

APPLICATION ACTIVITY: THE HILLSIDE CHALLENGE

3-X



Job Performance
Situation 3:
Building Essential
Skills
in Facilitation,
Decision-Making, and
Communication

HEAD START
MOVING AHEAD
COMPETENCY-BASED TRAINING PROGRAM



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REFERENCE

This activity develops skill competencies in *facilitation*, *decision-making*, and *communication*. Participants will be able to use the skills they learned in addressing the Hillside Challenge. They will encounter opportunities to hone these competencies and apply them to a Head Start job performance situation. Then they will consider how the lessons learned can be applied generically to other Head Start work situations.

Related skill activities include 3-C, Facilitation: Fundamentals of Leading Meetings; 3-D, Decision-Making: Building Consensus; 3-E, Communication: Effective Spoken Communication; 3-F, Communication: Active Listening Skills, and 3-G, Communication: Effective Written Communication.

Application Activity: The Hillside Challenge

Outcomes. Participants will practice some or all of the following skills:

- describe the elements of facilitation
- understand the strategies and skills required to achieve successful meetings
- apply facilitation skills to a Head Start situation
- determine when the content of a message is clear
- identify clashes between verbal and nonverbal messages
- recognize when communication is being blocked
- demonstrate how communication can be kept open and moving forward
- identify opportunities for demonstrating respect and building rapport
- recognize when cultural differences and personal factors will affect communication
- determine their capacity as active listeners
- demonstrate active listening skills
- employ effective techniques for paraphrasing to clarify meaning
- understand the barriers for active listening
- use a simple framework for conducting a consensus-building discussion
- identify common barriers to consensus building
- apply strategies to overcome those barriers
- provide guidelines for assessment team members on ways to prepare for efficient team meetings
- effectively share team decisions with program staff
- understand the importance of good writing skills to Head Start job performance
- identify areas for improvement in current writing style
- set proper tone for a written document
- select the appropriate wording and phrasing for expressing the intent of specific documents
- write clear and concise statements of program strengths and review findings for reports
- identify and correct common grammar, punctuation, and spelling errors
- determine the appropriate format for note-taking, and writing memos, letters and reports

Recommended Group Size: Groups of 3 to 15 participants, with at least one representative from each of these skill groups: 3–C, Facilitation: Fundamentals of Leading Meetings; 3–D, Decision-Making: Building Consensus; 3–E, Communication: Effective Spoken Communication; 3–F, Communication: Active Listening Skills, and 3-G, Communication: Effective Written Communication.

Materials. Newsprint and markers

Components

Step 1. Handout: The Hillside Challenge (Scene 1)	5 min.
Step 2. Worksheet: Case Analysis	15 min.
Step 3. Handout: The Hillside Challenge (Scene 2)	5 min.
Step 4. Worksheet: Applying Facilitation and Consensus Building Skills to Tomorrow’s Meeting	25 min
Step 5. Handout: The Hillside Challenge (Scene 3)	5 min.
Step 6. Worksheet: Sharing the Results with Valerie	50 min.
Step 7. Handout: The Hillside Challenge (Scene 4)	5 min.
Step 8. Worksheet: Seeking Clarity on Program strengths and Findings	45 min.
Step 9. Post Assessment	15 min.
Suggested total time	2 hr., 50 min.

This activity contains 18 pages.



STEP 1. HANDOUT: THE HILLSIDE CHALLENGE (SCENE 1)

Suggested time: 5 min.

Read Scene 1, then go to the Step 2 Worksheet.

Sally is a federal office review team leader. During a review team meeting at the Hillside Head Start program on day two of the on-site review, two of the consultants disagree on their evaluation of the program's human resources system.

“From the staff group interview that I attended in the program's main satellite center,” says Frank, “It sounds as if the Hillside human resources system is full of holes. Several of the staff have had no performance review for over a year. When I asked about staff development, they said that they attend the same, tired, inservice workshops year after year. I asked about the personnel policies, but staff couldn't remember seeing a copy and didn't know how to get one. Between you and me, I think this is a major problem. One of the family workers said her manager had never once accompanied her on a home visit. I have a lot of concerns about this part of the program.”

