape it, write on the sheet the date, topic and group. Store in a wicker trash basket.

Learning Stances

We enter into the learning process with a stance (or some mix of stances) that comes out of our own history and experience. We may be a member of a parish church; and have an opportunity to learn in and from the community and the resources of the community. We may be the leaders of that parish church and have the opportunity to help that parish become a "learning organization"; open to new information from within and outside itself. We may be a participant in CDI and working with the opportunity to develop our competencies as a congregational development practitioner. It's a good bet that we enter into all these opportunities with the same stance or mix of stance.

Dependent -- "O how wise!"

In this stance someone else is responsible for our learning. The wisdom is outside of us. We hang on every word. It's as though we are empty and the leader is responsible for filling us up. We may have a hard time seeing our own learning goals or direction. We may be unable to name what we are feeling.

This stance is a way of setting ourselves up for the next stance -- counter-dependency.

Counter-Dependent -- "I don't have to if I don't want to!"

This is a stance in which the starting point is critical, e.g., "prove to me that you have anything to offer me". We may not be sure that we have the "wisdom"; but we are sure that others don't have it. It may also take the form of defensiveness about our competency. We feel the need to be "on" all the time. We have to be "the leader" even when there is a designated leader. We dominate our teams with our expertise and our caring.

Counter-dependency is often experienced in relationship with dependency. It can function as a dysfunctional cycle in which our attention is on the leader, the teacher, the experts, etc. rather than on our own learning needs. At one time we are in a dependent stance, then becoming disappointed in the leader, we shift into a counter-dependent stance.

Interdependent -- "How will I make use of this!"

This is a mission-focused stance. We are more focused on how we will accomplish the mission than we are on ourselves. We use our emotions and thinking to access what can be used. It's an open stance. We start with the assumption that there are things to be learned that are outside ourselves -- in the group, in another person's experience or training. It is an adult stance. We start with the assumption that we are responsible for our own learning. That we need to take initiative -- by working to apply insights, by doing our own thinking, by owning our "filters", by asking questions, and by testing out our hunches. We also have the capacity to enter into a productive form of dependency when another really does know more than us or when we need the emotional support that others are willing to offer.

In CDI - the mission is to develop as a congregational development practitioner (as a leader or consultant). To accomplish that mission the participant needs to have another setting in which they are able to be mission-focused around an organization or parish. The learning stance as a participant is to stay focused on the learning task.

In the parish or organization - the mission may be "restoring to unity" or making a profit; and the primary task the facilitation of the Renewal-Apostolate Cycle or the making of toothpaste. The learning stance as a leader or consultant is to make use of experiences, resources, others, self, etc. toward the fulfillment of the mission.

An Opportunity

An opportunity at CDI is to continue our exploration of the stances and filters we bring with us into most situations. Out of that exploration we may both gain more freedom in our choices about behavior and increased skills in managing our own learning process in a collaborative and interdependent manner. That in turn may equip us to help other do the same in the parish. Self-awareness is a critical starting place for the CD practitioner. We also need skills to help others develop their competencies rather than to become dependent on us.

Team Effectiveness

1. Direction &Goals

Poor 1 2 3 4 5 6 7 8 9 10 Good

Confused; conflicting; unrealistic; uninteresting to or no "ownership by" members

Clear and shared by all; important to all; "owned"

Comments:

2. Participation in Team Meetings

Poor 1 2 3 4 5 6 7 8 9 10 Good

A few dominate; some listen; several talk at once or interrupt

All participate; all are listened to

Comments:

3. Expression of Feelings

Poor 1 2 3 4 5 6 7 8 9 10 Good

Feelings are unexpressed, ignored or criticized

Freely expressed; empathetic responses

Comments:

4. Planning to Accomplish the Team's Work

Poor 1 2 3 4 5 6 7 8 9 10 Good

Done by one or two

Shared by all members

Comments:

5. Decisions

Poor 1 2 3 4 5 6 7 8 9 10 Good

Needed decisions don't get made; decisions made by one person or clique; others

Agreement sought and tested; differences used to improve decisions; decisions made are fully supported

Comments:

6. Shared Leadership for Team Work

Poor 1 2 3 4 5 6 7 8 9 10 Good

Team depends on one person or a clique; little shared sense of responsibility for team success

