

Supervisory Skills II: Self-Awareness, Self-Management, and Constructive Feedback

Goal

- To introduce consumers to three basic skills necessary for effective supervision: self-awareness, self-management, and giving constructive feedback.

Time

4 hours, plus breaks

Activities	Teaching Methods	Time
7.1 Welcome & Homework Review	Discussion	30 minutes
7.2 Awareness of Self and Others in Supervision: Blocks to Listening	Interactive Presentation, Role Play, Small- Group Work, Discussion	60 minutes
7.3 Self-Management: Pulling Back in Supervisory Relationships	Role Play, Discussion, Interactive Presentation, Brainstorm, Pairs Work	60 minutes
7.4 Giving Constructive Feedback	Brainstorm, Discussion, Pairs Work	60 minutes
7.5 Closing	Discussion	30 minutes

Supplies

- Flip chart, easel, markers, tape, name tags or table tent card stock
- Paper and pens or pencils

Note: An overhead projector with transparencies or LCD projector and computer may be used for some presentations, if desired. If you intend to use a projector, make sure you have the necessary equipment and screen. (Some PowerPoint slides are provided on your CD. Others can be made by converting handouts to PowerPoint slides or projecting them in their current formats.)

Handouts

- Handout 1: Listening Blocks
- Handout 2: Pulling Back
- Handout 3: Self-Awareness Is Key to Pulling Back
- Handout 4: Analyzing Feedback Effectiveness
- Handout 5: Simple Rules for Giving Feedback
- Handout 6: Practicing Constructive Feedback

Advance Preparation

Set up the workshop space to allow for interactive sessions, keeping in mind participants' physical needs.

Review the teaching materials for each activity.

If using an overhead or LCD projector, set up equipment, as necessary, for optimum viewing by all participants.

Activity 7.1 Welcome & Homework Review

Prepare a **flip chart** for step 1, "Listening: Lessons Learned." Prepare a flip chart page with the day's agenda, including breaks, to review with participants (step 4).

Prepare **flip chart** for "Warm Up" activity (step 2).

Post **flip chart** pages from Session 6 with "Supervising Personal Assistants: Goals and Objectives," "Learning Agreements," "Parking Lot," and participants' hopes for learning about supervision.

Activity 7.2 Awareness of Self and Others in Supervision: Blocks to Listening

Copy all five pages of **Handout 1: Listening Blocks** for all participants.

Prepare a flip chart page with a list of all the blocks, as shown in step 7.

Be prepared to share examples of your own listening blocks.

Prepare a **flip chart** for step 11, "What will help you become aware that you are using listening blocks?" and "What strategies can you use to overcome listening blocks?"

Activity 7.3 Self-Management: Pulling Back in Supervisory Relationships

Copy **Handout 2: Pulling Back** and **Handout 3: Self-Awareness Is Key to Pulling Back** for each participant.

If there is no co-instructor, ask for a participant volunteer to help you with the demonstration role play. Explain that he or she will play a personal assistant who is angry and disrespectful toward the consumer. A sample role play is provided in the Teaching Tips accompanying step 2.

Be prepared to share personal experiences of situations that have provoked you, choices you've made, and successful pull-back strategies you use.

Prepare a **flip chart** page with the definition and steps for pulling back as shown in step 6.

Prepare a **flip chart** page with the "Strategies for Pulling Back" as shown in step 10.

Activity 7.4 Giving Constructive Feedback

Prepare a **flip chart** "You are so much better than my other personal assistants" creating columns for Intention, Impact, and Outcome as shown in step 1.

Prepare a **flip chart** page with the definition of feedback as shown in step 8.

Copy **Handout 4: Analyzing Feedback Effectiveness**, **Handout 5: Simple Rules for Giving Feedback**, and **Handout 6: Practicing Constructive Feedback** for all participants.

Activity 7.5 Closing

Have ready the **flip chart** from Module 6 where you recorded participants' hopes for learning about supervision.

Prepare a **flip chart** page to record evaluation scores as shown in step 2.

Discuss future plans with coordinators at your sponsoring organization so that you are prepared to discuss them with participants.

Prepare a **contact list** of participants if they agreed that they would like to share information at their last session.

