

## Introduction Module

### Slide 1:

#### **Instructor/Facilitator Talking Points:**

- Introduce him/herself
- Introduce the topic, that this is a 5 part training program, and that Module 1 will introduce them (i.e., educators/school staff learners) to why training on teamwork is useful for them
- What they can expect during training (e.g., interactive and informative)

### Slide 2: Contributors

### Slide 3:

**Note to instructor:** *The purpose of this slide is to engage the participants, so allow them to respond to the vignette and share their own teamwork failure stories. This vignette has been adapted from an interview with a real teacher who talked about experiencing a similar situation. Participants may be better drawn in if they are aware of this fact. If you choose to give time to sharing of stories then be cognizant of the time you have to get through all the material. Don't allow the conversation to go on too long but try to get everyone engaged.*

#### **Instructor/Facilitator Talking Points:**

- Vignette comes from one teacher's real-world experience
- **Read:**
  - Wei was a member of his grade level team, seeking feedback from his colleagues about a difficult student who was giving him tremendous trouble in class. He explained that the student was acting out for unknown reasons but he thought that something might be going on at home that had sparked the student's sudden misbehavior. Wei wanted advice on how to handle the student during school hours and how to approach the student's parents about the problem without causing offense or seeming judgmental. Though well meaning, many of Wei's colleagues began talking about their own experiences with troubled students. Each was eager to share his or her stories and very quickly the focus of the discussion had moved away from helping Wei brainstorm strategies for handling the student and the parents. Wei, who is naturally agreeable and reserved in nature, found himself at a loss for how to bring the topic back to his concerns.
- **Ask** participants whether this vignette represents a situation they have experienced. Probe them to share similar stories and talk about how lessons in teamwork may have helped in this and their situations. Make sure the discussion doesn't go on for too long but that most people engage.

### Slide 4:

**Note to instructor:** *Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** *This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.**

#### **Instructor/Facilitator Talking Points:**

- Lets begin by watching this example of teamwork in action in a school.
- **ASK:** Do you agree with the sentiments of this video?

#### Slide 5:

##### Instructor/Facilitator Talking Points:

- **ASK:** How many of you have taken a teamwork training course before?
  - **Note to instructor:** Chances are, not many people have taken a formal teamwork training course before and you can use this in your favor to drive home how it could be valuable for them to participate in this teamwork training
- **SAY:** Teamwork training has been successfully used in other high-stress, high-stakes environments such as aviation, the military, and healthcare.
- **TEACH** Teamwork was developed by the American Psychological Association's Coalition for Psychology in Schools and Education in collaboration with the Department of Human-Systems Interactions Research at the University of Central Florida, where teamwork training systems are developed and evaluated. The resulting collaboration provides an evidence-based program aimed at optimizing performance among teams of PreK-12 educational professionals, enabling them to meet their team goals and adapt to changing conditions. This curriculum incorporates more than 30 years of scientific research on teams.
- **TEACH** Teamwork utilizes this research and packages the information for the educational professional. The goal is to give you practical knowledge and tools to optimize the success of all your teams. Each module is designed to be self-contained and to provide instruction on four teamwork competencies

#### Slide 6:

##### Instructor/Facilitator Talking Points:

- To derive the greatest amount of benefit from this training you should understand why teamwork is important in schools, appreciate why learning about teamwork is relevant to you, and understand the advantages of teamwork
- Let's talk about some of these themes... (go to next slide)

#### Slide 7:

**Note to instructor:** Be aware of the time you have available. Do not let the discussion go too long if you have a limited amount of time. Should your time be limited, you may want to pick and choose which questions to address.

##### Instructor/Facilitator Talking Points:

- **SAY:** You have likely had some sort of experience working on teams. You may have come to understand the challenges that can arise when working with others to achieve a shared goal.
- Think for a moment about your experiences with teamwork.
- **ASK:** How often do you need to work collaboratively with others on a shared goal?
- How much of what you do at work is dependent upon others?
- How does teamwork impact your experience at work?
- What sort of challenges have you experienced when working with others towards a goal?

#### Slide 8:

**Note to instructor:** Be aware of the time you have available. Do not let the discussion go on for too long if you have a limited amount of time. Should your time be limited, you may want to pick and choose which questions to address.

##### Instructor/Facilitator Talking Points:

- Direct the group to recall our friend Wei from the vignette in slide 2
- Facilitate discussion using the questions on the slide
- *Potential answers to these questions include:*

How might learning about teamwork help Wei? *He may learn some strategies to redirect the conversation to obtain assistance with solving his problem.*

How might learning about teamwork benefit Wei's colleagues? *It may teach them to collaborate to focus on the issue at hand and assist their coworker.*

How is Wei's situation similar to your experiences?

How might learning about teamwork benefit you and/or your colleagues?

#### **Slide 9:**

**Note to Instructor:** *This slide has animation. You will need to click the mouse or right arrow key while the PowerPoint is in "slide show mode" to activate each of the images. When the PowerPoint slides are open on a computer you may get to slide show mode by clicking the projector screen icon at the bottom of the PowerPoint screen. This icon is located on the right hand side of the screen, just left of the zoom bar. Alternatively, you may open slide show mode by clicking the "Slide Show" tab at the top of the PowerPoint screen and choosing either the "From Beginning" or "From Current Slide" icons. "From Beginning" will take you to the start of the presentation when the slide show mode opens whereas "From Current Slide" will allow you to open the presentation from this slide.*

#### **Instructor/Facilitator Talking Points:**

- Some ways learning about teamwork can benefit you might include: [**Note to Instructor:** *some of these things may have been mentioned by the participants during discussion of the questions on the previous slide and that's okay, you might just want to acknowledge the redundancy*]:
  - Smoother, more efficient meetings
  - Easier and improved interactions with:
    - Persons of a different educational and/or professional background (e.g., such as those seen on IEP teams)
    - Parents
  - Stronger personal and professional relationships with your colleagues
  - Stronger professional support system
    - Better ability to leverage the collective experience of your colleagues
  - Enhanced job satisfaction and school pride
  - Manage multiple team memberships
  - Saved time

#### **Slide 10:**

**Note to Instructor:** *This slide has animation. You will need to click the mouse or right arrow key while the PowerPoint is in "slide show mode" to activate each of the images. However, unless you are short on time, wait to activate the animation until after you have given the group a chance to describe teams on their own.*

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**Note to instructor:** *Allow the group a few minutes to come up with some adjectives before putting the images on the screen but be aware of the time you have available. Skip the brainstorming if you are short on time.*

#### **Instructor/Facilitator Talking Points:**

- **ASK:** How would you describe what a team is?

**SAY:** Teams are two or more people who interact dynamically, interdependently, and adaptively toward a common goal or objective

**Slide 11:**

**Instructor Note:** Kristen Arnold, MBA, CMC, CPF, CSP specializes in facilitating groups of people to achieve a specific object and deliverable. **To Play Video:** Quicktime will need to be installed on the presentation computer in order for the video to play. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor Hint:** If you are short on time you might consider skipping this slide. The distinction between group and team is not critical to understanding the larger training content, however it may be interesting to participants to learn about this viewpoint, which is how teams researchers distinguish between groups and teams.

**Instructor/Facilitator:**

- Many people think of groups and teams as interchangeable terms. However, groups are a collection of people who likely have something in common. A team is a special type of group that works together towards a shared goal. This video shows Kristen Arnold sharing a great example of how to tell the difference between a group and a team.
- **ASK:** What do you think about this distinction? Does it matter to you? Does it change how you think about teamwork?

**Slide 12:**

**Note to Instructor:** This slide has animation. You will need to click the mouse to activate the images. However, unless you are short on time, wait to activate the animation until after you have given the group a chance to describe teamwork on their own.

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**Instructor/Facilitator Talking Points:**

- **ASK:** Now we understand there is a clear difference between groups and teams but what, exactly, is teamwork?
- **SAY:** Teamwork involves the interplay of multiple people pursuing a shared goal (e.g., develop curriculum; ensure children progress academically; set benchmarks). Teamwork is more precisely defined as *the combination of members' interrelated thoughts, actions, and feelings that produce coordinated and adaptive team action.*

**Slide 13:**

**Instructor/Facilitator Talking Points:**

- This training will be informative, interactive, and somewhat informal, with an emphasis on the interactive
- We are here to learn together, share experiences, and practice the teamwork strategies
- Throughout the training we will hear from a number of famous and successful individuals about their perspectives on teamwork
- Feel free to present your opinions and ask questions of your peers

- Together, we will learn how to be better teammates and colleagues and we can take this course at our own pace

**Slide 14:**

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**Instructor/Facilitator Talking Points:**

- This training presents 4 teamwork skills: communication, situation monitoring, mutual support, and leadership
- Each of these will be presented in some depth within each of the following modules included in this training package
- Although these skills are treated separately, mostly for simplicity's sake, you will likely begin to realize how interrelated all of these skills are
  - For example, situation monitoring is critical to knowing when team mates need additional support, and communication is paramount to good leadership and providing necessary support to team mates

**Slide 15:**

References

## Communication Module

**Slide 1:**

Communication

**Slide 2:**

Contributors

**Slide 3:**

**Note to instructor:** *The purpose of this slide is to engage the participants, so allow them to respond to the vignette and share their own teamwork failure stories. This vignette has been adapted from an interview with a real teacher who talked about experiencing a similar situation. Participants may be better drawn in if they are aware of this fact. If you choose to give time to sharing of stories then be cognizant of the time you have to get through all the material. Don't allow the conversation to go on too long but try to get everyone engaged.*

**Instructor/Facilitator Talking Points:**

- **READ:** The principal of McKenna Elementary held a meeting during which the teachers were to devise a schedule for the children regarding time spent with their primary teacher and the specialized teachers (e.g., art, music). Once the meeting began, the principal quickly opened the floor for discussion. The Physical Education teacher shouted, ""The students should spend more

time each week in PE than they do in music!” The music teacher barked back, “Absolutely not! There should be equal time devoted to PE and music!” From there, all of the teachers began raising their voices and arguing about whose time was more valuable to the students.

- **ASK:** While this is a little bit of a theatrical example which may or may not well represent your experiences, what may be hindering communication in this situation?
  - Possible Answers: *Different communication styles (e.g., several assertive teachers in competition); Conflicting interpersonal styles (e.g., PE teacher is disinhibited and self-advocating); Interpersonal & group conflict (due to competition); Strong emotions*
- **ASK:** What could the principal or one of the team members in this meeting could have done to help people to communicate more effectively (as either the sender or receiver of the communication)?
  - Possible answers: *Halted the meeting until tempers subsided; Someone could have suggested that each teacher explain how long students should be scheduled in their class and why.*

#### Slide 4:

##### **Instructor Notes:**

- *Lido Anthony “Lee” Iacocca is an American businessman known for engineering the Ford Mustang and Ford Pinto cars. He served as President and CEO of Chrysler for 1978 and additionally as chairman from 1979, until his retirement at the end of 1992.*
- *Mike Krzyzewski is the Duke and United States National Basketball Head Coach.*
- *Peter F. Drucker was an Austrian-born American management consultant, educator, and author, whose writings contributed to the philosophical and practical foundations of the modern business corporation.*

##### **Instructor Notes:** Additional interesting quotes on communication include:

- *“Constantly talking isn’t necessarily communicating” – Charlie Kaufman, Charles Stuart “Charlie” Kaufman is an American screenwriter, producer, director and lyricist.*
- *“The single biggest problem in communication is the illusion that it has taken place.” – George Bernard Shaw was an Irish playwright and a co-founder of the London School of Economics*
- *“To effectively communicate, we must realize that we are all different in the way we perceive the world and use this understanding as a guide to our communication with others” – Tony Robbins, Anthony “Tony” Robbins is an American life coach, self-help author, and motivational speaker.*

##### **Instructor/Facilitator Talking Points:**

- Here we have several quotes from some very successful individuals. Lee Iacocca is an American businessman who engineered the Ford Mustang and Pinto and was CEO of Chrysler. Peter Drucker was a management consultant and writer who’s insights contributed to the formation of the modern business corporation. Mike Krzyzewski is the Head Coach for both the Duke basketball program and the United States’ National team. In short, these are some pretty successful men. Here’s what they have to say: [*note to instructor: read each of the quotes*]
- **Ask:** What are the themes we are seeing in these quotes?
  - Communication is key to team success
  - Sometimes what is being said is not the whole picture
  - Communication does not always come easily, but it can be learned! [*note to instructor: go to the next slide, which goes over the module learning objectives, after making this point*]

#### Slide 5:

##### **Instructor/Facilitator Talking Points:**

- The purpose of this module will be to understand the importance of communication, identify barriers to effective communication, learn what clear, brief, timely, and complete messages look like, and communicate critical information through structured information techniques

**Slide 6:**

This first section of this module is informational in nature, including the purpose of communication, barriers to effective communication, and characteristics of strong communication.

**Slide 7:**

**Note to Instructor:** *This slide has animation. You will need to click the mouse to activate each of the images.*

**Note to instructor:** *Allow the group a few minutes to discuss what communication is before putting the images on the screen but be aware of the time you have available. Skip the brainstorming if you are short on time.*

**Instructor/Facilitator Talking Points:**

- **Ask:** How would you explain what communication is?
- Communication is the exchange of information between a sender and recipient(s). As we will touch on later, good communication will create a dialogue that ensures the intended message is received and understood.
  - The person who begins the communication discourse is referred to as the *sender* while the person(s) to whom the initial message is directed are referred to as the *receiver(s)*. Of course, during dynamic discourse, such as closed-loop communication which will be covered later in this module, the *sender* becomes the *receiver* when the original recipient responds to the original message. However, for the sake of clarity, the static labels *sender* and *receiver* help us to keep the communication participants straight
- Although people communicate for many reasons, the ultimate purpose is to create a shared perspective between two or more people. Communicating allows people to exchange information that can influence how we think and feel about one another and our environment. Within schools, communication is a critical tool for providing a safe, pleasant, and effective learning and working environment.
- When a team is able to effectively communicate, the result is often a seamless integration of different talents that contributes to a product or outcome that no one person working alone would be able to create.