Team needs are met by various members; strong sense of shared responsibility

Comments:

Working Relationship: Exploration

1. Our sense of direction as a team is confused, unclear, etc.	1	2	3	4	5	6	Is clear, shared, etc.	Comments ______
2. Feelings are discounted or ignored	1	2	3	4	5	6	Feelings are respected and heard	Comments ______
3. We jump to solutions too quickly	1	2	3	4	5	6	We give time for adequate data gathering & diagnosis	Comments ______
4. One of us dominates the relationship	1	2	3	4	5	6	We all speak up, get our voice in	Comments ______
5. We take too much time making decisions, feels stuck too often	1	2	3	4	5	6	We are adequately efficient in our decision making together	Comments ______
6. We are tentative with each other, too polite and cautious	1	2	3	4	5	6	We trust each other; are rather direct	Comments ______
7. Our communications with each other are frequently unclear, confusing	1	2	3	4	5	6	Communications are clear	Comments ______

8. We don’t use each others resources	1 2 3 4 5 6	We make good use of one another	Comments
9. I feel very uninvolved & uncommitted to the relationship	1 2 3 4 5 6	I feel very involved & committed	Comments
10. We don’t give each other feedback about how we work together	1 2 3 4 5 6	We handle feedback well	Comments
11.	1 2 3 4 5 6		Comments
12.	1 2 3 4 5 6		Comments

Type -- Learning Styles

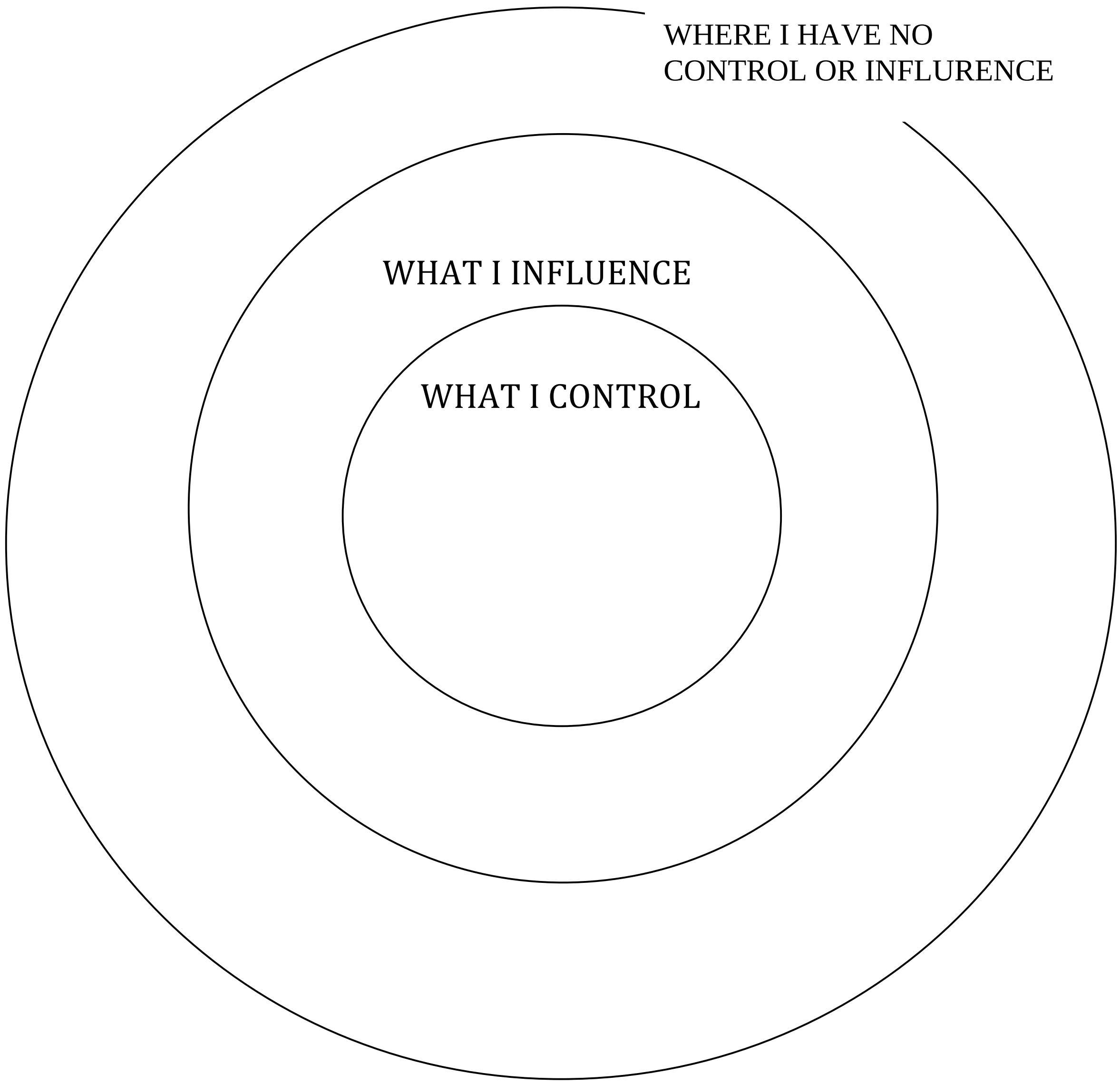
ST's are interested in: facts- useful, practical info about everyday activities Learns best by: doing, hands-on Needs: precise, step-by-step instructions; logical, practical reasons for doing something Wants from teachers: to be treated fairly