Prepare for the **graduation activity** and obtain supplies (see "Teaching Tips" in Activity 7.5).

Activity 7.1 Welcome & Homework Review

30 minutes

Learning Outcome

By the end of this activity, participants will be able to:

Describe the workshop goal and objectives and the day's agenda.

Key Content

- The focus of today's activities is on continuing to build skills needed to effectively supervise personal assistants using the coaching supervision approach.
- The last session covered active listening skills, including asking open-ended questions and paraphrasing. This session introduces self-awareness and self-management skills, both of which are essential to becoming an effective supervisor. Self-awareness and self-management prepare consumers to give feedback constructively and thereby maintain positive relationships with PAs.
- Using these skills will make it more likely that consumers will speak confidently about their needs and preferences, have great relationships with their PAs, be able to address problems and needs that arise, and keep PAs they value with them longer.

Activity Steps

Discussion—30 minutes

1. **Welcome everyone back to the workshop.** Ask if anyone has any concerns or stories to share since the last meeting. Ask if participants followed up on the homework assignment and practiced their listening skills. Ask them how it went. Write highlights on a flip chart page.

LISTENING: LESSONS LEARNED



2. **Conduct a warm-up exercise:** Ask participants, "What are open-ended questions?" When you have the answer, explain that the warm-up activity will give everyone a chance to get to know each other better by asking open-ended questions. Review the instructions with participants using the prepared-in-advance flip chart. Introduce yourself (points 1 and 2 on the flip chart) and then ask an open-ended question of an individual in the class. Next have this person introduce him- or herself, answer the open-ended question, and then ask a question of their choice of another individual in the class who has not spoken yet, and so on until everyone is introduced.

WARM-UP ACTIVITY



1. Give your name (and your PA's if they're here)
2. Remind us of what we can do to help you have the best learning experience possible
3. Answer the open-ended question asked of you
4. Ask an open-ended question of another participant who hasn't spoken yet, such as:
What do you like most about consumer self-direction?
What's your favorite place in the world? Why?
What would you do if you won the lottery? Why?

3. **Review workshop goals:** Referring to the prepared-in-advance two flip chart pages, review the workshop goal and objectives. Note that in the last session they achieved the first two objectives, as well as the last one. Today's focus will be on self-awareness, self-management, and giving constructive feedback, the topics not yet covered.

SUPERVISING PERSONAL ASSISTANTS

Goals

- To introduce participants to the purpose of supervision and the skills needed to use a coaching approach
- To help participants understand the role of supervision in getting their needs and preferences met



SUPERVISING PERSONAL ASSISTANTS

Goals

Objectives

After completing this workshop, participants will be able to:

- Describe the purpose, roles, and responsibilities of supervision
- Identify the qualities of a great supervisor
- Understand what skills are required to be a coach-supervisor, including active listening, self-awareness, self-management, and giving constructive feedback
- Demonstrate the use of active listening skills, pull back, and effective feedback



4. **Review the day’s agenda:** Using a prepared flip chart with the agenda and times as *you* have scheduled the session, note the highlights, including break times.

TODAY'S AGENDA (SAMPLE)	
7.1 Welcome & Homework Review	11:00 a.m.
7.2 Self-Awareness: Blocks to Listening	11:30
Break	12:30 p.m.
7.3 Self-Management: Pulling Back	12:45
7.4 Giving Constructive Feedback	1:45
7.5 Closing	2:45
Adjourn	3:15



❖ **Teaching Tip**

The agenda for the day is flexible. The number of breaks you need will depend on your participants. If this is too long a day, consider breaking the workshop into two parts.

5. **Review workshop learning agreements:** Referring to the prepared-in-advance flip chart saved from the prior session, remind participants of the learning agreements and your hope of creating a safe place to share experiences and to build a supportive community. Also, remind everyone of any needs participants have asked others to accommodate and thank everyone for helping to ensure that their needs are taken care of. Encourage people to raise their concerns if others need reminders.

WORKSHOP LEARNING AGREEMENTS
Create a safe, supportive space:
1. Listen for understanding.
2. Speak about issues, not individuals.
3. Questions are great! None are stupid.