**Slide 8:**

**Instructor/Facilitator Talking Points:**

- Communication is the foundation for teamwork as it is the conduit through which all other aspects of teamwork and collaboration can take place. It enables leaders to clarify team roles, define team norms, and provide performance-based feedback. Communication enhances the delivery and effectiveness of mutual support and is how team members share information they obtain during situation monitoring. Each of these teamwork competencies will be addressed in detail in other modules, but communication is the vehicle through which they are manifested.

**Slide 9:**

**Note to Instructor:** *This slide has animation. You will need to click the mouse to activate each of the images.*

**Instructor/Facilitator Talking Points:**

- As we know, there are often a lot of barriers to communication.

- **Ask:** What sorts of communication barriers have you experienced?
- These include:
  - Emotion
  - Competing priorities
  - Unverified information
  - Language differences
  - Lack of physical proximity
  - Wordy or unclear messages
  - Diverse communication and interpersonal style (e.g., disinhibited vs. inhibited; avoidant vs. assertive)
  - False sense that others know what they are thinking
- How we navigate and respond to these challenges will determine how effectively we are able to communicate. Later in this module we will talk about and practice some well-established strategies that facilitate good communication.

**Slide 10:**

**Instructor/Facilitator Talking Points:**

- There are several ways in which we communicate with one another: we speak, we project information non-verbally through our body language or a written medium, and we listen. When using non-verbal communication, it is important for you to understand how much body language, or any other form of non-verbal communication, can alter the meaning of a spoken message.
- Of course, the effectiveness of our communication and how information is sent and received is greatly influenced by other factors such as the audience you are speaking to and the media being used, so it is useful to bear in mind to whom and how we are communicating. Depending on what team member you are speaking to, your interaction may vary. For example, if you are talking to a more senior leader, you may have more of a formal conversation; whereas, if you were speaking with a peer on your team, your conversation may be more colloquial. It is also important to note that certain media modes of communication may require further clarification. Such as non-verbal communication and e-mail.

Cannon-Bowers, Tannenbaum, Salas, & Volpe, 1995

**Slide 11:**

**Instructor Tip:** *This is an excellent time to offer a break or stop completely for the day, depending on the time constraints of your class.*

**Instructor/Facilitator Talking Points:**

- In Part 2 of this module we're going to move away from talking about what communication is and why it's important and begin exploring how we can have effective communication. But first, let's review a few of the concepts from Part 1.

**Slide 12:**

**Tip for Instructor:** *Ask these questions to the group at large and after the correct answer to each question is given, write it down on a public medium (e.g., blackboard, whiteboard, easel notepad, poster, etc.) where they can be displayed for the remainder of the training.*

**ANSWERS:**

1. Exchange of information of sender and receiver to create a shared perspective between two people.
2. Nonverbal, speaking, writing, listening, media
3. Strengthen leadership and mutual support, and for monitoring a team's situation



4. Competing priorities, unverified information, language differences, a lack of physical proximity, or communication style/wordy messages

**Slide 13:**

**Instructor/Facilitator Talking Points:**

- We are going to cover two types of communication strategies that are useful in schools. The first is closed-loop communication and the second strategy is SBAR. As we discuss these strategies we will discuss approaches that will enhance how a message is communicated and received.

**Slide 14:**

**Instructor/Facilitator Talking Points:**

- When we say “closed loop communication” we are referring, broadly to
  - Sending information by the Giver
  - Receipt of information by the Getter who should paraphrase the message back to the receiver and check that s/he correctly understood the intent
  - Confirmation by the Giver that the message was received and correctly interpreted
- In this part of the training, we will explore more closely all of the ways that these three actions can be carried out successfully
- Let’s break down this process in more detail.

**Slide 15:**

**Instructor/Facilitator Talking Points:**

- Closed-loop communication begins with the initiation of a message by a Giver. To be best understood, the message should be clear, brief, timely, and complete. We will explore what each of these things are and their criticality in just a moment.
- If the communication is direct, the Getter should listen quietly and attentively as they accept the message. This is, of course, moot if the message was sent through some sort delayed message system, such as e-mail, voicemail, or text message.
- In addition to confirming that the message has been received, the Getter should paraphrase, perception check, and clarify the message with the sender to establish correct understanding of the intended message. We will discuss each of these processes in a moment.
- If while clarifying the message, the Giver realizes the Getter has not correctly understood the intended message, the Giver should attempt to explain the message until the Getter and Giver both similarly understand. Once it is obvious that the message was correctly interpreted by the Getter, the Giver should confirm that the Getter understands.
- Should a Getter fail to confirm the message, the Giver should follow-up with the recipient until confirmation has been obtained. It is especially important to follow-up with a Getter who has not closed the loop if the message was sent through an indirect communication medium, such as e-mail. There is always the possibility that the message was lost in a messy inbox or there was a delivery failure.
- Of course, communication is a reciprocal process so there are times when the initial speaker, the sender, becomes the receiver of information. However, to present a clear concept of communication we rely on the terms "receiver" and "receiver" in this module to label the different roles.

**Slide 16:**

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<http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor Note:** The beginning of this skit uses the terms sender and receiver which refer to Giver and Getter, respectively

**Facilitator/Instructor Talking Points:**

- Now that you've learned about closed-loop communication, think about its implications for the following exchange between Abbott and Costello, who are experiencing a communication barrier.
- **DO:** Press play on the video.
- **ASK:** What is the problem these two are experiencing? What is the barrier that is getting in the way?
  - Answer: *Each person is using language in a different way. For example, from one man's perspective "who" represents a name. Yet, from the other man's perspective, "who" signals a question. Here we have a language barrier.*
- **ASK:** How would have using closed-loop communication have helped these men arrive at a similar understanding?
  - Possible answer: *After quietly listening to the message, the recipient (i.e., Costello) could have asked the sender (i.e., Abbott) to clarify the name of the person on first. (Of course, this would have been much less funny).*

**Slide 17:**

**Instructor/Facilitator Talking Points:**

- As we just saw in the Abbott and Costello comedy bit, it is important when communicating to ensure that your intended message is received correctly. In order to facilitate this, communication should be clear, brief, timely, and complete. We will now go over each of these four features of effective communication.

**Slide 18:**

**Note to Instructor:** This slide has animation. You will need to click the mouse to activate each of the images.

**Instructor/Facilitator Talking Points:**

- Effective communication is clear. In other words, it is easily understood by other team members. You can increase the clarity of your message by using terminology that team members will understand.
- In addition, effective communication is brief. If a message is too long, important pieces may go unheard. Sometimes it's not about finding the words, but limiting them. Try to say what you need to say in as few words as possible. Not only will it help people understand, it will save everyone a little time.
- Effective communication is timely. If a message comes too late, it will be ineffective, superfluous, or could have disastrous consequences.
- Finally, effective communication is complete. While a message should be concise, it should also include all important and relevant information. Otherwise, the message may be misunderstood.

**Slide 19:**

**Instructor/Facilitator Talking Points:**

- In the context of a problem-solving or grade level team, teachers need to know how to effectively relay their concerns about a student in a clear, brief, timely, and complete way.

- For this exercise you will need a partner. You will each have 3-5 minutes to clearly, briefly, and completely tell your partner about a problem you are having with a student. Your partner will then take 3-5 minutes to provide feedback to you about the effectiveness of your message. You will then switch roles. When providing feedback to your partner, focus on whether their message was clear, brief, and complete.

**Slide 20:**

**Instructor/Facilitator Talking Points:**

- Now we are going to examine good listening skills. Stephen Covey, the author of *Seven Habits of Highly Effective People*, recommends you understand others before seeking to be understood yourself. Three strategies you can use to be sure you understand the Giver's message are paraphrasing, perception checking, and asking clarifying questions.

**Slide 21:**

**Instructor/Facilitator Talking Points:**

Listening is so important to communication not only because it is how we absorb the message that the other person is sending but because effective listening builds trust and self-esteem. By being a better listener you are signaling to your colleagues that you care about their thoughts and feelings as well as making them feel that they are important and their contribution is worthwhile. You'll also find that the more you attend to what people are sharing, the better you are as a teammate and colleague and the better you feel about your own abilities.

One key tip is to give a short pause of about 3 seconds after a person stops talking before you respond. When you pause you accomplish 3 goals:

- You avoid the risk of interrupting the person if they are trying to gather their thoughts or pausing for breath
- You show the other person that you are giving careful consideration to his or her words
- You'll hear the other person better, allowing the person's words to be fully processed and the intended message to be better understood

As we have previously discussed, two other key behaviors in effective listening include clarifying the message and paraphrasing. Do not assume you have understood the message and it is always better to paraphrase what you thought the person was saying in order to confirm you accurately understood. Together, paraphrasing, perception checking, and asking clarifying questions can ensure you received the intended message.

**Slide 22:**

Paraphrasing is repeating the communicated message back to the sender using your own words. By paraphrasing, you are checking that you have understood the intended message. This allows the sender to provide you with any feedback and correct any misunderstandings.

For example, a teacher may tell you that he feels the new school policies are requiring him to push through too much information too quickly. He feels that he does not have enough time to work through the material thoroughly with many of his students. To paraphrase him, you could say, "So you're concerned that the curriculum does not have enough repetition for some of the students in your class. Have I understood your concern?" The sender then has the opportunity to confirm that you understood or to attempt to convey his point another way.

### Slide 23:

**Instructor Tip:** Depending on class size, you may have participants share their paraphrased message with the group, or, if you have a larger class and are short on time, have the participants share their paraphrased messages with a partner and pick one or two to be read aloud for discussion.

#### **Instructor/Facilitator Talking Points:**

- The aim of this quick exercise is the paraphrase the following message from a Giver who has just arrived for a meeting.
- **READ:** I am worried we do not have time to address all of my concerns this week. So, I am hoping to spend the first 30 minutes of this meeting focused on a conversation that I had with Josh's parents. I want to spend the second 30 minutes discussing the ways in which my students seem to be overly impulsive and energized since they returned from Spring break. I'd like to curb the energy level in my class and I am looking for some tips from you.
- **SAY:** Everyone write down how you would paraphrase the speaker's meaning. Now, share your response.
  - Possible response: *You're saying that you are pressed for time and you hope to prioritize two challenges. You would like to focus first on a recent interaction with Josh's parents and then discuss classroom management tips for addressing "high energy" in the class.*
- **Note:** Share a few paraphrased messages and discuss strengths/weaknesses.

### Slide 24:

#### **Instructor/Facilitator Talking Points:**

- Sometimes a speaker has a lot of emotion about what they are communicating. To simply repeat the content does not assure the speaker that he or she has been fully heard. Perception checking is a statement that communicates to the sender that the listener has heard and perceived an emotion in the message.
- **READ:** "You look and sound overwhelmed and rushed. I also sensed frustration in you when you mentioned Josh's parents. Are you feeling frustrated with something?"

### Slide 25:

#### **Instructor/Facilitator Talking Points:**

- Closing the loop is an important communication strategy, particularly when you are working with team members who rely on you and are communicating through non-face-to-face methods (such as e-mail). It entails acknowledgement by the Getter that the message has been received. In an ideal situation, the Getter will not only acknowledge receipt of the message, but will also paraphrase it's meaning, allowing the Giver to clarify or confirm that the message was appropriately understood.
- Should a Getter fail to acknowledge receipt of a message, the Giver should follow-up with the Getter to confirm that the Getter had received the message. Assuming that an important message has been received can have unwanted consequences if it had, in fact, been lost.
- Closing the loop is a simple way to ensure that important information has been shared and understood.

### Slide 26:

**Note to instructor:** Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor/Facilitator Talking Points:**

- Communication and information exchange serve critical functions in our daily life, especially when we must collaborate with others. Therefore, how we choose to communicate with those we interact will have important implications for how we cultivate relationships and meet responsibilities. This video provides a simple illustration of the power and importance of communication.
- **DO:** Press play on the video.
- As this simple video demonstrates, how we choose to elicit information and communicate with one another will influence events. Therefore, it is important to learn how to appropriately and effectively communicate.
- Never assume that you have understood the message. In order for communication to be 100% effective, the sender and the receivers need to actively participate. Just because you may not be the one speaking the message, you still need to speak up about whether you understood the message clearly. Upon receipt of the message, you should confirm that you correctly interpreted the message, and if you did not, then you should ask the sender to either repeat or clarify their message. Always remember: when in doubt, ask!

**Slide 27:****Instructor/Facilitator Talking Points:**

- Sometimes the message is not clear to the listener. Take this example,
- **READ:** “I am pressed for time and frustrated about our time constraints. I am not upset with Josh’s parents at all – the meeting was actually informative and hopeful and I understand much more about Josh’s academic history...”
- **SAY:** Write down what you think was unclear in this message. With a partner, construct a clarifying question or comment.
- **DO:** Ask a few pairs to share their questions.

**Slide 28:****Instructor/Facilitator Talking Points:**

- Excellent. Here are a few other examples of clarifying questions for the previous message.