SF's are interested in: useful, practical info about people Learns best by: doing, hands on activities with others Needs: precise, step-by-step instructions; frequent, friendly interaction and approval Want from teacher: support, individual recognition

NF's interested in: new ideas about how to understand people, symbolic and metaphorical activities Learn best by: imaging creating with others, writing Needs: general direction, freedom, frequent positive feedback Want from teacher: warmth, enthusiasm, humor, individual recognition

NT's interested in: theories and global explanations Learn best by: categorizing, analyzing, applying logic Need: an intellectual challenge - and then to be allowed to work it out Want from teacher: to be treated with respect, to respect the teacher's competence

CIRCLES OF INFLUENCE WORKSHEET



1. In each circle identify specific areas, groups, circumstances.
2. Reflect on this in relationship to:
   - How you use the control & influence you have – how does your behavior match your core values?
   - What is the relationship between stress & frustration in your life and control & influence?
   - Where you have no/little control/influence your choice is in how you respond; you do control your response
3. Share what you want to share in the group

Organization Development Competencies

as of March, 2001

Prepared for the OD Network by Roland Sullivan, Bill Rothwell, and Chris Worley

MARKETING

An effective organization development (OD) practitioner can . . .

1. Be aware of systems wanting to change
2. Be known to those needing you
3. Match skills with potential client profile
4. Convey qualifications in a credible manner
5. Quickly grasp the nature of the system
6. Determine appropriate decision makers
7. Determine appropriate processes

ENROLLING

An effective organization development (OD) practitioner can . . .

8. Build trusting relationships
9. Present the theoretical foundations of change
10. Deal effectively with resistance
11. Help the client trust the process
12. Help the client manage emotionally charged feelings
13. Collaboratively design the change process

CONTRACTING

An effective organization development (OD) practitioner can . . .

14. Contract psychologically for collaboration
15. Help the client reflect on motivation
16. Clarify outcomes
17. Build realistic expectations
18. Conduct a mini-assessment
19. Identify the boundary of systems to be changed
20. Articulate an initial change process to use
21. Explicate ethical boundaries
22. Confirm commitment of resources
23. Identify critical success factors for the intervention
24. Clarify the role of consultant
25. Clarify the role of client
26. Begin to lay out an evaluation model

MINI-ASSESSMENT

An effective organization development (OD) practitioner can . . .

27. Further clarify real issues

28. Be aware of how one's biases influence interaction
29. Link change effort into ongoing organizational processes
30. Identify formal power
31. Identify informal power

DATA GATHERING

An effective organization development (OD) practitioner can . . .

32. Determine an appropriate data collection process
33. Determine the type of data needed
34. Determine the amount of data needed
35. Utilize appropriate mix of methods to ensure efficiency
36. Utilize appropriate mix of methods to ensure objectivity
37. Utilize appropriate mix of methods to ensure validity
38. Utilize appropriate mix of data collection technology
39. Clarify boundaries for confidentiality
40. Select a process that will facilitate openness
41. Gather data to identify future states

DIAGNOSIS

An effective organization development (OD) practitioner can . . .