“Really?” says Lena, another the member of the review team. “That's not what we heard in the Management Team Interview yesterday. They told us that each center manager meets regularly with the staff she supervises and schedules performance reviews twice a year. Staff participate in setting goals and deciding how to achieve them. The program's training plan grows out of these goal-setting sessions.” Lena turns to Sally. “Maybe it's just a center-specific problem, and not a programwide problem at all.”

STEP 2. WORKSHEET: CASE ANALYSIS



Suggested time: 15 min.

Purpose: To give participants a chance to begin to address the issues raised in the Hillside case.

Part I (5 min.) Answer these questions on your own, using Activity 3–E, Effective Spoken Communication, to inform your responses if you so choose.

1. Are Frank and Lena communicating effectively? Explain your response.

2. Which of these would you say describe Frank?

- gives some good examples
- distinguishes between facts, inferences, and assumptions
- refrains from making a judgment until he has enough information
- bases his judgment on more than one example
- is open to new and unfamiliar systems and services

3. Which of these would you say describe Lena?

- gives some good examples
- distinguishes between facts, inferences, and assumptions
- refrains from making a judgment until she has enough information
- bases her judgment on more than one example
- is open to new and unfamiliar systems and services

4. Reflect back on what Frank and Lena had to say. What types of information do they need to collect in order to resolve their difference of opinion?

5. What steps does Sally need to take with the review team?

Part II (10 min.) Reconvene with your group (or pair up with another participant) to discuss your answers and your reasons for choosing them.

Stop! Please complete this Worksheet before turning the page.

STEP 3. HANDOUT: THE HILLSIDE CHALLENGE (SCENE 2)



Suggested time: 5 min.

Read Scene 2, then go on to the Step 4 Worksheet.

In the evening, Sally reflects on the team meeting that day. When she goes out to get some dinner, she runs into Fernando, one of the review team members, in the hotel lobby.

“I’ve been thinking a lot about the meeting we had today. People have collected lots of good information through interviews, observations, and record reviews but are having difficulty knowing what to do with it. We have another chance to revisit this in the morning, but I think we need a different kind of meeting.”

“You know,” Fernando says, “I’ve participated in many program reviews, and it seems that the ones that work out best are those where the chair takes some specific steps to facilitate the meeting.”

“I think you’re right,” says Sally. “And in addition to running the meeting differently, I want to give the team members some advice about steps that we can all take together to come to a decision about whether or not the Hillside’s human resources systems are effective.”



STEP 4. WORKSHEET: APPLYING FACILITATION AND CONSENSUS-BUILDING SKILLS TO TOMORROW'S MEETING

Suggested time: 15 min.

Part I (10 min.) Form small groups of three to five people. Include in each group at least one participant who took part in the Facilitation Activity. Hold a conversation about what Sally can do the next day to make the team meeting more effective. How can the PACT approach be applied?

Purpose. Sally can begin the meeting by saying:

Agenda. Sally can write out the following agenda items on newsprint:

Chair. As chair of the meeting, Sally's main tasks are to:

Team ground rules. Given the dynamics of yesterday's meeting, Sally may need to remind the team of the following ground rules: _____

Part II (5 min.) Compare your responses with those of another small group and discuss the reasons for your answers.



STEP 5. HANDOUT: THE HILLSIDE CHALLENGE (SCENE 3)

Suggested time: 5 min.

Read Scene 3, then go on to the Step 6 Worksheet.

On day 3 of the review, Sally, Frank, Lena, and Fernando get together to focus on the additional data collected about Hillside's human resource systems.

The investigation confirms that both Frank and Lena were right. The program does have systems in place for supervision and performance appraisal and the program-training plan is supposed to grow out of these systems.

However, the system is not being fully implemented. At the center that Frank visited on the first day and in the two other centers, staff performance reviews are done late or not done at all, and staff training needs weren't considered at developing inservice training. The picture is brighter at the program's four other centers, where managers are on top of their performance reviews and provide regular and supportive supervision.

A major concern of the team is that the human resource system has no mechanism for letting Valerie, the director, find out when the system isn't working. Right now the system depends on Valerie to remember to ask about performance when she meets with the center directors. Lately, Valerie has been busy trying to open a new center and hasn't met regularly with center directors.

The team agrees that on the whole the human resource system is effective, but that there are findings in the areas of performance appraisals and staff development that Valerie and her team need to address.