**Slide 29:****Instructor/Facilitator Talking Points:**

- The SBAR technique provides a framework for communicating information about almost anything and is applicable in a variety of situations from trouble with a student, to interpersonal dilemmas, to bringing a new team member up to speed on what the team has been working on. This technique helps to ensure that all relevant information has been communicated. Variations of SBAR have been successfully used with teams in the U.S. Navy and in healthcare teams.
- SBAR stands for situation, background, assessment, and recommendation. When sharing information begin by explaining the current situation and what is currently going on of relevance. Then describe known background and history relevant to the current situation. Are there facts from previous events that are relevant in this situation? Use what you know to make an assessment about the situation. Describe what you believe the problem to be. Finally, offer a recommendation for handling the situation.

**Slide 30:****Instructor/Facilitator Talking Points:**

**ASK:** What are some situations in which you think using SBAR may be helpful?

- Here is an example of SBAR in action.

- **READ:** Mr. Johansen, I'd like to talk about your third period student, Thomas Smith. Thomas arrived in my office today complaining of problems completing the classwork because he was not able to see the board [*Situation*]. In this past year, Thomas has had multiple instances of not being able to complete his classwork [*Background*]. It seems to me that he might have some vision problems [*Assessment*], and I recommend that he see a doctor [*Recommendation*] so that he is able to get treated and complete his schoolwork in the future.

**Slide 31:**

**Instructor/Facilitator Talking Points:**

- This concludes the module on communication. I hope that you feel even more capable of communicating effectively with your teammates and colleagues. Before you go, let's quickly review some of the major takeaways and actions you should implement in your everyday interactions.
  - Be aware of communication barriers
  - Communicate completely, clearly, briefly and timely with your team members
  - Utilize effective communication in all team processes
  - Verify and share information frequently with your team members

**Slide 32:**

**Instructor/Facilitator Talking Points:**

- Please take a moment to come up with answers to the following questions.
- Now, break up into pairs and discuss your answers. Do either of you have any confusion on the topics covered today? Would you like to share with the group?
- **Note:** Allow two minutes for people to think of their sentence. Select a few people to share their thoughts.
- Potential answers may touch on topics such as barriers to communication, ways in which we communicate, closed-loop communication, and SBAR.

**Slide 33:**

References

## Situation Monitoring Module

**Slide 1:**

**Instructor Talking Points:**

- Today we're going to talk about situation monitoring

**Slide 2:**

Contributors

**Slide 3:**

**Note to instructor:** Quicktime will need to be installed on the presentation computer in order for the

video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor/Facilitator Talking Points:**

- What is change blindness? Change blindness refers to the common phenomenon that is neglecting to notice when a stimulus is altered. Could be visual, tactile, olfactory, etc. In other words, it's failing to notice a change in the environment. It's far more common than we'd like to believe and it is these very changes that we are trying to attend to when we monitor the situation.
- To demonstrate how easy it can be to succumb to change blindness let's watch this demonstrative video.
- **After the video ends ask:**
  - Who saw the disappearing basketball hoop?
  - Who saw the stall change color?
  - How does change blindness apply to your daily work routine?
- The purpose of this module to provide you with information and strategies that will help your team prevent or address/correct change blindness

**Slide 4:**

**Note to instructor:** The purpose of this slide is to engage the participants, so allow them to respond to the vignette and share their own teamwork failure/success stories. This vignette has been adapted from an interview with a real teacher who talked about experiencing a similar situation. Participants may be better drawn in if they are aware of this fact. If you choose to give time to sharing of stories then be cognizant of the time you have to get through all the material. Don't allow the conversation to go on too long but try to get everyone engaged.

**Instructor/Facilitator Talking Points:**

- Emphasize that the vignette comes from interviews with real teachers
- **Read** the vignette
- Tell the audience that recognizing that Karen did not hear the student's name is an example of *situation awareness*, which is an individual state that we will talk about in some detail soon.
- **Ask:**
  - Does this mimic your experiences? Does this sound like a familiar situation?
  - Will you share a time when monitoring the situation helped you? How about a time when failing to monitor had unwanted consequences?
  - What would you do differently?
- This module is designed to talk about the importance of situation monitoring and awareness and how you can achieve both

**Slide 5:**

**Instructor/Facilitator Talking Points:**

- By the end of this module we will be able to:
  - Understand the importance of situation monitoring
  - Understand the importance of cross monitoring
  - Identify barriers to both situation and cross-monitoring
  - Use the STEP mnemonic to anticipate and predict team needs
- These techniques – situation monitoring, cross monitoring, and STEP – are team strategies for addressing change blindness and natural misperceptions that occur in human systems

### Slide 6:

In this first part of the module, we will learn what situational monitoring is and how it works; get a sense of the sorts of scenarios that may call for situational monitoring; and recognize barriers to situational monitoring.

### Slide 7:

**Note to instructor:** *This slide includes animation. While the slide is in presentation mode click the mouse or arrow keys to activate and advance the animation.*

#### **Instructor/Facilitator Talking Points:**

- We'll begin by setting the groundwork for our discussion of situation monitoring.
- As we talk about this try to think of this as a process where the act of continually monitoring (*instructor: advance animation here*) the situation creates an individual state of awareness (*instructor: advance animation here*), that can become shared among multiple people through effective communication (*instructor: advance animation here*).
- Because situational changes are ongoing and ever present it is necessary to continually monitor your surroundings, integrate your observations to update your awareness, and share new insights with teammates.
- To better understand each of the components of this process, imagine you have taken your class of 4<sup>th</sup> grade students out to recess on the playground at a suburban elementary school. The playground is surrounded by a chain-linked fence to keep students from straying, but the area includes a tree line on its outskirts. You are outside with two other teachers, watching the children play and chatting with your colleagues.
- **Ask:**
  - What would you not want to be doing while you are at recess?
    - Example answers include: Ignoring the students, Texting, Talking with other teachers to the point of distraction
  - What do you think the shared goal is between you and other teachers while on the playground?
    - Example answer: You and your colleagues likely have the shared goal of ensuring student safety. Keep in mind that this goal may change in a different situation or you may have additional goals.

### Slide 8:

#### **Instructor/Facilitator Talking Points:**

- Ideally, in addition to any other required duties, you should be continuously scanning the environment to seek out important information, a process known as situation monitoring
- Later in the module we will present one strategy that can be used for monitoring the situation but how might you go about monitoring recess activity?
  - *Instructor note: allow them to share their stories to create engagement*
- **Ask:** How many of you would think to consider your fellow teachers as something you should monitor, as well?
- When consciously monitoring, you, naturally, should actively attend to the students as well as your environmental surroundings to look to things happening in the environment, such as safety hazards, but you will also want to pay attention to your teammates and colleagues. Don't forget that you are also a critical player and so you'll want to monitor what is going on with you, as well.
- Another consideration when monitoring is to assess your goal progress and how current events may affect your ability to do your job and meet your short- and long-term goals



- The overarching objective of situation monitoring is to look for environmental cues such as strange, uncharacteristic, or inappropriate behaviors and attitudes (in the students as well as adults), absence of resources, presence of distractors or safety hazards, etc. that can derail your team's ability to meet its goals.
- Although multiple individuals can monitor the same situation simultaneously, situation monitoring is still inherently an *individual* process.
- Because situations are inconsistent, you need to be continually monitoring your surroundings so as to identify relevant changes
- **Ask:** Why do you monitor the situation?
  - Answer: to attain *situation awareness*

#### **Slide 9:**

##### **Instructor/Facilitator Talking Points:**

- The act of situation monitoring helps you to create your own understanding of the environment, a state called *situation awareness*. Situation awareness is the state of being aware of the status of yourself, teammates, environment, and responsibilities.
- Imagine yourself back on the playground at recess with your students. Envision the chained fence, a tree line, and playground equipment.
- **Ask:** What would you be watching for as you observe the students playing?
  - Examples:
    - Make sure they don't go into the tree line
    - Make sure no one is engaging in violence (e.g., hitting one another)
    - Making sure there are no unidentified individuals in the vicinity
- It is important to recognize that because events change quickly, your situation awareness can rapidly become outdated unless you are continually assessing your surroundings and comparing them to your experience and prior knowledge in order to make judgments about how to handle events or change action plans in order to meet your goals.
- Of course, when you work in collaboration with others it is often helpful when you have a similar and accurate understanding of what is going on around you. In order to achieve this understanding you must communicate with your team members to keep them in the loop and ensure they are aware of everything going on.

#### **Slide 10:**

##### **Instructor/Facilitator Talking Points:**

- Shared situation awareness refers to the degree to which two or more team members have the same or similar understanding of their surroundings. Because of the interdependent nature of teamwork, it is important for team members to display shared situation awareness. Individuals differ on how they perceive events and surroundings. Their impressions are influenced by their experiences, knowledge, and alertness. Sharing a number of personal perceptions of a situation not only helps to ensure team mates are "on the same page" but the greater amount of information helps to create a more accurate understanding of what is truly happening.
- As we will discuss later, shared situation awareness helps team members to coordinate based on the best information available, increases trust, and, ultimately, facilitates team performance.
- But first, let's talk about shared situation awareness a little more in depth.

#### **Slide 11:**

##### **Instructor/Facilitator Talking Points:**

- Imagine that each of the green, red, and blue circles represent the entire knowledge and situational awareness of a different team member. Ideally, through communication of relevant information, team members will create a level of shared situation awareness
- In a poorly functioning team, certain team members may hold different, and even conflicting assessments of situation awareness. As such, this increases their chances of coordinating ineffectively and unproductively; this is depicted in the figure to the left.
- In a smooth functioning team, as shown in the figure to the right, team members demonstrate overlap of their individual situation awareness with other members in different ways.
- Note a few things about how shared situation awareness can manifest:
  - First, not all information may be shared by all team members. For instance, the pink area is shared awareness between the blue team member and the red team member. The green team member does not share in that knowledge. However, Mr. Green does share knowledge with Ms. Red that is independent of the knowledge he shares with Mrs. Blue.
  - Second, the white area denotes information that is shared by Mr. Green, Mrs. Blue, and Ms. Red. However, it is possible in some situations for NO information to be shared by all team members, such as is the case in the image to the left. It is also possible that some team members will share information while some team members remain clueless. How many of you know such a person? In this case, Mr. Green and Ms. Red may be aware of something while Mrs. Blue is unaware, perhaps because she is out sick.
  - Finally, the more similar everyone's awareness is to one another, the more overlap they experience. Perfect shared awareness would be indicated by one circle, which represents the case in which everyone has all the same information as everyone else.
- Differences in knowledge, or awareness, is not always a bad thing. While it is important to share information that can affect how you work with your other team members it is not necessary to share every little detail. For example, say Mrs. Blue sees a student drop a lollipop on the ground. It may not be necessary for Mrs. Blue to tell Mr. Green and Ms. Red that Suzy dropped her lollipop. Thus, Mrs. Blue would know that Suzy lost her lollipop but no one else would unless they, too, saw Suzy drop it. The critical thing is to communicate relevant information so that it can be shared by all team members.
- **Ask:**
  - What sorts of information would you want to share with your colleagues when you are on the playground at recess?
  - What information might you gather from your playground observations that is not necessary to share with your colleagues?

#### **Slide 12:**

**Note to instructor:** *This slide includes animation. While the slide is in presentation mode click the mouse or arrow keys to activate and advance the animation.*

#### **Instructor/Facilitator Talking Points:**

- To recap, situation monitoring is the beginning stage in a process of coming to a state of shared situation awareness with your colleagues. Situation monitoring involves the individual activity of scanning the environment for relevant and potentially game-changing information. We will talk about a specific strategy to situation monitoring later in the module.
- We monitor the situation in order to gain what we call situation awareness, which is the individual state of understanding your surroundings. At this point in the process you have collected information about your surroundings from your personal observations and formed conclusions about what is going on based on your perceptions.

- The next state to be achieved is the state of *shared* situation awareness. Shared situation awareness is, again, two or more people having the *same* or similar understanding of their surroundings. Shared situation awareness is acquired by team members communicating their individual awareness to each other and creating shared conclusions about the situation based on each other's unique information.
- Thus, sometimes your final shared awareness may be different from your initial individual awareness as you learn new information from others or begin to understand the situation from a different perspective.
- Finally, because the situation is ever-changing it is necessary for individuals to continuously scan the environment. That is, it is necessary not to fall into the trap of complacency once you believe you have achieved shared situation awareness, or even your own individual awareness of the situation, for that matter. You must continually be attuned to potential and current changes in the environment. As you recognize these changes you must aim to communicate them to your team members as necessary to update and maintain your shared awareness.

**Note to instructor:** animation begins after the review. Click the mouse or keyboard arrow key to advance the animation.