42. Gather data to identify initial first steps of transition
43. Watch for deeper issues as data is gathered
44. Suspend judgment while gather data
45. Know when enough data has been gathered
46. Suppress judgment while gathering data
47. Use statistical methods when appropriate
48. Recognize what is relevant
49. Know how data from different parts of the system impact each other
50. Communicate implications of systems theory
51. Continuously assess the issues as they surface
52. Stay focused on the purpose of the consultancy
53. Utilize a solid conceptual framework based on research

FEEDBACK

An effective organization development (OD) practitioner can . . .

54. Prepare leadership for the truth
55. Involve participants so they begin to own the process
56. Synthesize the data gathered into themes
57. Create a non-threatening atmosphere
58. Facilitate complex emotional patterns

PLANNING

An effective organization development (OD) practitioner can . . .

59. Distill recommendations from the data
60. Focus action that generates high impact at lowest cost
61. Consider creative alternatives
62. Mentally rehearse adverse consequences
63. Mentally rehearse potential gains

PARTICIPATION

An effective organization development (OD) practitioner can . . .

64. Facilitate a participative decision-making process
65. Obtain direction from leadership
66. Obtain commitment from leadership
67. Co-create an implementation plan that is rooted in the data
68. Co-create an implementation plan that is concrete
69. Co-create implementation plan that is simple
70. Co-create implementation plan that is clear
71. Co-create implementation plan that logically sequences activities
72. Co-create implementation plan that is results-oriented
73. Co-create implementation plan that is measurable
74. Co-create implementation plan that is rewarded

INTERVENTION

An effective organization development (OD) practitioner can . . .

75. Reduce dependency upon consultant
76. Instill responsibility for follow through
77. Intervene at the right depth
78. Pay attention to the timing of activities
79. Facilitate concurrent interventions
80. Help manage impact to related systems
81. Re-design intervention or mindfully respond to new dynamics

EVALUATION

An effective organization development (OD) practitioner can . . .

82. Integrate research with theory and practice
83. Initiate ongoing feedback in client-consultant relationship
84. Choose appropriate evaluation methods - - that is, interviews, instruments, financial sheets - - to collect evaluation information
85. Determine level of evaluation - - such as reaction, learning, behavioral change, organizational impact, societal impact
86. Ensure evaluation method is valid
87. Ensure evaluation is reliable

88. Ensure evaluation method is practical

FOLLOW-UP:

An effective organization development (OD) practitioner can . . .

89. Establish method to monitor change during the intervention
90. Establish method to monitor change after the intervention
91. Use information to reinforce positive change
92. Use information to correct negative change
93. Use information to take next steps
94. Link evaluation with expected outcomes

ADOPTION

An effective organization development (OD) practitioner can . . .

95. Transfer change skills to internal consultant so learning is continuous
96. Maintain/increase change momentum
97. Link change process to daily life of system
98. Mobilize additional internal resources to support continued change
99. Determine the parts of the organization that warrant a special focus of attention
100. Pay attention to movement back to old behaviors
101. Move more away from project-driven change to strategy-driven change
102. Be sure customers and stakeholders are satisfied with intervention's results
103. Plan renewal/reunion events

SEPARATION

An effective organization development (OD) practitioner can . . .

104. Recognize when separation is desirable
105. Process any left over relationship issues between consultant(s) and client
106. Ensure that learning will continue
107. Leave the client satisfied
108. Plan for post-consultation contact

SELF-AWARENESS

An effective organization development (OD) practitioner can . . .

109. Clarify personal values
110. Clarify personal boundaries
111. Manage personal biases
112. Manage personal defensiveness
113. Recognize when personal feelings have been aroused
114. Remain physically healthy while under stress
115. Resolve ethical issues with integrity
116. Avoid getting personal needs met at the expense of the client (i.e., financial, emotional, sexual, etc.)
117. Work within the limits of your capabilities
118. Perform effectively in an atmosphere of ambiguity