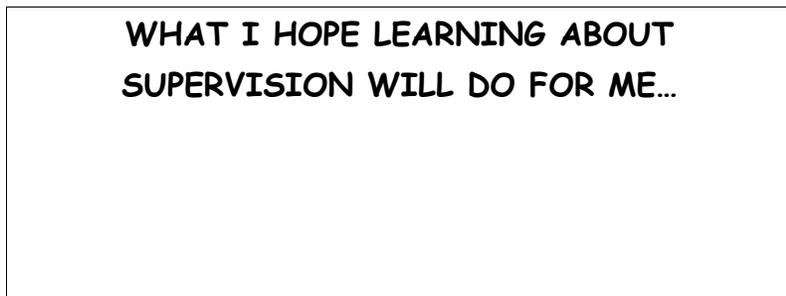


4. Everyone participate, no one dominate.
5. No side conversations or cell phones, please.
6. Everyone facilitate so we stay on track!

6. **Explain parking lot:** Display a flip chart labeled "Parking Lot" and explain that this will be the place to record issues that come up that are important, but can't be addressed at the time they arise because of the schedule and your efforts to cover all the topics in the session.



7. **Review hopes from Session 6:** Review the flip chart from Session 6, Activity 1, where you recorded participants' hopes for learning about supervision. Ask participants, "Are we addressing your hopes?" Highlight what's coming up in the session that you believe will address specific hopes.



8. **Thank everyone** for coming to the session and plunging into the discussion.

Activity 7.2 Awareness of Self and Others in Supervision—Blocks to Listening¹

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify the most common blocks to listening;

Individually, identify the two blocks that most often keep them from listening as effectively as they can; and

Be more aware of these blocks in themselves as they arise in listening situations.

Key Content

- Blocks to listening are distractions, usually unconscious, that keep people from listening with their full attention.
- Everyone experiences blocks to listening at least some of the time. It is very common not to listen 100% of the time with 100% effort because listening well is difficult and takes a lot of energy and concentration. It is true that everyone has the ability to listen well, but various distractions get in the way.
- For various reasons, people often unconsciously block themselves from listening.
- For participants to “unblock” their listening, they must first become aware of the times they get distracted. Becoming aware of one’s blocks is the first step in changing listening behavior because it helps to consciously put the blocks aside and bring one’s full attention to listening.

- Since listening is a vital skill in supervision, it is important for participants to become aware of when and why they stop listening, especially in supervisory interactions.

Activity Steps

Interactive Presentation and Demonstration Role Plays—30 minutes

1. **Begin discussion:** Ask participants, with good humor:

Has anyone ever day-dreamed or "zoned out" when someone was talking to you or telling you a story? Or done this during a class presentation or discussion?

Ask for a show of hands. Affirm that that this happens to nearly everyone; everyone is prone to zoning out from time to time.

2. **Explore what happens when listening is difficult:** Ask participants to picture a person in their head that they have had a difficult time listening attentively to in the past. If they can think of someone they've supervised, that's great. Now ask:

What happens for you when you are with this person?

Where is your mind?

What are you thinking?

What price do you—and the other person—pay for poor listening?

❖ Teaching Tip

To break the ice, it is very helpful at this point to share a personal experience of having a difficult time listening to a particular person. Humor is helpful!

3. **Introduce the session:** Explain that in this session the group will talk about common listening blocks and explore what blocks they experience most frequently. Review the Key Content above, and then distribute the **Handout 1: Listening Blocks**.

- 4. Begin reviewing the listening blocks:** Read the explanation for “rehearsing,” the first listening block (or have a participant read it aloud). Then, explain that, when in the examples, the outline around a person’s words is like a cloud rather than a circle, it’s indicating that this is what the person is thinking to themselves—not saying. This means that this block is an “internal” block. Ask for a volunteer to play the PA in the example, and demonstrate holding your hands in a circle over your head as you read the consumer’s part. Debrief this block by asking:

Do you ever not hear what people are saying because you are rehearsing?

Does anyone want to share a story of when you’ve not listened because you were rehearsing?

Discuss by exploring the impact on the speaker, the listener, and the relationship.

❖ **Teaching Tips**

Provide examples that are true to you and do not hesitate to own them. Owning them by saying “this block applies to me,” demonstrates that it is acceptable to have blocks to listening. Using humor is great.