- Let's consider another example before moving on. Imagine yourself in a project team meeting to discuss an individualized education plan for a troubled student. Recently, a new school psychologist has started at the school and he is trying to get caught up to speed on the student's history. You're meeting in a quiet location after school hours and no students are around.
- **Ask:** What might you be actively scanning the environment for during a meeting among adults such as this?
  - **[Instructor note: allow participants to brainstorm their own answers]** Some answers may be:
    - Whether the room has the appropriate working equipment to proceed with the meeting (e.g., working computers, internet access, projectors, conference line, etc.)
    - Whether your team mates appear to be distracted, tired, or prepared for the meeting
    - Where you left off in your discussion of the student during your last meeting
    - Whether you all are on track to creating a plan to meet the student's unique needs
- Now imagine that that very morning you received an e-mail addressed only to you from the student's mother to inform you that the student would be receiving additional private tutoring after school 3 days a week. In the process of scanning what is happening in the room itself, you notice that the new psychologist keeps rubbing the back of his neck with his hand and clenching his jaw.
- **Ask:** What conclusions might you be drawing from your assessment of the situation at present?
  - **[Instructor note: allow participants to brainstorm their own answers]** Some answers may be:
    - The other team members do not know about the student's new tutoring plan
    - The new psychologist appears stressed. Perhaps he is overwhelmed by his new workload or is experiencing personal troubles
- Your assessment of the situation, and the conclusions you draw represent your personal situation awareness. In this example, you are aware of the psychologist's stress and the student's new tutoring program.
- **Ask:** What would you decide to do next?
  - **[Instructor note: allow participants to brainstorm their own answers]** Some answers may be:
    - Ask the psychologist how he is doing, whether everything is alright
    - Share the news about the tutoring plan first thing when the meeting formally starts. Explain why you feel the tutoring plan is good/bad and how you think it will affect the student's progress

- Chances are, you aim to communicate with someone in some way. If you choose to ask the psychologist how he's doing you are seeking additional information that will not only inform your personal awareness, but will also put you on the same page as the psychologist about what is going on with him. Sharing the news about the student's private tutoring classes does not immediately change your personal awareness but it does change others' and helps your team mates cultivate a shared understanding of what is going on with the student. Further discussion with your team mates will help to unearth any other unknowns that could affect the IEP for the student.

**Slide 13:**

**Note to instructor:** *This slide includes animation. While the slide is in presentation mode click the mouse or arrow keys to activate and advance the animation.*

**Instructor/Facilitator Talking Points:**

- **Ask:** Based on our discussion up to this point, what do you think are the reasons that situation monitoring is so important? In other words, what benefits do you think situation monitoring and the resulting situation awareness has for the team?
- There are numerous benefits to engaging in the situation monitoring process. For instance, monitoring helps teams anticipate and respond to change and adjust strategies when necessary. It also helps teams to avoid and fix issues. Having a shared understanding as a result of the process can also help to accommodate students and improve student and staff welfare.
- In a sense, the situation monitoring process is the cornerstone of problem solving.

**Slide 14:**

**Instructor/Facilitator Talking Points:**

- Situation monitoring may seem straightforward, but there are some barriers in gaining and maintaining situation awareness on-the-job.

**Note to instructor:** *animation begins. Click the mouse or keyboard arrow key to advance the animation.*

- For example a chaotic classroom or noisy environment may make it more difficult to systematically scan the environment.
- Additionally, sickness, stress, a burdensome workload, fatigue, and/or hunger can all detract from your ability to pay attention or process changes in your surroundings.
- **Ask:** What others barriers have you experienced that have inhibited you from being able to monitor and/or process what you are seeing?
- Even if you can overcome these barriers, it is easy to forget to do the things necessary to make sure others are also "in-the-loop" about what's going on
  - For example, when busy, it is easy to forget to share information, request information you may need, and to include all proper personnel and people necessary
  - For example, if a student-teacher conference is needed, all relevant administration should be contacted and included on communications, the student status. Also, the teacher should be in contact with the student's parent or guardian.

**Slide 15:**

**Note to Instructor:** *This may be a great time to pause your discussion or perhaps even leave off for another day. The next slide includes a review of the previous material to assist you with bringing continuity in discussion of the material if you choose to leave off and come back to the module on another day and time.*

**Slide 16:**

**Note to Instructor:** You may find that you do not need or want to conduct a review, particularly if you plan to complete the module all at one time. However, if you decide to conduct the module at different times, particularly if on different days, then the review will help to refresh everyone's memory about what they learned previously. It may also serve as a quick way to catch-up newcomers to the training session.

**ANSWERS:**

1. Situation monitoring, situation awareness, shared situation awareness
2. Continuous monitoring can help the team:
  - Accommodate students appropriately
  - Anticipate changes in needs and priorities
  - Adjust the team strategy accordingly
  - Respond to unanticipated conditions
  - Know when to redistribute workload
  - Avoid problems
  - Rectify mistakes
  - Develop an accurate shared understanding
  - Perform better, ensuring the welfare and safety of students and school staff
3. Barriers:
  - Situation Monitoring:
    - Illness
    - Stress
    - Workload
    - Fatigue
    - Hunger

**Ask:** How can you avoid some of the common barriers to situation monitoring and awareness?

**Slide 17:**

**Instructor/Facilitator Talking Points:**

- In order to gain knowledge relevant to our team, we need to observe the situation carefully in order to seek information that can impact the team process.
- Monitoring can be an overwhelming task as there are a great number of things one can attend to
- To help narrow your focus to issues related to your team and its progress we recommend the STEP strategy
- STEP is a mnemonic that will help you direct your monitoring activities and relate your observations back to the team by focusing your observations into four categories relevant to teamwork:
  - Self
  - Team Members
  - Environment
  - Progress of the team
- Monitoring your own ability to contribute to the team is critical. You are an integral part of the team and you must take care to be aware of your ability and willingness to do so and what you can and should share with your fellow team members.
- You must also consider your team members, a process called "cross-monitoring". Cross-monitoring will not only allow you to offer needed support to your team members but it can also help you to determine whether you could be impacted by your team members in some way.
- Importantly, teams operate in a broader context and many things going on around us in the environment can greatly affect our teams' abilities to get the job done. You should periodically stop to consider what is going on around you and how these things may impact your team and what you

should do about them. Much of what we observe in the environment won't matter at all, but it's important to be aware that you and your team are subject to disturbances stemming from what's going on around you.

- Lastly, you should consider your team's progress and the likelihood your team will be able to accomplish its purpose if you continue on the current path. The ultimate purpose of monitoring is to use the information you glean to help you ensure the team is able to make its goals. Using the knowledge you've gained by assessing yourself, your team members, and the environmental aspects that could impact your team you can brainstorm solutions to any potential progress barriers
- It is beyond this training to provide ready-made solutions to the problems your team can and will face. Instead, continually monitoring the situation and using STEP to relate your observations back to the team should prompt you to think about how to weather problems as they arise. You are highly encouraged to share all of your observations and concerns with your team mates in order to develop a shared situation awareness and draw on the power of your peers to find workable solutions and ensure you all know what needs to be done for the team to succeed.
- In order to explore how these positive outcomes can be achieved, we will now discuss each of the foci of STEP in greater detail and how they relate to the team

#### **Slide 18:**

##### **Instructor/Facilitator Talking Points:**

The S in STEP stands for 'Self'. Monitoring of the self is focused on YOU and your ability to contribute to the team. There are four major topics you should be concerned when monitoring your relationship with the team. The first is what you've done so far. The second is to assess what you need to do still. The third is to consider what you can do for the team. Last, is to figure out what you would recommend to the team based on everything you know about your current status.

- When asking yourself, "What have I done to contribute to the team?" you'll want to consider all the tangible and intangible resources you have provided and the progress you have made in your role responsibilities to the team. For instance, what tasks or activities have you completed in an effort to support the team so far? You may also want to consider whether the personal and professional experiences you bring to the team are suitable to your role on the team. If not, perhaps it's time to devise a plan for making sure the role can be adequately fulfilled, either by learning what you need to or recommending someone else with a more compatible history fills the role.
- Once you have assessed what you've done so far, you'll next want to ask yourself, "What do I need to do?". The purpose of asking yourself this question is to identify your unfulfilled responsibilities to the team and remaining task work so that you can begin a plan of attack for fulfilling them. In doing so you'll want to consider what you need in order to fulfill your responsibilities and estimate a timeline for getting them done.
- After clarifying what you have left to do you'll want to realistically ask yourself whether you are capable of doing the task work you have left to do in the timeline it needs to be completed. As you know, there are number of things that can prevent you from being able to take care of your responsibilities to the team not the least of which include your workload and time demands, mental and physical health, the congruence between your team role and your experience. You may also want to realistically assess whether you are committed to the team or identify with its purpose.
- Once you have taken a full self-assessment of your contributions to the team you will want to seriously consider what you would recommend to the team. For instance, if you find that you are in great shape and have managed your responsibilities well you might want to give this as an update. You may even offer additional assistance to your team mates in this case, if you are able to do so. Alternatively, if you are finding that you are struggling or behind you should share that with your

teammates and communicate what resources, such as additional time or help, you think you need in order to get done what needs doing.

You do not need to feel you must share personal information about yourself with your teammates if you are not comfortable doing so. For instance, if you find you have a medical condition that you do not want to make public it's not necessary to tell this to your team. However, it is strongly recommended that you communicate to your team as soon as possible that you are behind or need assistance so that workload can be redistributed. Obviously, it does no one any favors to wait until the last minute to share information you knew for some time. It is better for everyone to get on the same page and brainstorm ways to adapt to the changing needs.

#### **Slide 19:**

##### **Instructor/Facilitator Talking Points:**

- The next step is to cross-monitor your colleagues. Cross-monitoring is the process of monitoring the actions of other team members with the purpose of sharing the workload and reducing or avoiding errors.
- There are 4 questions to ask yourself when cross-monitoring your colleagues:
  - 1. What verbal and non-verbal cues are my teammates displaying?
  - 2. Why might they be displaying these cues?
  - 3. How might this underlying cause affect the team?
  - 4. What should I do about this?
- The first question, what cues are my teammates displaying, involves picking up on signals such as teammates looking confused, stressed, or angry; teammates who seem to be sick; teammates who seem to be spaced out; teammates who are yawning
- The second question, why are my teammates displaying these cues, requires you to make a judgment about the underlying cause of these cues. For example, you may notice that Jim looks stressed and make the judgment that his workload is very high. Alternatively, you may notice that Karen looks confused and assume that she does not understand her tasking.
- Answering the second question helps to lead into the third question, which is how might the underlying cause affect the team? The underlying cause could not affect the team at all (for example, if Chris sneezed one time, and you judge that he is not sick but just caught a whiff of dust). Alternatively, the underlying cause can have major implications for the team. For instance, perhaps Karen is confused and does not understand her tasking. This may prevent or slow her progress on the assigned task.
- Finally, the fourth question is “what should I do about this?”. Depending on the circumstances, you may choose to ignore the signals, as they are benign and meaningless (e.g., in the case of Chris sneezing one time). You may instead choose to tell someone and/or the team (e.g., “I noticed that Jim looks very stressed. Perhaps his workload is too high for him to complete this task by the end of the day.”). Finally, you may choose to help the person yourself. In the example of Jim, you may choose to engage in mutual support, and ask Jim if there is any work you can take off his plate.
- Additional questions to consider when cross-monitoring include:
  - Are teammates working within their competence and training?
  - Are team mates aware of their role on the team?
  - Are teammates engaged?
- When monitoring teammates, consider the following:
  - Mental state/emotions
  - Workload
  - Interest in project team, motivation to contribute
  - Reliability of members

- Interpersonal dynamics
  - Expertise/background
  - Physical health
  - Home/personal life
  - Resources – what team members have available to them
  - Previous performance
  - Do they seem confused about what’s going
  - Are they struggling to contribute
  - Non-verbal cues (body language, etc.)
  - Off-hand verbal cues
- It is important to recognize and maintain an awareness of your teammates’ functioning in order to ensure safety and team progress. If you notice something peculiar, respond and adjust the team strategy accordingly. Consider reaching out to them or offering assistance (Instructor: see module 4 on Mutual Support for more information about offering assistance). Use your assessments to determine when to redistribute workload and initiate communication with your team members in order to avoid problems.

**Slide 20:**

**Note to instructor:** *Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.*

**Instructor/Facilitator Talking Points:**

- This clip from *Finding Nemo* demonstrates cross-monitoring in action
- After the clip ends **ask:** How can you use cross-monitoring in your SCHOOL TEAMS (E.G., CURRICULUM DEVELOPMENT, IEP, ETC)? What would cross-monitoring look like to you?

**Slide 21:**

**Instructor/Facilitator Talking Points:**

- While team members should be aware of the status of the team and its members, teams should also be aware of the environment in which they work. Environmental factors can greatly influence the ability of the team to meet its objectives. There are four questions you may ask yourself in order to assess how the environment may affect the team are: 1) What are the current circumstances surrounding our team? 2) What tools and materials are available or unavailable? 3) How might the general circumstances and available resources affect the team? And 4) What can and should we do to respond to these factors?
- There are many circumstances that can affect a team. The trick is trying to identify those that might affect YOUR team.
  - Some circumstances could include national, state, county or even school-wide policy changes. Policy changes can affect the team’s game plan, requiring the team to alter its course.
  - Other circumstances may be based in human resources. For instance, if one team member is out on maternity or paternity leave the team’s ability to make progress could be affected.
- Material resources can also affect the team so taking an account of the tools and other materials available to your team is recommended. For instance, if you are on an IEP team you will probably



need a private place to meet. You may also need materials such as a computer, conference table, and chairs. You should consider what is needed and whether those resources are available to you.

- Of course, you'll want to assess how your team might be affected by the environmental conditions in which it is operating. Not everything will be relevant to your team. For example, IEP teams will be highly affected by what is happening with individual students and would need to be savvy about what is going on with individuals. School curriculum development teams, on the other hand, are less influenced by the needs of individuals but would need to consider what is happening globally within the school. The point is that relevant environmental conditions will vary depending on the team's objective. You'll want to consider what things could potentially affect YOUR team and then assess whether these things could slow down the team or possibly prevent your progress. For instance, if you need a certain conference room on a given day in order to meet you'd want to make sure that room is available or whether you need to reschedule your meeting for an alternative time when the space you require is available. Brainstorming the probable outcomes will help you to devise a team plan for adapting to changing conditions.