119. Perform effectively in the midst of chaos

INTERPERSONAL

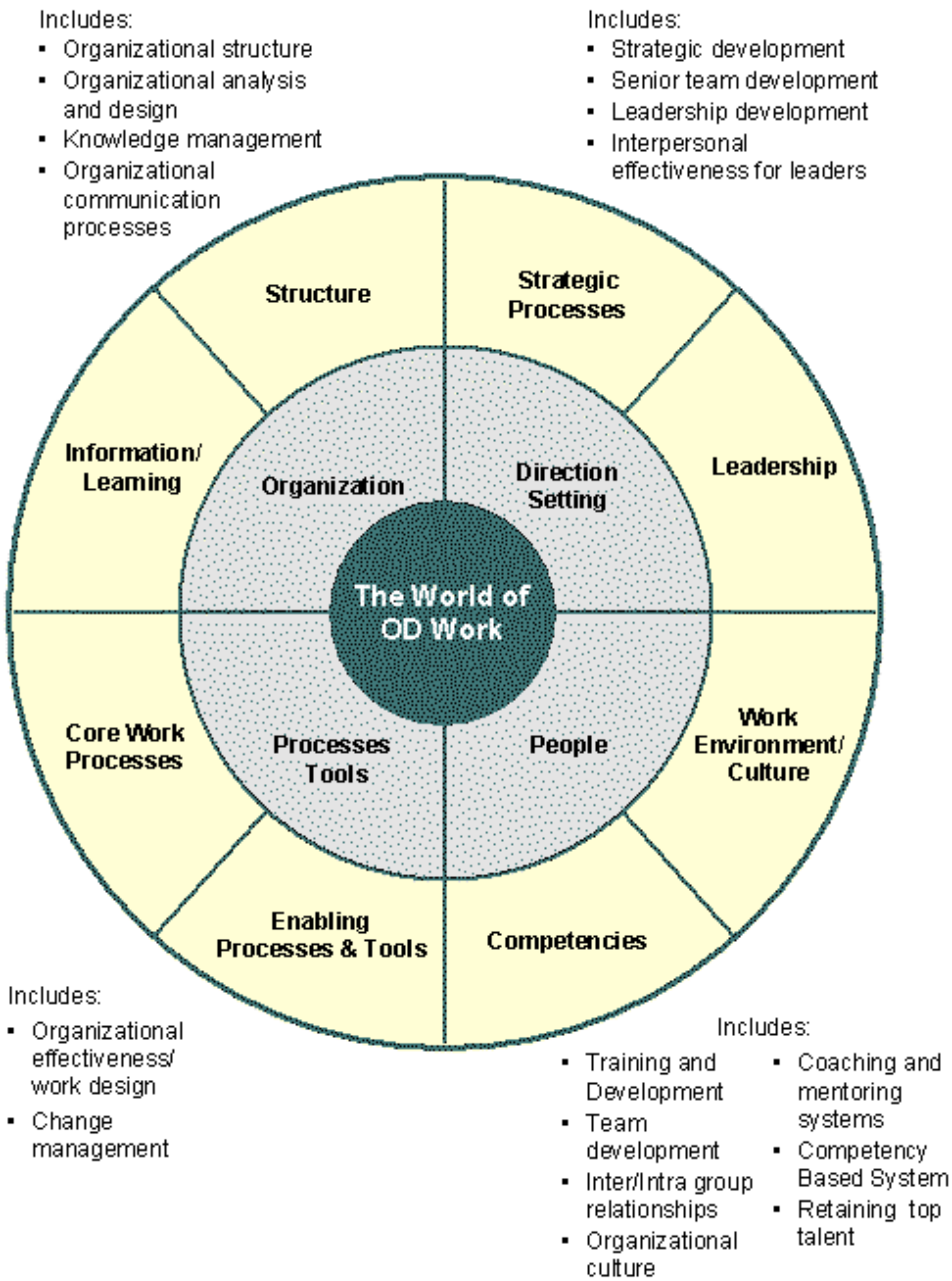
An effective organization development (OD) practitioner can . . .

120. Develop mutually trusting relationships with others
121. Solicit feedback from others about your impact on them
122. Energize others
123. Collaborate with internal/external OD professional
124. Balance the needs of multiple relationships
125. Listens to others
126. Pay attention to the spontaneous and informal
127. Consistently maintain confidentiality
128. Interpersonally relate to others
129. Use humor effectively

OTHER

An effective organization development (OD) practitioner can . . .