If possible, try to connect the participants’ stories shared earlier to particular listening blocks (only do this if you sense the person who shared the story wouldn’t be offended by your bringing it back into the conversation) in a non-judgmental way, with good humor. Be sure not to make the person a negative example! For example, a person who shares that she does not listen to her husband because she knows what he is going to say next may be “mind reading.” Acknowledge that we all block listening at times.

- 5. Present the next block:** Move to the next block, “filtering.” Read the explanation aloud and then read the example with a volunteer. Note that in this block, both of the balloons are simple circles, so the listener is actually speaking aloud to the other. Ask the group if any of them can relate to this block. Look for nods or hands, and ask if anyone would like to share a story about how they filter at times.

6. **Review the remaining blocks.** Engage the group by asking volunteers to role play the examples in Handout 1, and then asking participants for their own examples of each block. The more open and willing you are to disclose your struggles with the listening blocks, the easier it will be for participants to acknowledge these blocks in themselves.

7. **Wrap up discussion and invite people to name their most common blocks:** After going through all the listening blocks, display the prepared-in-advance flip chart with all the listening blocks listed. Ask if anyone can think of additional blocks. Ask for examples, and write the blocks on the flip charts. Point out that there is room to add more blocks on page 5 of their handout. Then, ask participants to write down their two most common listening blocks in the space provided on page 5. Give participants a few minutes to do this.

LISTENING BLOCKS	
<input type="checkbox"/> Rehearsing	<input type="checkbox"/> Sparring
<input type="checkbox"/> Mind Reading	<input type="checkbox"/> Comparing
<input type="checkbox"/> Filtering	<input type="checkbox"/> Judging
<input type="checkbox"/> Dreaming	<input type="checkbox"/> Advising
<input type="checkbox"/> Identifying	<input type="checkbox"/> Placating



8. **Announce the small-group activity:** When the group has finished writing, explain that for the next fifteen minutes they will discuss their particular listening blocks in small groups.

Small-Group Work—15 minutes

9. **Set up and conduct small groups:** Divide participants into groups of three. Explain that each person is to name his or her blocks, talk about how they come up, and give examples of each of them. Then the group should discuss how common the challenges to good listening are. Circulate among the groups during the discussions. Help ensure that conversations stay on track and that everyone gets a chance to share.

❖ **Teaching Tip**

Depending on the group size and comfort level within the group, this can be done in a large-group discussion or in pairs.

Discussion—15 minutes

10. **Facilitate a discussion in the large group:** After the participants have shared their blocks with each other in the small groups, have them come back together in the large group. Invite people to raise their hands for their top two blocks and note the votes on the flip chart with the list of blocks. Use this to share how much we all have to work on not being blocked. Ask for other highlights from their discussion.
11. **Brainstorm strategies for overcoming the blocks:** Ask participants to consider how they can become aware of their listening blocks and what strategies they can use to overcome them (particularly in the context of supervising a PA). Write the questions and responses on a flip chart page:

<p>What will help you become aware that you are using listening blocks?</p> <p>What strategies can you use to overcome listening blocks?</p>



12. **Cover these strategies:** If the following ideas are not suggested by the group, be sure to include them on the list:
- Do a mental check-in with yourself every minute or so while listening (abbreviate to **“mental check-ins”** on the flip chart).
 - Practice listening to someone who knows you well, and ask them to point out every time they notice your attention straying (abbreviate to **“practice with partner”**).

- If you notice while someone is talking to you that listening is becoming more difficult for you, ask the person to pause for a moment. Ask yourself what blocks are coming up for you (abbreviate to “**pause to find the cause**”).
- When you notice your mind is straying, make a decision to paraphrase the next idea the speaker talks about in order to refocus (abbreviate to “**plan to paraphrase**”).

13. **Wrap up the discussion:** Remind the group that simply becoming aware of their blocks is the most important step in making the conscious choice to set them aside as they listen. Invite them to make a point of noticing when blocks come up for them in the next week, particularly with their PAs. They may even want to reflect on their conversations at the end of day and consider how to avoid the blocks the next day.

14. **Thank everyone** for their active participation in this discussion—and being willing to reveal their own blocks.