#### **Slide 22:**

##### **Instructor/Facilitator Talking Points:**

- The final step – “Progress Towards Goals” – focuses on ensuring that the team will be able to complete their goals on time. By monitoring progress toward the team's established and agreed-upon goals, team members will be able to alert the team when strategies or the plan of care may need to be reconsidered or revised or when additional resources are needed.
- Now we see how STEP works as an actual step process since this step relies on the status of all the others.
  - First, you must confirm that you understand the goals of the team, how much progress has been made and what items remain to be completed, and that you have a plan in place to complete your goals.
  - Next, you should use the status information from the other three steps (self, team members, and the environment) to assess how the plan might be affected. Think about whether or not the team is on track to meet its goals.
  - Then, if the team is not on track to complete its goals, think about what course of action you would recommend to the team.
- When assessing goal progress, team members need to consider the following:
  - Is the team goal reasonable and attainable? Have recent situational changes outdated the goal?
  - What tasks/actions still need to be completed in order to meet the team's goal(s)?
  - Has anything in the environment or team members changed that affects goal strategy? Do we need a change of course in order to obtain the team's goal(s)?

#### **Slide 23:**

**Note to instructor:** Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor Tip:** Pause the video at minute 1:01:00 and ask the class how many changes they observed. Consider replaying the video once more before showing the solutions to give the group another chance to observe additional changes. Remind them to use the STEP mnemonic to focus on the Students, Team

member (i.e., the teacher), the Environment, and Progress Towards Goals (i.e., identifying the student who cheated).

**Instructor/Facilitator Talking Points:**

- This is another change blindness video similar to the first video in this module. While you are watching this video practice using the STEP mnemonic to scan the environment. While watching this video consider the teacher to be your team mate and your goal to be figuring out who cheated on the test.
- **ASK:** [After the video has played through the “solution”]
  - So, how did you do? How many changes did you notice?
  - What was difficult about this exercise?
  - What did you monitor about yourself while the video was playing? Your ‘team mate’ (i.e., the ‘teacher’)? The Environment? Goal progress?
- One important fact about monitoring is that it’s not always easy, particularly when a lot is going on and there are many ‘moving parts’ in the situation. The best you can do is to periodically and continuously ‘check in’, assessing what you can in order to advance and maintain your awareness.

**Slide 24:**

**Instructor Note:** *The purpose here is to allow the participants an opportunity to consider what they can do in their own schools to engage more easily in effective situation monitoring. People are more likely to change their behavior when they buy-into the fact that it is important to do so. Allowing them to create processes that fit within the culture and policies of their particular school environment helps to create buy-in and longer lasting effects.*

**Suggestions for implementation ideas:**

- Reminder tools (e.g., bracelets, posters, PA announcements) to serve as reminders about what and how to monitor
- Scheduled ‘check-ins’ with others to take the temperature of the team and brainstorm solutions to possible problems
- *Possible answers to these questions include:*

What makes it difficult to maintain situation awareness? *Stress, environment, hunger, fatigue, workload, illness*

What can we do at our school to help each other remember to continually scan the environment? *STEP*

What policies and procedures would you recommend to the administration to help facilitate situation monitoring?

How can we remember to share what we observe?

What practices can we implement during and between meetings to ensure everyone is updated and in-the-loop?

**Slide 25:**

References

## **Mutual Support Module**

**Slide 1:**

**Instructor/Facilitator Talking Points:**

We will now discuss mutual support. Mutual support is an important team competency that can allow a team to be more effective. All team members can, and should, engage in mutual support.

## Slide 2:

Contributors

## Slide 3:

**Note to instructor:** *The purpose of this slide is to engage the participants, so allow them to respond to the vignette and share their own teamwork failure/success stories. This vignette has been adapted from an interview with a real teacher who talked about experiencing a similar situation. Participants may be better drawn in if they are aware of this fact. If you choose to give time to sharing of stories then be cognizant of the time you have to get through all the material. Don't allow the conversation to go on too long but try to get everyone engaged.*

### Instructor/Facilitator Talking Points:

- **Read:**
  - It was Field Day at Cherry Valley Elementary School. Unexpectedly, the P.E. teacher coordinating the event woke up with an awful sinus infection and was forced to call in sick. The principal was faced with a hard choice: cancel Field Day or not? Rather than disappoint the students, she decided to take control of the event. With the help of many committed teachers, the principal began executing the P.E. teacher's Field Day plans. In the end, the day was a great success.
- **ASK:**
  - Does this situation resonate with you?
  - Would anyone like to share their experiences with mutual support? It may be that you helped someone, that you were helped by someone, or a time when you witnessed someone offering support to someone.
  - How was the support helpful?

## Slide 4:

### Instructor/Facilitator Talking Points:

- This module will help you to:
  - Understand the importance of mutual support
  - Know mutual support's components
  - Provide support constructively
  - Use the two-challenge rule to advocate for yourself and your teammates
  - Understand the appropriateness and use of the DESC template (**D**escribe what you observed, **E**xplain how your observations differed from your expectations, **S**upport your expectations with rationale, **C**ollaborate to define an action plan or solution)
  - Manage conflict effectively
- **Ask:** What do you think are the benefits of mutual support?
  - **Note:** *Ask this question before presenting the next slide. Present the next slide as a follow up to the question after everyone has exhausted their ideas.*

## Slide 5:

Now, we will discuss the benefits of mutual support in teamwork, learn how mutually supportive teams tend to function, and recognize when it might be useful to offer support to team members.

## Slide 6:

### Instructor/Facilitator Talking Points:

Mutual support contributes to important team outcomes. Teams who engage in mutual support:

- Are more effective
- Make fewer errors
- Help each other out
- Can correct their own issues
- Can reallocate tasks so work is completed effectively and efficiently
- Distribute and assign responsibilities appropriately
- Are more resilient

**Slide 7:**

**Instructor/Facilitator Talking Points:**

- Mutual support is the provision of task assistance, social support, and feedback to one or more team members, as needed. In other words, mutual support is back-up behavior that is intended to benefit the individual and, by extension, the greater good of the team. We will talk about the three aspects of MS during this module.
- This module will also help you to realize that feeling comfortable taking interpersonal risks with your team mates will help set the stage for better support. By interpersonal risks, we mean feeling safe to engage in behaviors such as speaking up, disagreeing with the group, and voicing concerns.

**Slide 8:**

**Facilitator/Instructor Talking Points:**

- Mutual support should be given when additional help would be beneficial to completing work. However, team members may not recognize that you may need help. If you are feeling overburdened, stressed, confused, or ill equipped to manage your responsibilities, you should seek support from fellow team members.
- Of course, in addition to receiving support, providing support is a critical part of helping team members to be more effective. The struggle, stress, or challenge could be due to a variety of factors, including that the member is impaired for some reason or perhaps inexperienced. If you notice a team member having any of these problems, do not wait to offer support or you may miss the opportunity to help. If they refuse your offer, be gracious and recognize that although they refused your offer now, there may be a need for your help in the future. Don't hesitate to offer support again.
- Consider offering support not only when you notice another teammate struggling but also at times when you have the resources to contribute more to the team without overburdening yourself. Team members may not necessarily be struggling themselves but work could be completed a little bit more efficiently if two sets of competent hands are tackling the job.

**Slide 9:**

**Instructor Tip:** *This is an excellent time to offer a break or stop completely for the day, depending on the time constraints of your session.*

**Instructor/Facilitator Talking Points:**

- In Part 2, we will be covering mutual support strategies that can be used within teams.

**Slide 10:**

**Instructor/Facilitator Talking Points:**

- Offering task assistance is one important component of providing support to team members; it is actively helping team members to manage their responsibilities to the team. It may be especially beneficial when one or more team members is encountering problems in accomplishing their individually assigned tasks.

- Examples of task assistance include:
  - Working with team members on their assignments
  - Rerouting some or all work to other members
  - Filling in for a team member, as needed
- All of these actions allow team members to function more effectively as individuals and as a team.
- **ASK:** Can you describe a time when you offered or were offered task assistance? How did that help you or the team?

**Slide 11:**

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**Instructor/Facilitator Talking Points:**

- This video provides an illustration of the power and importance of task assistance.
- **DO:** Press play on the video.
- As this video demonstrates, offering support to teammates can lead to increased feelings of commitment to the team and to more effectively completing tasks.

**Slide 12:**

**Instructor/Facilitator Talking Points:**

- Before offering task assistance there are a few things you can do to make sure that you are not actually going to make matters worse.
  - First, be clear about how much available time you have and about what tasks you are able to assist with. For example, say, 'I see you are busy. I have 10 minutes until my class returns from lunch. I can walk your student to the office if you'd like.'
  - Second, consider the experience level of the person who is requesting or offering task assistance. If the person is offering to help, give him or her a task that you know he or she is capable of doing correctly. In turn, when offering help, let the person you are helping know what specific tasks you can take on, given your expertise and experience.
  - Finally, after the task is complete, be sure to close the loop. Let your teammate(s) know that you have finished the task and ask them to check that you did it correctly. It's safer to have someone check your work than assume you've done it correctly. This is particularly true when you are helping out on a task that is not within your typical domain of expertise or experience.
- The **National Association of School Psychologists** recommends that consistency, routine, and expectations be maintained as often as possible. Changing schedules, reducing workload, and redistributing tasks are activities that should be reserved for situations where such shifts and changes are absolutely necessary. This is because consistency and continuity create feelings of comfort and safety, which can strengthen a stressed team member and the entire team. Nonetheless, you could consider any one or several of these interventions listed in order to assist members of school teams when members are overburdened or stressed. Such interventions are akin to offering a soccer or hockey player a break off the field or ice for a moment so that the player can catch his or her breath. "Lending a hand" can go a long way in helping a team feel cohesive. Cohesion is the feeling in the team that the team members that they are all committed to the work and to each other. This can facilitate high productivity.

### Slide 13:

#### Instructor/Facilitator Talking Points:

- Providing social support to your teammates is another important component of mutual support. Being a friend in addition to a teammate is important and can go a long way in increasing team commitment and reducing stress and burnout among your peers.
- Social support refers to activities that allow team members to remain committed to the team, especially at times of emotional turmoil (e.g., when conflict arises). Social support can take a number of forms that can include:
  - Being an ally to them when they need someone to help advocate for them or their ideas.
  - Reassuring their worth and value to the team. Tell them how much you and the other team members appreciate them.
  - Listening to their problems.
  - Offering guidance – if they ask for it. It is important to not give advice just to give advice. Sometime people are not in the correct state to properly receive advice. Be sure to read your teammate carefully and only offer guidance if they seem to want it. Otherwise, just partake in other forms of social support.
    - **ASK:**
      - Now take a moment to think about an instance when someone you know successfully provided you with social support. What actions did they take? How did it make you feel?

### Slide 14:

#### Facilitator/Instructor Notes:

- It is important for you to keep the social support you extend helpful. Social support can help relieve the symptoms of burnout, such as emotional exhaustion. However, if done incorrectly, it may make matters worse.
- We often find ourselves being an ear to listen or want someone else to sympathize with our troubles. Although social support is often offered in the form of co-rumination, or venting, this act can actually increase emotional exhaustion because we continue to reflect on the problem for longer than we would without someone lending an ear. Next time you find yourself venting to someone or listening to someone vent, try to move the conversation on to more productive topics, like how to deal with the problem rather than continuing to mull it over.
- People want to feel that their thoughts and contributions are valued by the team. Simple encouragement of shy or nervous teammates to contribute to the team dialogue can go a long way in making them feel that they are an asset to the team. You can provide encouragement by directly asking them what they think and actively listening to their ideas.
- Sometimes new ideas need support in order to gain traction in the team. Verbalizing your agreement with an idea can go a long way in getting a stubborn team member to get on board. It may not always work, but there are power in numbers. Alternatively, you may find that your teammates need an advocate not just for their ideas but quite possibly on a personal level, too. Let's now consider how we can advocate for each others' interests.

### Slide 15:

#### Instructor/Facilitator Talking Points:

- One strategy for speaking up is the two-challenge rule. Though originally developed by human factor experts to help airline captains prevent disasters, you can use this rule to advocate for yourself or team members.

- The overall premise of the Two-Challenge Rule, is the notion that you have to voice your concern at least twice for it to be heard. These two attempts can either come from the same person or from two different team members. The first challenge should be in the form of a question. For example, ask “Can we talk about doing it another way?” Then, if other teammates are unresponsive, the second challenge is used to provide additional support for the initial concern. You must restate the concern in order to ensure that it has been understood and acknowledged.
- When making strong assertions, always remember to show respect. Use non-threatening language and keep an eye on your temper. You are more likely to get acknowledged if you remain calm yet confident.

**Slide 16:**

**Instructor/Facilitator Talking Points:**

- Another way in which you can support your team members is by providing feedback, which will help the other person develop the knowledge, skills, and attitudes they need in order to effectively contribute to the team.
- Feedback, which is information about current performance, can come in many different forms. For instance:
  - Feedback can be positive, which reinforces good behaviors by telling people when and how they have done a good job. By knowing what is desirable, they are likely to repeat the behaviors again in the future.
  - Feedback can be “negative”. Don’t confuse negative feedback with criticism – negative feedback is simply information about a person’s weaknesses. In a minute we will discuss how to keep such feedback respectful and constructive. Negative feedback provides people with valuable information about their shortcomings so that they can target specific areas or behaviors to improve.
  - Feedback can include solutions for overcoming limitations, thus providing team members with suggestions for becoming a stronger team member.
  - Feedback can also include warnings about what will happen if current behavior continues without change. This can be warning of negative consequences of undesirable behavior or possibly even hints at rewards for good behavior.
- Remember that the intent is to develop and it can be very easy for team members to feel defensive about their work. In a minute we will talk about how to keep feedback constructive and respectful.
- As an example, if Sharon wrote an email summarizing a meeting for members who were unable to attend and did not provide enough detail for others to understand what was discussed during the meeting, a team member may want to provide Sharon with feedback on her email. For instance, he/she should thank Sharon for writing the email, which is what she did well, to inform everyone about the meeting details. Secondly, the person providing feedback should indicate that she did not provide enough detail for other team members to understand the intention or proceedings of the meeting and that in the future, she could consult someone who took detailed meeting notes before sending the email to the group. Lastly, the person providing feedback could project that if more emails without meeting details are sent, absent team members will be out of the loop on what is happening, may not pitch in to help with necessary tasks, and may avoid meetings in the future due to the lack of detail.