130. Interpret cross-cultural influences in a helpful manner
131. Handle diversity and diverse situations skillfully
132. Communicate directions clearly to large groups
133. Use the latest technology effectively
134. Use the internet effectively
135. Facilitate small group interventions (up to 70)
136. Facilitate large group interventions (70-2,000)
137. Apply the skills of international OD effectively
138. Function effectively as an internal consultant
139. Demonstrate ability to conduct transorganizational development
140. Demonstrate ability to conduct community development
141. Be aware of the influences of cultural dynamics on interactions with others


Includes:
Organizational structure
Organizational analysis and design
Knowledge management
Organizational communication processes
Includes:
Strategic development
Senior team development
Leadership development
Interpersonal effectiveness for leaders
Structure
Strategic Processes
Information/ Learning
Organization
Direction Setting
Leadership
The World of OD Work
Core Work Processes
Processes Tools
People
Work Environment/ Culture
Enabling Processes & Tools
Competencies
Includes:
Organizational effectiveness/ work design
Change management
Includes:
Training and Development
Team development
Inter/Intra group relationships
Organizational culture
Coaching and mentoring systems
Competency Based System
Retaining top talent

About LTI – Leadership Training Institute

Description of LTI Workshops

Human Interaction - An opportunity to learn about yourself, how your behavior impacts others, and how to function more effectively in a group and interpersonal situations. The competencies developed are those associated with what has been called emotional intelligence. A key element of the program is the use of the T-Group method which facilitates learning by bringing together a small group of people for the express purpose of studying their own behavior when they interact within a small group. The T-group method provides little structure or direction from the trainers. The lack of a given structure allows participants to learn about their own patterns of behavior when there is a need for them to accept responsibility for a group's life and work. The training staff works to help participants learn from their own experience. The Human Interaction Workshop is the required prerequisite training for most other LTI events. This is a beginning point for learning core skills that are used and build on in other events.

Group Development - This workshop focuses on understanding and effectively sharing leadership in groups and teams. Attention is given to developing an awareness of group development and dynamics, balancing task and relationship issues, establishing group norms. Group facilitation skills training is part of the event. Prerequisite Training Required: Human Interaction with LTI or another approved group

Design Skills - Develop skills that can improve the quality of meetings, education, and programs; that increase "ownership", energy and excitement. Increase your ability to design more experiential and participatory events. Prerequisite Training Required: Human Interaction with LTI or another approved group.

Consultation Skills - For those in consulting or other third party roles This event focuses on skills for third party intervention, e.g., steps in the consulting process; consulting style, ethics, needs, dilemmas, dynamics; the ability to form authentic helping relationships; becoming more comfortable with the use of "self" in consulting. Prerequisite - Participants must have completed Human Interaction and either Group Development or Design Skills with LTI or another agency; or have completed a human interaction workshop and CDI - Church Development Institute

Conflict Management - This workshop will offer special attention to the "use of self" in a conflict. The goal is to increase your awareness of what is happening to you in a conflict, help you to identify your blindspots, and to increase the range of options you have for effective behavior. We will begin with a couple of days of T-group work. There will also be opportunities for self-assessment and feedback from other participants and trainers. In addition to the emphases on the "use of self" you will learn conflict management skills, methods and theory for use in groups and organizations. This workshop meets the perquisite requirements for other workshops. It is somewhat longer than other workshops.

Church Development – If you are interested in training that focuses on the use of organization development methods and knowledge in church organizations you may want to look at the Church Development Institute. For information go to www.CDITrainers.org

Arrange for workshops in your region

LTI will come to your region and offer a series of workshops in collaboration with a diocese, group of parishes, or other organization.

Your organization will be asked to recruit enough participants to make it possible to conduct the workshops. LTI will also invite people from other regions to participate. You will be asked to do the initial logistical work of arranging for a training location and providing a contact person to work in partnership with the LTI workshop coordinator. You may also be asked to provide an underwriting grant to LTI. The size of the grant depends on your success in the recruiting effort. It usually runs in the range of $1,500 - 4,000

LTI will provide the training staff, materials and manage all the follow up work with the training location.

The interactive of the training experience makes it essential that participants arrive as scheduled, and participate in all scheduled sessions throughout the week; no late arrivals or early departures.