STEP 6. WORKSHEET: SHARING THE RESULTS WITH VALERIE



Suggested time: 25 min.

Purpose: To provide participants with practice in communication.

Part I (15 min.) Divide into two groups to role play a conversation between Sally and Valerie. As each group works through the exercise, invite participants who have completed relevant skill activities to share their insights

1. Take 10 minutes to decide what message Sally needs to deliver to Valerie in a private meeting on the last day of the review. Be sure to include the reason for your decision and the team's suggestions for program improvement. Draw on the information in Scene 3 as well as your own experience in similar situations to shape Sally's communication to Valerie. Plan on the conversation taking 5 minutes.
2. Select a group member who completed the Communication Activities to play Sally. Select a second member to play Valerie. Any other team members will act as observers, using the Role Play Observation Chart that follows this exercise.
3. As a group, review handouts on communication and listening from the two Communication Activities.
4. Decide which group will deliver the message first.
5. At a location that is visible to all participants, conduct a role play between the "Sally" of one group and the "Valerie" of the other. All other participants make notes on the Role Play Observation Chart.
6. Conclude the role play. Observers, review your notes and share your observations with the role players and the other observers. Take special note of observations that differ from those of other observers.
7. Repeat the exercise with the second Sally and Valerie.

Part II (10 min.) At the conclusion of the role plays, answer the following questions.

1. In her conversation with Valerie, did Sally clearly and effectively share her decision and rationale for making the decision? What was the rationale?
2. In terms of verbal and nonverbal reactions, did you feel Valerie actively listened to Sally and understood why Sally made the decision she did? Did she ask for clarification of remarks she did not understand?
3. Was Sally's suggestion for program improvement communicated clearly?
4. Was the interaction between Sally and Valerie one that would strain future working relations or help them? Please describe the behavior and the impact you think it will have on future communication and teamwork.

ROLE PLAY OBSERVATION CHART

Behavior Observed	Sally 1	Valerie 1	Sally 2	Valerie 2
Body language				
Tone of voice				
Gestures used				
Physical stance				
Facial expressions				
Aggressive language				
Other				

STEP 7. HANDOUT: THE HILLSIDE CHALLENGE (SCENE 4)



Suggested time: 5 min.

Read Scene 4, then go to the Step 8 Worksheet.

Sally went back to her office at the conclusion of the data collection for the Hillside Head Start Program review to begin to draft the report. Review team members Frank and Lena came by her office to take a look at the recommendations for the review decisions. Although the team had reached consensus on the recommendations Sally wanted the team to take another look at them to ensure that the findings and identified program strengths were clearly stated.

“It’s important that Hillside understands the corrective action we are recommending for the improvement of the program’s overall performance appraisal and staff development process”, says Sally. “I agree”, says Frank, “But I am not sure the wording of the finding reflects the seriousness our concerns. It states that “ although it is not a major concern, the implementation of the performance appraisal system could use some improvement.” The wording sets a tone that is not consistent with our recommendation for considerable enhancements to their current process. Their failure to effectively and consistently an appraisal process has had a very negative impact on staff performance and morale, as well as delayed critical staff development. I want us to be very clear about why we are recommending corrective action.”

Sally and Lena nodded their heads in agreement with Frank’s comments, and went about the task of re-writing the finding related to the program’s performance appraisal system.



STEP 8. WORKSHEET: DEVELOPING STATEMENTS OF FINDINGS AND STRENGTHS

Suggested time: 45 min.

Purpose: To provide participants with practice in writing program review findings and strengths statements.

Part I (30 min.) Individually, or in pairs:

1. Write 2 examples of Hillside Head Start program strengths as indicated in Scenes 1, 2 and 3.
2. Write 2 examples of Hillside program review findings as indicated in Scenes 1, 2 and 3.
3. Re-write the finding related to Hillside's performance appraisal system as indicated in Scene 4.

Part II. (15 min.) Select a partner (if working individually) and review and discuss your strengths and findings statements. Use the following questions as a guide.

- Does your statement clearly present the facts of what was observed, heard or discussed regarding the issue?
- Does the tone and wording convey the intent of the statement?
- If you were the person who received your statements would you clearly understand the concern and what was expected in terms of a response?