Activity 7.3 Self-Management: Pulling Back in Supervisory Relationships

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe how emotional responses often get in the way of their ability to listen attentively;

Explain that pulling back from their emotional responses and the desire to offer solutions or fixes can lead to more effective communication; and

Identify strategies for pulling back from their emotional responses.

Key Content

- When people are faced with situations or people who provoke an emotional response, listening can become difficult and communication emotionally charged. While people rarely have control over others' words or behavior, each person can control his or her own emotional responses and how they react in a situation.
- "Pulling back" allows a person to think more clearly (i.e., not get caught up in an emotional or automatic reaction), listen more effectively, better understand what was said, and reply more constructively. This kind of clear and objective thinking is important in supervising PAs.
- Pulling back from a PA's emotionally charged statements, followed by paraphrasing, allows a consumer to gain emotional control of him- or herself. This opens up the conversation and the potential to achieve a positive resolution to a problem situation.

- Pulling back from an emotional response does not mean being soft or allowing dishonest employees to get away with something. In fact, using pull-back strategies makes it much less likely that a supervisor will be misled or manipulated. Maintaining objectivity allows for keener listening and fuller exploration of the situation with the personal assistant.
- In addition to pulling back from emotions that get in the way of active listening and constructive interactions, supervisors frequently also need to pull back from the temptation to problem solve the issue *for* the personal assistant. Jumping in to offer solutions has a number of drawbacks: supervisors often don't learn all the information important to the situation, they may offer solutions that the PA feels compelled to agree with – even if the solutions don't work well for the PA. Also PAs are likely to have less investment in solutions they don't come to on their own.

Activity Steps

Demonstration Role Play and Discussion—10 minutes

1. **Acknowledge challenges in the supervisory relationship:** Note that, in spite of participants' best efforts to understand their personal assistants, there may be times when they are annoyed by their PAs and find it difficult to stay calm. Or, there may be times when PAs present them with problems and they want to jump in with solutions or the "right" answer.
2. **Introduce role play:** Explain that the instructors will now conduct a brief role play to demonstrate one such situation. Ask your co-instructor or a volunteer (see Advance Preparation) to come forward. Introduce yourself as the consumer and your assistant as the personal assistant, and conduct a role play that demonstrates a situation in which the consumer is upset but doesn't pull back (see Teaching Tips below).

❖ Teaching Tips

The first role play demonstrates a situation in which a personal assistant says something inappropriate to the consumer, who by responding emotionally, aggravates the situation. An example is provided below; however, instructors should tailor the role play to situations known to be problems for participants.

Sample scenario: The PA is in the kitchen doing the dishes and the consumer is in the living room.

The consumer says mildly, “You better hurry up; there’s only an hour left of the day and you still need to clean the cat box, dust the living room, make the bed, and clean the toilet.”

The PA shouts angrily, “Geez. Why are you always on my back! I’m not a child. I am perfectly clear about how much I have to do. If you keep riding me about it, that will be the last straw!”

The startled consumer shouts back, “Well, believe me, I didn’t mean to offend you. You may not be a child but you’re sure acting like one now with all that outrage. If you can’t take a few simple reminders, I might as well start looking for someone else who can!”

- 3. Debrief the role play:** Ask the following questions and facilitate a discussion.

What did you observe about the consumer’s response to the personal assistant?

How do you think the PA felt? Towards the end, what was the consumer’s response?

What is the likely outcome for the relationship?

How could the consumer have responded differently in order to get a better, more productive outcome?

- 4. Explain the importance of pull back and listening:** Emphasize that the consumer responded out of an emotional place—reacting to the PA’s emotions, actually “mirroring” them. This is a common trap. Review the first two bullets in key content:

- When people are faced with situations or people who provoke an emotional response, listening can become difficult and

communication emotionally charged. While people rarely have control over others' words or behavior, each person can control his or her own emotional responses and how they react in a situation.

- "Pulling back" allows a person to think more clearly (i.e., not get caught up in an emotional or automatic reaction), listen more effectively, better understand what was said, and reply more constructively. This kind of clear and objective thinking is important in supervising PAs.