LTI is a Network of Trainers

We are a network of experience lab trainers who have served the church and other organizations. Senior LTI trainers are: Susan Adam, Bob Gallagher, Rebecca DeBow, Bill Thomas, Kay Collier-McLaughlin, and Bill Yon. Co-trainers are Liz Tunney and Paul Rider

Interns: Glenda Curry, Susan Latimer, Stephanie Gadzik, Susan Burns, Peggy Worzalla, Michelle Heyne, Lou Blanchard, Krista Points, Ann Fleming, Patty Downing, Jan Merkt, Anita Sanborn, Steve Carlson, Dickie Downing.

We are committed to providing the best possible training for the church and other organizations. We are also engaged in a process of establishing a larger training network that will be able to offer more training at locations in various parts of the country.

A division of CDI Trainers
LTI is part of CDI Trainers.

Episcopal Church Related – LTI has been supported by a number of dioceses and church related organizations. Most staff are lay or ordained Episcopalians.

The Leadership Training Institute offers programs that enable leaders to function more effectively in their work with parishes and other organizations; to improve their competence for working with others, facilitating teams, and designing meetings, educational events and programs. We have a special vocation to serve the Episcopal Church while also serving non-profit organizations and values based businesses.

All of LTI's programs use the laboratory method of learning. This form of training has a goal of increasing your options for effective behavior in interpersonal, group, and organizational settings. Lab Learning involves disciplined reflection on the immediate here-and-now experiences within the learning community. We make use of applied behavioral science theory to explore the patterns and dynamics present in a group or organization. This has proven itself as one of the most effective ways to learn skills involving work with people an change processes. In addition to learning in the focus of a particular lab (e.g., group development, consultation skills, etc.) all events offer the opportunity to:

- Increase your understanding of the impact of your behavior on others.
- Increase your ability to give and receive feedback.
- Increase your understanding of group development and dynamics.
- Better understand the underlying social processes at work within a group
- Experiment with changes in your behavior
- Better integrate your feelings, thinking and values
- Increase your ability to learn from your own and a group's experience.

Participants will be involved at every stage in activities which will are designed to increase self awareness, expand your awareness of choices you have in the immediate situation, and at times challenge your filters and biases.. These activities involve a certain amount of stress**. It is not, therefore, advisable for persons to participate who are living in the midst of unusual stress in their personal or professional lives.**

The interactive character of the training experience makes it essential that participants arrive by Sunday evening, and participate in all scheduled sessions throughout the week. In is generally advisable that you be in residence during the program.

Worship - All LTI workshops provide the opportunity to participate in worship in the Episcopal Church's tradition. All are welcome, no participant is expected to participate as part of the program. Worship usually includes daily Morning Prayer, Evening Prayer or Compline. We often celebrate the Holy Eucharist toward the end of the workshop.

Values & Faith Reflection Opportunities - Workshops often provide some opportunity to reflect on the relationship between what you are learning and your theological, philosophical or value tradition. The setting may allow practice in communication among people of different faiths and backgrounds as well as people who have no religious affiliation or interest. LTI staff will support an atmosphere of ecumenical openness, tolerance and respect for difference

Why Leadership Training?
Insights and skills developed in the workshops are used by people in the normal activities of parish and diocesan life:

- working with Vestries and other groups
- planning and goal-setting
- integration of new members
- education for children, youth, and adults
- community-building in the parish

In addition, lab training has been the foundation upon which a variety of special skills have developed on which the church has come increasingly to rely. Those involved in Church leadership during this period will be familiar with many of these areas:

- consultation for congregational development and during a parish search
- facilitation of Vestry retreats
- stewardship education and training
- conflict management
- mutual ministry review
- organization development

Each of these special applications depends upon basic understandings and skills in human relations and in the dynamics of communication between persons and within groups and parishes. Participation in LTI workshops can provide a valuable foundation for those who are called on for such special responsibilities.

Why a Mixed Participant Population?
There are several reasons why the training is open and not just for members of the Episcopal Church.
1. It offers the opportunity for everyone to use skills in interpersonal and team work in a more realistic context. This skills are not just used in church settings. This is especially important for participants who are lay members of parishes.
2. It is a way of serving the broader society.
3. It makes it easier for Episcopal laity to have their secular employers cover the costs of their participation
4. It allows us to draw on a larger population base and which makes it easier to cover costs.

Commitment - Competency - Emotional Maturity