STEP 9. POST-ASSESSMENT

Suggested time: 15 min.

The skill-development exercises and the Application Activity in Job Performance Situation 3 were designed to keep you building skills in the areas of *decision-making*, *facilitation*, and *communication*. This Post-Assessment will help you reevaluate your competencies.

Part I

I completed the following exercises in Job Performance Situation 3:

- _____ 3-B, Case Activity: Building Essential Skills in Facilitation, Decision-Making, and Communication
- _____ 3-C, Decision-Making: Building Consensus
- _____ 3-D, Facilitation: Fundamentals of Leading Meetings
- _____ 3-E, Communication: Effective Spoken Communication
- _____ 3-F, Communication: Active Listening Skills
- _____ 3-G, Communication: Effective Written Communication

Part II

Reassess your skills in the following areas:

SKILL: *FUNDAMENTALS OF LEADING MEETINGS*

Rate your current skills in addressing situations in which you need to

	New skill for me		Some skill	Highly skilled	
1. <i>Understand and manage a group process:</i>	1	2	3	4	5
2. <i>Create a shared purpose in a work-based team:</i>	1	2	3	4	5
3. <i>Establish ground rules and operating procedures that promote a productive team atmosphere:</i>	1	2	3	4	5
4. <i>Model appropriate team behavior:</i>	1	2	3	4	5
5. <i>Identify and address procedural issues or member behavior that hinders the group:</i>	1	2	3	4	5
6. <i>Help the group stay on task:</i>	1	2	3	4	5

SKILL: BUILDING CONSENSUS

Rate your current skills in addressing situations in which you need to

	New skill for me		Some skill		Highly skilled
1. <i>Recognize when consensus decision-making is indicated:</i>	1	2	3	4	5
2. <i>Provide direction to team members in gathering and presenting supportive documentation:</i>	1	2	3	4	5
3. <i>Generate ideas from others to find a solution:</i>	1	2	3	4	5
4. <i>Review and weigh divergent information and identify areas of commonality and disagreement:</i>	1	2	3	4	5
5. <i>Identify and overcome barriers to consensus building:</i>	1	2	3	4	5

SKILL: EFFECTIVE SPOKEN COMMUNICATION

Rate your current skills in addressing situations in which you need to

	New skill for me		Some skill		Highly skilled
1. <i>Ask questions that help others understand their assumptions and interpretations about their own viewpoint:</i>	1	2	3	4	5
2. <i>Summarize others' remarks in order to gain clarity:</i>	1	2	3	4	5
3. <i>Present information that distinguishes between fact and interpretation:</i>	1	2	3	4	5
4. <i>Build rapport in interpersonal communication:</i>	1	2	3	4	5

SKILL: ACTIVE LISTENING SKILLS

Rate your current skills in addressing situations in which you need to

	New skill for me		Some skill	Highly skilled	
1. <i>Listen actively to further communication:</i>	1	2	3	4	5
2. <i>Build rapport through verbal and nonverbal means:</i>	1	2	3	4	5

SKILL: EFFECTIVE WRITTEN COMMUNICATION

Have you experienced this or a similar situation in which you needed to use effective written communication skills? _____yes _____no

If yes, were you satisfied with the outcome? _____yes _____no

If you have not handled this type of situation much, would you feel comfortable addressing it? _____yes _____no

Rate your current skills in addressing situations in which you need to:

	New skill for me		Some skill	Highly skilled	
1. <i>Determine the proper form for notetaking and writing letters, memos and reports:</i>	1	2	3	4	5
2. <i>Set the proper tone for a written document:</i>	1	2	3	4	5
3. <i>Select the appropriate wording and phrasing for expressing the intent of specific documents:</i>	1	2	3	4	5
4. <i>Write clear and concise statements of program review findings and strengths for use in review reports:</i>	1	2	3	4	5
5. <i>Utilize correct grammar, punctuation and spelling:</i>	1	2	3	4	5

Part III

Use your answers to the following questions to finish filling in your Learning Plan for Job Performance Situation 3 (at the end of 3–A).

- A. In which competencies would you like to continue your skill building?

- B. What steps will you take to continue your skill building in these areas?

- C. How can managers, your supervisor, team members, and other colleagues support you in your continued skill development?