**Slide 17:**

**Instructor/Facilitator Script:**

- Your objective in giving feedback is to provide guidance by supplying information in a useful manner, either to support effective behavior, or to guide someone back on track toward successful

performance. Whatever the purpose – feedback should always be constructive. Constructive feedback is used to build people up. It is not the same as criticism, which is used to break people down. Constructive feedback lets the other person know that you are on their side and have their interests, as well as the team's, at heart.

- Remember the **golden rule** when giving feedback: If you can't think of a constructive purpose for your feedback then it shouldn't be given at all

#### **Slide 18:**

##### **Instructor/Facilitator Talking Points:**

- Feedback is the facet of team communication in which learning occurs. Providing feedback is a supportive act. Team members benefit from constructive feedback. Building feedback into the culture of a team can go a long way in supporting the team and its work. The trick is learning how to give feedback constructively so that it has value.
  1. Be timely in feedback delivery
    - If you wait too long, facts are forgotten and the feedback loses its 'punch.' Feedback is most effective when the behavior being discussed is still fresh in the mind of the receiver.
    - Be specific
      - Feedback should relate to a specific situation or task. The person receiving feedback will be better able to correct or modify performance if specific actions are mentioned during feedback.
      - For example, "You should offer more examples of the concepts you are teaching," is more specific than, "Your teaching needs work."
  2. Focus on description rather than judgment
    - Describing behavior is a way of reporting what has occurred, while judging behavior is an evaluation of what has occurred in terms of "right" or "wrong", or "good" or "bad". By avoiding evaluative language, you reduce the need for the individual to respond defensively.
    - For example, "You demonstrate a high degree of confidence when you answer parents' questions about student performance," rather than, "Your communication skills are good."
  3. Focus on observation rather than inference
    - Observations refer to what you can see or hear about an individual's behavior, while inferences refer to the assumptions and interpretations you make from what you see or hear. Focus on what the person did and your reaction.
    - For example, "When you gave the student the Financial Aid form, you tossed it across the counter," rather than describe what you assume to be the person's motivation, "I suppose you give all forms out that way!"
  4. Focus on behavior rather than personal traits
    - Refer to what an individual does rather than on what you imagine she or he is. To focus on behavior, use adverbs, which describe action, rather than adjectives, which describe qualities.
    - For example, "You talked considerably during the staff meeting, which prevented me from getting to some of the main points," rather than, "You talk too much."
  5. Provide a balance of positive and negative feedback
    - If you consistently give only positive or negative feedback, people will distrust the feedback and it will become useless.
  6. Be aware of feedback overload



- Select two or three important points you want to make and offer feedback about those points. If you overload an individual with feedback, she or he may become confused about what needs to be improved or changed
- For example, “The time it takes you to enter grades is within the expected range. The number of errors you are currently making while assigning grades is higher than expected.”
- Giving feedback constructively benefits everyone. You, as a colleague, use the ongoing exchange of information as a way of getting to know your team member and providing them with valuable guidance in their work. Your team members receive information that makes his or her job go easier and improves their contributions to the team. The team gains improved productivity by better taskwork and teamwork.

#### Slide 19:

##### Instructor/Facilitator Talking Points:

- To give great feedback, you may use the DESC script. DESC stands for: Describe, Explain, Support, and Collaborate. While DESC was originally used as a template to help with resolving conflict, it can also be used to guide a feedback discussion.
  1. Begin by **describing** what you observed. Remember to be focus on specific, strictly observable behaviors. Doing so will help team members feel less defensive while they receive feedback. It can also provide them with tangible examples of what they have done well and/or where they need improvement.
  2. Next, **explain** how your observations differed from your expectations. Explaining the mismatch between expectations and the observed behaviors can open the conversation between team members to discuss possible misunderstandings in the task description.
  3. **Support** your expectations with rationale. Describing why feedback is being provided. Perhaps the task at hand is important to meeting the team’s deadlines or perhaps the quality of the work needs to be improved so that it can be shown at the next administrative meeting to argue for more project funding. Regardless of the purpose, the rationale for the expectations should be clear and related to helping the team reach its goals.
  4. **Collaborate** to define an action plan or solution. Collaborating to define an action plan allows the team members, those providing and receiving feedback, to work closely together to identify plans to make a solution and actionable plan for meeting team goals in a reasonable way.

#### Slide 20:

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##### Instructor/Facilitator Notes:

- Before we begin the video, write down an instance when you gave or received feedback from a team member. This video helps to walk you through the feedback process. Providing feedback is not an easy thing to do, as it requires being open and honest with your colleagues and accepting potential criticism. You’ll see how the DESC script is carried out in the video. Although this is not within a school context, this can provide you with an example of how great feedback can be given

and received. The manager expresses what she observes, what she expects, the reasons she expected these outcomes, and discussions to resolve the problem.

- In this video, the manager did each of the following:
  1. What I expected
  2. What I observed
  3. Rational for behavior that was expected
  4. Collaborate to re-define performance expectations (What should we expect in the future?)
  5. Using the instances written down, have participants in training provide a few personal examples of times they have received or given bad feedback. Remind participants that the purpose of the discussion is to brainstorm ways in which receiving or giving the feedback could have been improved by using the DESC method. Allow for discussion for approximately 5-10 minutes to limit time spent on this exercise.
  6. Pair together with partners. Using the feedback scenario you wrote down, practice giving feedback to your partner based on this scenario. Remember to keep feedback based on specific behaviors rather than sweeping generalizations about others' personalities.
  7. Come together as group, discuss. Did your partner's feedback surprise you? Upset you? How can you use DESC on-the-job?

**Slide 21:**

**Instructor/Facilitator Talking Points:**

- Conflict is an inevitable part of teamwork. Most, if not all, teams experience some sort of conflict at some point in time but it is okay and completely normal. The important thing is to learn how to handle conflict as it arises so it does not undermine team performance
- Everyone wants their team to be strong and the following part of this module will help ensure that your team has all the tools to be the strongest!

**Slide 22:**

**Think-Pair-Share:**

- Individually, think about the following questions:
  - What comes to mind when you think of conflict?
  - How would you define it?
  - How has conflict affected your work with others?
  - How did you handle it?
- Break into pairs to discuss their answers to the above questions.
- After 10 minutes or so, have the group come back together and ask people to share some of their answers to each question.

**Instructor/Facilitator Talking Points:**

- Conflict is the tension and disagreements that arise from team member differences. They can delay team productivity and goal achievement.
- Conflict has three major sources.
  - Task-based: differences in opinions about a particular task, such as whether it is necessary or not.
  - Process-based: disagreements over the team's approach to a task, its methods, and the team process
  - Relationship-based: interpersonal differences that create annoyance or tension

**Slide 23:**

**Instructor/Facilitator Talking Points:**

- Not all conflict outcomes are equal. Some outcomes are less than ideal.
  - **Compromising:** When two parties “compromise” they are often settling for less than they could. Though this outcome might be the only way some conflicts will be resolved, it is possible to do better.
  - **Avoidance:** When parties in conflict avoid or sidestep issues, the root causes continue to fester. Over time, the conflict can worsen its impact on performance, possibly doing irreparable damage to the team.
  - **Accommodation:** Sometimes certain individuals prefer to accommodate a more dominate team member’s demands. In this case, the focus is on preserving the relationship, usually “in the interest of the team”. The problem is that it’s not really in the team’s interest for conflicts to be resolved with accommodation because one party usually ends up with an unfair deal. Over time, these injustices can build and continue to ruin the team.
- When in conflict, teams should try to attain win-win outcomes. In these cases, the focus is on finding solutions to the conflict that are mutually satisfying to all parties. These outcomes are ideal because it allows the team to meet goals without compromising member relationships. When everyone is happy with the outcome the team can move on.

#### Slide 24:

##### Instructor/Facilitator Talking Points:

- We’ve seen bad outcomes and discussed what could’ve happened differently. But, how someone goes about creating a win-win outcome instead of a bad one can be tricky. Or, I guess I should say “used to be tricky” because using the DESC script can make it easier to handle! That’s right, the DESC script isn’t just for feedback, you can use it to help manage conflict as well!
- DESC Script:
- **D**escribe your observations
  - **E**xplain differences from expectations
  - **S**upport expectations with rationale
  - **C**ollaborate to find a resolution
- "I" statements are crucial for solving a conflict as objectively as possible. "I" statements make your feelings and motives clear and can help the other person see your side of the story without feeling accused or persecuted; "You" statements make the other party feel like he or she is on the chopping block and will make him or her feel much more defensive. "I feel like I've been picking up the majority of the work on the project," is more effective than "You have been making me do all of the work on this project."
  - **See it from the other person's perspective.** If you really want to solve the situation, then you have to understand where the other person is coming from. Be emotionally aware and listen to what the person is feeling *and* saying; often times, the person may try to act like it's really not a big deal, but the look on his face will show you that the person is deeply angry or hurt. Get a sense of the things that are really troubling the person, what you've done to contribute to these feelings, and the ways that you have both contributed to the situation. If you're only focused on getting your way at all costs, then you'll never be able to find a compromise that pleases you both.
  - **Figure out the real source of the tension.** Work together to figure out what is really troubling you both. You may think you're arguing because you feel like you don't spend enough time together, but the real reason may be that you both fear that the passion is gone from your relationship; you may be arguing with your co-worker because you feel that he has given you too much of the workload, but the real reason may be that you feel that he or she has received too much praise for his work, while you have been overlooked. You can only find a resolution once you agree on this point.

- **Focus on the future instead of dwelling on the past.** Sure, discussing some aspects of the past can help you pick up on certain patterns of behavior and can make you see how both of you have wronged each other or acted inappropriately, but if you dwell on the past, both people will only feel worse. Instead, you should focus on what's ahead of you, and how you can work together to *avoid* the problems that have occurred in the past. To do that, you'll have to change what you're both doing, because it's not working.

**Slide 25:**

**SAY:** If experiencing conflict with your teammates – CUS! Yes, you heard correctly. But, this isn't what you think. CUS is a useful tool to remember when you want to inappropriately cuss, but know that it would only worsen the situation. Instead,

- State your concern.
  - Then state why you are uncomfortable.
  - Finally, provide a potential solution to the issue and ask your teammate for their suggestions.
- You may also want to CUS with DESC to share your perspective.

**Slide 26:**

**Note to instructor:** *Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application.* **Note about fair use:** *This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.*

**Instructor/Facilitator Talking Points:**

- As we watch the following clip consider the following questions:
  - What type of conflict is being shown here?
  - How could the woman have handled the situation differently?
  - How could she have used the DESC script and CUS to articulate her grievances?

**Slide 27:**

**Instructor/Facilitator Notes:**

- Individually: (3 minutes to take quick notes)
  - What type of conflict do you think was demonstrated in the previous video?
  - How would you resolve this conflict using the two-challenge rule, the CUS strategy, and the DESC script?
- Divide the class into groups of 2-3.
- With your group:
  - Decide what type of conflict is most likely demonstrated in the video
  - Resolve this conflict using the two-challenge rule, the CUS strategy, and the DESC script. Also, given what you know about these 3 strategies, decide which of the 3 would be the *best* way to resolve this conflict. You will have 5 minutes.
- Reconvene the class.
- Have groups explain what type of conflict they think it is and why.
- Have some of the groups share their scripts.

**Slide 28:**

**Note to instructor:** *It is helpful if everyone is provided a handout with the full scenario written down. It will enable them to follow along as you read the scenario and will serve as a good reference while they are doing the think-pair-share activity.*

**Instructor/Facilitator Talking Points:**

- Now that we've reviewed some things on how to provide mutual support to your teammates, let's have some fun and practice the strategies we reviewed.
- **Read:** Imagine at your school that staff have undergone thorough training to implement a Response-to-Intervention model. A newly formed response-to-intervention team has been appointed that includes three general education teachers, principal, school psychologist, and reading specialist. All of the team members were appointed, and no one feels that they have the time to commit to this new endeavor. In addition, they do not believe that the staff has the time or resources to engage in this process.

**Slide 29:**

**Instructor/Facilitator Notes:**

- Individually make a few notes about:
  1. What barriers are present in the situation presented in the previous slide and on your handout?
  2. What other barriers to mutual support might you face in your own school?
  3. How could task assistance, social support, and feedback be leverage to alleviate the struggles faced by the professional in the scenario?
- Now, break up into small groups and answer the following questions:
  1. What barriers are present in the situation presented in the previous slide and on your handout?
  2. What other barriers to mutual support might you face in your own school?
  3. How could task assistance, social support, and feedback be leverage to alleviate the struggles faced by the professional in the scenario?
- After a while, bring the group back together to talk about their ideas.

**Note: Some solutions may be:**

- Facilitate schedule changes to help members contribute to the team
- Replace uninspired members with individuals motivated to contribute
- Redistribute school resources so the team has a few additional resources to draw on

**Slide 30:**

**Instructor/Facilitator Notes:**

- *The purpose of this activity is to begin discussions about how to make mutual support a part of the culture in your own school teams.*
- **Do:** Assign someone the job of secretary. This person will record the ideas coming from the following discussion so that the team(s) can have access to a record.
- **Ask:** What does our team(s) do well with regards to mutual support?
  - **Do:** Write down all the answers team members have on a poster or chalk board that everyone can see. Have the secretary record responses on a sheet of paper.
  - **Note:** *The purpose of starting positive is to encourage engagement.*
- **Ask:** What doesn't our team(s) do well with regards to mutual support?
  - **Do:** Write down all the answers team members have on a poster or chalk board that everyone can see. Have the secretary record responses on a sheet of paper.
  - **Note:** *The purpose of this discussion is to begin to identify weak areas of the school or team. Some teams or schools will have different strengths and weaknesses, so it is necessary to*

*isolate what those are in each team or school. By asking the staff themselves to identify weaknesses you are creating buy-in because they know it is a genuine problem that they would like to correct.*

- **Ask:** Of these weaknesses, which ones would we most like to fix?
  - **Do:** Record the order of priority on a poster or chalk board that everyone can see. Have the secretary record responses on a sheet of paper.
  - **Note:** *The purpose of identifying priority is to begin to whittle down 1-2 problems to tackle first. Trying to do too much at once is setting the team up for failure but by coming to agreement on priority items to tackle first, the team can fully commit to improving these items. Later, when the team feels like they have addressed priority items, they can revisit the secretary's notes and focus on new areas.*
- **Ask:** What can we do to improve each of these problems?
  - **Do:** Record the strategies on a poster or chalk board that everyone can see. Have the secretary record responses on a sheet of paper.
  - **Note:** *Make sure the team is strategizing realistic solutions that they can actually implement.*
- **Ask:** How can we implement these strategies and make them sustainable?
  - **Note:** *The purpose here is to talk about ways to make the plan a reality. It is one thing to talk about changes, but it is a whole other to make them. By narrowing down 1-2 areas to target first, the team is setting itself up for success and by creating a plan to improve, they are one step closer.*
- **Ask:** How will we know whether we have made progress?
  - **Do:** Record the strategies on a poster or chalk board that everyone can see. Have the secretary record responses on a sheet of paper.
  - **Note:** *By identifying measures of success you will be able to know whether the team has improved or whether additional work is needed.*

### Slide 31:

References

### Slide 32:

**Bonus Slide. A good example of Constructive Feedback that can be turned into a discussion activity.**

**Instructor/Facilitator Talking Points:**

- We will now complete a brief feedback activity. While I am reading the scenario, think about what is good and/or bad in this scenario. How does what we have learned about feedback apply here?

**Read:** The 4<sup>th</sup> grade team met to discuss the upcoming semester's curriculum. Mr. Smith, a first-year teacher, provided the group with his ideas for a new math program. After the meeting, Mr. Green— a teacher who has been at the school for over 20 years and his mentor— approaches Mr. Smith privately, and tells him that he did a great job communicating his ideas for the new math program in a detailed manner. However, he explained, in the future, a hand-out may help people in understanding his vision.

**Ask:** What was done well in this situation?

- Mrs. Green approached Mr. Smith in private. She gave him timely feedback, was respectful, and provided both positive and negative feedback. Her feedback was specific and directed towards improvement.

### Slide 33:

**Bonus Example**

**Slide 34:**  
**Bonus Example**

**Slide 35:**  
**Bonus Example**

## Leadership Module

**Slide 1:**

**Instructor/Facilitator Talking Points:**

- Welcome back. In this module we will be covering leadership in schools. More specifically, we'll be covering the behaviors that enable effective leadership and how you can use them every day at your school.

**Slide 2:**

Contributors: Authors of Teach TEAMWORK are listed on this slide.

**Slide 3:**

**Note to instructor:** *The purpose of this slide is to engage the participants, so allow them to respond to the vignette and share their own teamwork failure/success stories. This vignette has been adapted from an interview with a real teacher who talked about experiencing a similar situation. Participants may be better drawn in if they are aware of this fact. If you choose to give time to sharing of stories then be cognizant of the time you have to get through all the material. Don't allow the conversation to go on too long but try to get everyone engaged.*

**Instructor/Facilitator Talking Points:**

- **Note to Instructor:** *Emphasize that the vignette comes from interviews with real teachers.*
- **Read:** the vignette
- This situation is an example of ineffective leadership.
- **Ask:**
  - Does this situation resonate with you?
  - Would anyone like to share their experiences with leadership?
  - How was your leadership successful/helpful?
- This module is designed to talk about the importance of leadership and how all team members can be effective leaders.

**Slide 4:**

**Instructor/Facilitator Talking Points:**

- The purpose of the current module is to help you understand the importance of leadership, recognize that *anyone* can be a leader, understand effective and ineffective leadership behaviors and utilize strategies to help you enact these behaviors.
- During this training, you will have the chance to draw upon your own experience as leader and your experiences being led by others. And, we will revisit some of the issues raised in the previous modules, which will help us here, too. As in the previous modules, there will be lecture portions, brief videos, and group activities that are all geared towards enhancing our shared understanding of leadership in schools.
- STEP= **S**elf, **T**eam members, **E**nvironment, **P**rogress towards goals

- SWIM= **S**tart **W**ith Intent and **M**eaning
- BIKE= **B**ring In **K**nowledge and **E**quipment
- RACE= **R**espect all viewpoints, **A**ddress questions and concerns, **C**onsider all perspectives, **E**ye contact with each team member

**Slide 5:**

In this first section of the module, we will learn about the elements in strong leadership, the effect of solid leadership on teams, and different kinds of leaders.

**Slide 6:**

**Instructor/Facilitator Talking Points:**

- Today we are going to learn about and talk together about leadership, distilling some of the most important elements of leadership in schools.
- First, let's do a warm-up activity. Take moment to think about someone you've known who you consider to be a good team leader in schools. Imagine that leader *[pause a few seconds]*. Please write down three things that you think makes this person a strong leader. Be sure to include specific behaviors that this leader exhibits that you think are effective.
- **Note to Instructor:** *Allow a few moments for participants to create their list.*
- **Ask:** *Would anybody like to share their list? [Allow a few volunteers to share if they wish].*

**Slide 7:**

**Instructor/Facilitator Talking Points:**

- Leadership is key to successful team performance. In fact, some have asserted that is the *most* critical factor. For example, teams with effective leadership demonstrate better outcomes such as:
  - Increased productivity,
  - Increased learning,
  - Employee job satisfaction, and
  - Better performance
- The aim of this module is to strengthen your leadership skills and enhance your professional experience in schools.

**Slide 8:**

**Instructor/Facilitator Talking Points:**

- Why are we **all** engaging in leadership training? When we think of leaders we often think of someone who is appointed or in charge. However, leadership is defined as carrying out necessary behaviors in order to help the team accomplish their goals. Therefore, anyone can be a leader. You yourself may be called upon to lead at some point. The overarching purpose of this module is to teach you about the specific behaviors that will empower you to be able to lead a team of your peers.

**Slide 9:**

**Instructor/Facilitator Talking Points:**

- Leadership can take on a variety of different forms including designated leadership and shared leadership. We are going to talk about the above types of leadership separately, so that you understand each of these concepts.

**Slide 10:**

**Instructor/Facilitator Talking Points:**



- Typically, we view teams as having one elected or designated leader who is responsible for important decisions and delegates tasks. The designated leader’s position as team leader is usually not ambiguous. Everyone knows who he or she is. The designated leader most often comes into the leadership position through a formal appointment by team members or other stakeholders.
- For example, President Obama is the formal leader of the country, with his immediate teams consisting of staff and cabinet.
- Perhaps you can name various leaders under the formally appointed principal in your school and identify some of the teams and the formally designated leaders of those teams.

**Slide 11:**

**Instructor/Facilitator Talking Points:**

- Another type of leadership is shared leadership. In shared leadership, leadership behaviors are demonstrated by more than one member at a time throughout the team lifecycle or performance. Team members “*lead one another toward the achievement of collective goals*”\*. As shared leadership is incredibly important for educational settings, we will be emphasizing a shared leadership approach throughout this module. In this way, even if you are not a formal leader of a team, you can realize this module’s importance for your work.
- When teams adopt a shared leadership style based on the situation and the team needs, the role of leader shifts among team members who possess the knowledge and skills most relevant to the current task and can take over leadership functions; however, anyone can demonstrate leadership behaviors (e.g., speaking up, initiating a debrief, requesting follow-up and status on the attainment of project goals). In this way, the team member(s) with the greatest expertise manage the team during the task at-hand. This is why it is important for all team members to have strong leadership skills, even if they are not the designated leader at the moment.
- For example: A Teacher may be the leader of an IEP team when the current team task is to design a curriculum for a special needs student. However, when the IEP team’s focus turns to establishing a mental health care regimen for the student, a Psychologist may adopt the role of team leader because of his or her expertise.
- It is important to bear in mind that the appropriateness of each of these types of leadership for your team depends on your team’s purpose and its members. There is no leadership type that works best across all situations and for all teams; therefore, sometimes shared leadership will be the best solution while in others a single designated leader may be better. You can also have both a designated leader *and* shared leadership on the same team.

**Note to instructor:** *An optional additional idea for an example includes a situation in which a team member initiates a debrief for team members who weren’t able to attend a meeting.*

**\*Note to instructor:** *Quote is from (Pearce, Manz, & Sims, 2009).*

**Slide 12:**

**Instructor/Facilitator Notes:**

1. *Divide the whole session into groups of three to four people (or a group size that is appropriate for the amount of people in the session).*
2. *Ask participants to conduct this think-small group-share-activity.*
3. *Finally, each group can share with the whole group.*

**Slide 13:**

**Instructor Tip:** *This is an excellent time to offer a break or stop completely for the day, depending on the time constraints of your session.*

**Instructor/Facilitator Talking Points:**

- In Part 2, we will be covering leadership strategies that can be used within teams. But first, let's review some concepts from Part 1.

**Slide 14:**

**Tip for Instructor:** Ask these questions to the group at large and after the correct answer to each question is given, write it down on a public medium (e.g., blackboard, whiteboard, easel notepad, poster, etc.) where they can be displayed for the remainder of the training.

**Instructor/Facilitator Talking Points:**

- **Question:** Can anyone define leadership for me?
  - **Answer:** carrying out necessary behaviors in order to help the team accomplish their goals.
- **Question:** What are the two main types of leadership?
  - **Answer:** Designated and Shared
- **Question:** Who can be a leader of a team or in a school?
  - **Answer:** Anyone

**Slide 15:**

**Note to instructor:** Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor/Facilitator Notes:**

- **Note to instructor:** Play video before engaging in talking points.
- This video exemplifies how shared leadership can emerge and lead to success. Marlin and Nemo, the two orange fish, were not formal leaders of this group of fish. Rather, they emerged as shared leaders and, along with their friend Dory, led all the fish to safety by encouraging them to work together.
- **Ask:** How was shared leadership effective in this situation?
  - **Note to instructor:** Allow participants to engage in discussion for about 2 minutes. Possible responses include that

**Slide 16:**

**Note to instructor:** Quicktime will need to be installed on the presentation computer in order for the video to play. While your computer is connected to the internet, navigate your web browser to <http://www.apple.com/quicktime/download/> and download the free software application. **Note about fair use:** This video is fair use under U.S. copyright law because it is noncommercial and transformative in nature, uses no more of the original than necessary, and has no negative effect on the market for the original work.

**Instructor/Facilitator Notes:**

- **Note to instructor:** Play video before engaging in talking points.
- Please take a moment to think about a time when you have seen colleagues in leadership positions engage in ineffective leadership behaviors. Without using names, can anyone give me an example?
  - **Note to instructor:** Allow participants about 2 minutes to share examples before putting up the next slide.

**Slide 17:**

**Instructor/Facilitator Talking Points:**

- Some ineffective leadership behaviors include acting unreliably or volatily- such as frequently changing one’s mind or having arbitrary expectations, treating team members inappropriately by being unwilling to listen to others or refusing to compromise, and mismanaging team progress by using passive behavior, mismanaging resources, micromanaging, and failing to delegate.
- The behaviors listed here are common, human behaviors. We have all used them and have all seen them used, regardless of the consequence for team contexts. One way to think about these behaviors is to acknowledge that while these behaviors are human, they can be destructive to a team. In a shared leadership context, if a team member or leader is demonstrating these behaviors, it is particularly easy to see how this negatively impacts teamwork and team progress towards goals. These are behaviors to avoid, particularly when one is in a leadership position.
- **Ask:** Since these are human behaviors, we would expect that everyone here has engaged in one or all of these behaviors at some time. I would like for each of you to see if there is a behavior that you would like to erase from your repertoire for the week. Which would it be? Our next goal is to develop some skills that would be helpful in generating more effective leadership behaviors.

**Slide 18:**

**Instructor/Facilitator Notes:**

- Please take a moment to think about a time when you have seen colleagues in leadership positions engage in effective leadership behaviors. Without using names, can anyone give me an example?
  - **Note to instructor:** Allow participants about 2 minutes to share examples before explaining this picture.
- This photo came from an article, which read, “Mr. Lynch is a model of service to others and their families, no matter their role in the school. Teacher, student, parent, custodian, bus driver, volunteer are all equal players at the Mitchell School. Mr. Lynch exudes patience, fairness, generosity and excellence...And the evidence of that mutual respect sits on Lynch’s desk, a little bag of biscotti, baked for him by a retired cafeteria worker who still drops off treats for her former boss.” Part of Mr. Lynch’s effectiveness and ability to inspire others came from his emphasis on viewing everyone as a team player who had an important role to play in leading school activities. In doing so, high-quality relationships were developed and everyone at the school benefited.

**Note to instructor:** To read more on this story, see

<http://www.tauntongazette.com/news/x372820917/Banner-day-Brian-Lynch-of-Mitchell-Elementary-School-in-Bridgewater-named-Massachusetts-Principal-of-the-Year#ixzz2TTLRn3Qp>

**Slide 19:**

**Instructor/Facilitator Talking Points:**

- Now, we are going to discuss the skills that should be developed to become an effective leader.
- Four behaviors effective leaders engage in are: monitoring the team, establishing shared expectations and goals, pooling resources, and embracing team members’ perspectives.

**Slide 20:**

**Instructor/Facilitator Talking Points:**

- One effective leadership behavior is monitoring the team. Monitoring the team includes making sure everyone is checking themselves, their team members, the environment, and progress towards goals.
- Remember, these issues are more thoroughly covered in the Situation Monitoring Module. For more information, refer back to that module.

**Slide 21:**

**Instructor/Facilitator Talking Points:**

- Having established shared expectations, goals, and norms is critical for the future success of the group. In order to have these shared expectations, the team must work to clarify team responsibilities, determine team standards and regulations, and establish challenging but attainable team goals during the early stages of formation and throughout the teamworking process.
- Clarifying team responsibilities entails making sure everyone is on the same page about what the team as a whole is responsible for, and what each individual team member is responsible for. For example, at the beginning of a meeting, one might state: “Mr. Hodges will cover all psychological aspects of the report; Mr. Rosenfield will complete the academic aspects of the report, noting student academic progress; Mr. Newell will complete a summary of special services and leadership experiences in school. We have our time keeper. Can someone else serve as our note taker each week? Perfect.”
- Setting standards and regulations involves agreeing upon rules and norms of the team. For example, the leader might attempt to get the team to come to consensus by stating: “This meeting will be weekly at 2pm. Can we all agree to be on time? We have 45 minutes per week to discuss 3 students each week, so we will have to keep each student review to 15 minutes. Is there someone who is great with time and can keep an eye on their watch for us during the meeting? A timekeeper? Great. Should we agree to limit side conversations and turn off phones for these meetings? Okay, perfect. Also, I’d like everyone to have a backup staff member available to cover them for this meeting in case of emergencies so that we can move forward each week. Just let the team know this or next week who your backup will be for this meeting in case of emergencies. Because of the nature of the school setting, we all get pulled away sometimes, so we need to have backups in place.”
- Finally, establishing challenging yet attainable team goals is important. For example, one might state: “Our team needs to complete 3 student reviews per week. Let’s make sure these reports are understandable to all parents, including parents who are non-native English speakers. Does anyone have any ideas for strengthening the readability of those reports?”

**THINK-PAIR OR HOMEWORK:** Think of a team in your school in which you are a member or leader. Consider if these things have been addressed in your team.

**Slide 22:****Instructor/Facilitator Talking Points:**

- Another effective leadership behavior is pooling resources. When leadership is shared, this is everyone’s responsibility. Some types of resources that can be pooled include equipment (such as office supplies or media equipment), and knowledge (such as expertise and information).
- This system works best when team members are aware of what resources are available to be shared. For example, Ms. Smith may announce in a meeting that she has recently acquired a DVD player in her classroom that she is happy to loan out to the rest of the 4<sup>th</sup> grade team. As an example of knowledge resources, Mr. Jones may make it known that he is attending a regional workshop on legislative changes impacting the way IEPs are conducted, and that he is willing to be a resource when team members have questions about this topic.
- **INDIVIDUAL ACTIVITY OR THINK-PAIR :** Name one creative way you have, or a leader you have worked with has, managed limited resources in your school. How did team members pool resources to deal with this issue?
- **Note to Instructor:** Allow everyone a few minutes to brainstorm and then share their responses.

**Slide 23:****Instructor/Facilitator Talking Points:**

- Embracing all team members' perspectives is another effective leadership behavior. This involves demonstrating respect and concern for team members' opinions, and addressing team needs and concerns. Additionally, embracing perspectives involves answering any questions that team members have, and offering support for their tasks. Recall that task assistance is covered in more detail in the mutual support module.
- One example of a leader embracing all team members' perspectives is as follows: "How does everyone think we should divide work for these student reports? Everyone seems to be in favor of individually working on one section per person, but Mr. Gonzalez has suggested we work in pairs. We haven't considered this before, but he makes a good point in suggesting that this might enable a wider perspective on each individual student's performance in each of these areas. Let's reconsider how we're dividing this work. What does everyone think of this alternative approach?"
- **Note to Instructor:** Remember, these issues are also covered in the Mutual Support module. Feel free to reference materials from that module.
- **OPTIONAL ACTIVITY:** Think of a team member who embraced perspectives of you or another team member while you worked together on a team. Share your story with a partner.

#### Slide 24:

##### Instructor/Facilitator Talking Points:

- As a review, here are the four effective leadership behaviors that were just discussed.
- It is essential that leaders monitor the team and team performance to make sure the team is on track towards its goals.
- Leaders help the team reflect on past activities and plan for the future. This includes establishing expectations for behavior and setting challenging but attainable goals. Good leaders set standards for behavior and clearly communicate what they expect of each team member.
- Another leadership behavior is pooling resources. Team members should be up front about the knowledge or equipment they have and are willing to share. If teams do not have the proper materials and expertise, then even the most talented group of individuals can fail.
- Effective leaders not only assist the team in achieving its goals, but also create a climate that allows teamwork to flourish. This is done by embracing diverse team member perspectives.
- This training group has a designated leader – me – and I have engaged in several of the activities listed above. Together, let's look at our group, as a test case, to reflect upon my leadership behaviors in relation to this current group.
- **Ask:** Do any of these behaviors map onto the ways in which I have led this training experience? Is there any one behavior that stands out here as a behavior that I engaged in during the training? Perhaps there is something that I, as a leader of this group, did well or not so well.
  - **Note to instructor:** Allow a few minutes for the group to discuss. Tie responses back to the leadership behaviors in this module.
- Now, assess yourself. Which of these skills is your strongest? Which of these skills could you improve upon the most?
  - **Note to instructor:** Allow a few minutes for participants to think about this.

#### Slide 25:

**Instructor Tip:** This is an excellent time to offer a break or stop completely for the day, depending on the time constraints of your session.

##### Instructor/Facilitator Talking Points:

- In Part 3, we will be covering leadership strategies that can be used within teams. But first, let's review some concepts from Part 2.

## Slide 26:

### Instructor/Facilitator Talking Points:

- Remember that leadership is a journey, a set of actions. Four acronyms to help you remember effective leadership behaviors– and to reemphasize that leadership can be behavioral– are: STEP, SWIM, BIKE, and RACE. Remember to STEP up to your leadership triathlon. We will discuss each of these strategies in more depth.
- STEP= **S**elf, **T**eam members, **E**nvironment, **P**rogress towards goals
- SWIM= **S**tart **W**ith Intent and **M**eaning
- BIKE= **B**ring In **K**nowledge and **E**quipment
- RACE= **R**espect all viewpoints, **A**ddress questions and concerns, **C**onsider all perspectives, **E**ye contact with each team member

## Slide 27:

### Instructor/Facilitator Talking Points:

- **Ask:** Do you remember the STEPs? Discuss them aloud.
- Remember when we introduced STEP in the situation monitoring module? Well, now is your chance to use it! In order for leadership to be effective, leaders and team members should monitor themselves, team members, the environment, and progress towards the goal.
- **The STEPs include:**
  - **Self:** Monitoring yourself and your contributions is critical. You are a key player on the team and you are in charge of how you contribute to the team. Be aware of your abilities and how you can best help out the team.
  - **Team Members:** Cross-monitor your teammates. Be aware of others and how you can help them if they are struggling. Also, they may be able to help you if you need it!
  - **Environment:** Context matters. Pay attention to your surroundings and how this may impact the team.
  - **Progress:** Finally, it is crucial for you to monitor your team’s progress to ensure you are staying on track with your goals.

## Slide 28:

### Instructor/Facilitator Talking Points:

- You can establish shared expectations and goals by SWIM-ming.
- **S**tart **W**ith knowing what you **I**ntend to discuss, and be able to tie the **M**eaning of the discussion to the larger goal.
- SWIM is a helpful framework for briefs, debriefs, and creating an agenda.
- Briefs are meetings used specifically for planning. Teams use briefs before an activity occurs in order to talk about team goals and how each team member will contribute to the team’s goals. In particular, during a brief, it is important to discuss team goals, individual member roles and responsibilities, resources, and workload issues. Briefs are useful because they get everybody “on the same page” prior to working, which positively impacts coordination of individual team member activities. Planning allows for clarification of task assignments and members roles to ensure that each portion of the task is completed and no time is wasted by duplicated efforts. Thus, briefs are an excellent way to establish shared expectations and goals, and using the SWIM acronym can help you frame your brief.
- Debriefs are team meetings to discuss events after the team has begun or completed a task. They are used as opportunities to exchange information as well as provide team members with feedback. This allows the team to ensure that prior shared expectations are still current. Debriefs are most useful when discussing progress towards specific team goals and when mistakes occur. Through the

use of constructive feedback, debriefs can improve technical skills related directly to the task as well as teamwork skills focusing on interpersonal interaction. Before beginning a debrief, SWIM to remember what you intend to discuss, and what this means for the team.

- Agendas are a helpful way to ensure that one is SWIM-ing, and can facilitate the creation of shared expectations and goals. We will discuss agendas in more depth on the next slide.

#### **Slide 29:**

##### **Instructor/Facilitator Talking Points:**

- Meeting agendas are also a helpful tool to ensure that the team has shared expectations and goals. They are a great way to SWIM.
- Benefits of agendas include saving time during the meeting, and ensuring that the discussion stays on topic.
- Send out your agenda to meeting participants at least 24 hours in advance, if possible. This way, all team members have a chance to review and will have a shared expectation about what will be covered during the meeting.
- Items or topics on the agenda should be in the order in which they will be discussed during the meeting. This will mitigate potential confusing during the meeting and will allow team members to follow along.
- Make sure to close the agenda with follow up information (e.g., “Next meeting is Friday at 5pm in room 214”), so that the team has a shared expectation about next steps.

#### **Slide 30:**

##### **Instructor/Facilitator Talking Points:**

- Now we are going to apply the information that we just learned to an activity.
- Think about a meeting that you will be participating in over the next week or so. What is the goal of this meeting? Who is involved? What topics will be discussed? What will the action items be? Think about the answers to these questions and use the template on the screen to create an agenda for this meeting.
- Be sure that your agenda includes: your meeting title, date and time, location, a welcome message, a list of topics with affiliated information, a spot indicating that questions will be answered, and closing and follow-up information.
- **Note to Instructor:** *Allow participants to complete this activity individually or in small groups. Allow 10-15 minutes for this activity before moving on to the next slide. If participants finish before the allotted time, feel free to move on earlier.*

#### **Slide 31:**

##### **Instructor/Facilitator Talking Points:**

- Here is an example of what your agenda might look like. This agenda was created for an informational meeting about summer school. As you can see, this agenda lists the name, location, date and time of the meeting. It describes the key talking points with important details parsed out. Follow up information is included at the end.
- **Note to Instructor:** *Read aloud the agenda on this slide.*

#### **Slide 32:**

##### **Instructor/Facilitator Talking Points:**

- Remember, everyone on your team is a resource and can bring unique contributions to the team. In order to make sure that your team is pooling resources, remember to BIKE! That is, bring in your knowledge and expertise. This will help your team to identify what resources each team member

will bring to the table and identify what things are needed. Leaders may ask questions such as “What are everyone’s skills and unique knowledge?” or “What tangible items do we need to accomplish our goals?”

**Slide 33:**

**Instructor/Facilitator Talking Points:**

- Here is an example of applying the “BIKE-ing” strategy to a real-life situation.
- **Note to Instructor:** *Have the participants read the example while you read the example aloud.*
- In this scenario, Ms. James was able to learn how to use the required equipment, and was able to do so because Mr. Chris had previously made her aware of his expertise with the SMART Board™.

**Slide 34:**

**Instructor/Facilitator Talking Points:**

- It is important to embrace team members’ perspectives. One key part of this involves encouraging input or feedback from other members. To do so, encourage all team members to speak up during meetings. This can be helpful for encouraging those who may, for some reason, be reluctant to express their opinions. This can be done by making eye contact with each member and providing brief periods of silence to encourage people to speak up. The benefits include allowing concerns to be voiced, giving everyone a chance to contribute, and allowing everyone to take ownership of their work.
- Encourage all team members to speak up during meetings by **RACE**-ing:
  - **R**espect all viewpoints
  - **A**ddress questions and concerns
  - **C**onsider all perspectives
  - **E**ye contact with each team member
- There are many benefits of embracing perspectives. First, it allows concerns to be voiced. Additionally, it allows all team members to contribute. Lastly, doing so ensures that all team members will take ownership of the work.

**Slide 35:**

**Instructor/Facilitator Notes:**

1. *Divide the whole session into groups of three to four people (or a group size that is appropriate for the amount of people in the session).*
2. *Ask participants to conduct this think-small group-share-activity.*
3. *Finally, each group can share with the whole group.*

**Slide 36:**

References