Let participants know that you'll revisit the role play in a little bit. Remind them that, as shown in the listening and paraphrasing activities, people listen well when they bring their full attention to a conversation. However, having an emotional response to a speaker is one of the most powerful blocks to listening. In supervision, being able to keep listening is of key importance.

Interactive Presentation and Discussion – 10 minutes

5. **Distribute and review Handout 2: Pulling Back.** Review Option A and Option B and the impact of each. Show how Option B relates to the role play. If helpful, add a personal example (see Advance Preparation).
6. **Cover the definition of "pull back" and invite discussion:** Turn to the prepared-in-advance flip chart page with the definition of "pull back" and the steps for pulling back. Review the definition and steps. Ask participants for examples from their own experience of when they might need to pull back and gain control over their emotions.

TO "PULL BACK" MEANS:

- To pause
- To acknowledge our emotions and get them under control
- To listen, observe, and assess the situation clearly before responding

STEPS FOR PULLING BACK:



- Recognize the need to pull back by noticing our internal reactions, asking:
What emotion is coming up for me?
- Engage our pull-back strategies
- Put our attention back on the other person
- Listen actively
- Repeat if necessary

7. **Introduce pulling back from problem solving:** Note that, just as it is hard to pull back from strong emotions, consumers also need to pull back from jumping in with solutions or fixes to the problems and issues PAs bring to them. As supervisors of PAs, it is much more effective to actively listen to the PA and let him or her figure out a solution. Ask how many people notice that they have a tendency to solve their PA's problems. Acknowledge people's response and say that, while the focus of this activity is on strong emotions, we hope they'll keep "jumping in to solve problems" in mind as well.
8. **Introduce strategies for pulling back:** Explain that people use multiple strategies to pull back in stressful situations. The goal of this activity is for participants to become aware of the strategies they use, to strengthen those strategies, and to learn new strategies.
9. **Check if people have disabilities that affect their ability to pull back:** Suggest that some disabilities, such as some brain injuries, can affect a person's ability to control their emotional reactions. Ask if anyone in the room would like to discuss this point. If a participant volunteers, ask them to describe the challenge, and what strategies they find helpful in managing the disability. Note that explaining this challenge to PAs from the start, even during interviews, may be a good strategy. Thank volunteers for their contribution and explain that you'll now go forward with a broader discussion about strategies.

Brainstorm—10 minutes

10. **Brainstorm strategies for pulling back:** Ask the group to brainstorm different strategies for pulling back. Ask:

How can you gain emotional control in 5 seconds or less?

Write the strategies on a flip chart page. Briefly give examples of pull-back strategies that have worked for you, professionally and personally, to get things started.



❖ **Teaching Tips**

The list could include: take a deep breath, silently say a prayer, silently count to five, and silently talk to myself, such as “I have the strength to deal with whatever is happening here.”

Some strategies may not be appropriate responses to stressful situations (for example, walking away). Redirect or reframe these responses before writing them on the flip chart page.

11. **Introduce in-the-moment and prepared-in-advance strategies:** Explain to the group that there are two categories of pull-back strategies. The first are strategies that people use immediately (in the moment) when they are having an emotional response. The second are strategies people use when they know they are going to be in a potentially stressful situation, such as a difficult meeting or phone conversation, and there is time to prepare.

12. **Discuss the types of strategies on the list:** Quickly review the list you’ve created on the flip chart, and ask participants to identify which strategies are immediate, or in the moment, and which ones are preparatory. Label each strategy with an “I” or a “P.” Some strategies will work well at either time. Ask if this prompts any more ideas of good strategies and add them to the list.

❖ **Teaching Tip**

Examples of preparatory strategies include: vent or talk to a coworker about the situation, listen to soothing music, and imagine yourself staying calm and collected during the situation. Some strategies may belong on both lists.

Demonstration Role Play—10 minutes

13. **Repeat the role play:** This time, have the personal assistant act in the same way but have the consumer use a pull-back technique. Draw from the list of participants' suggestions about how to better respond to the situation.

❖ **Teaching Tips**

Here is a sample script you may use:

Sample scenario: The PA is in the kitchen doing the dishes and the consumer is in the living room.

The consumer says mildly, "You better hurry up; there's only an hour left of the day and you still need to clean the cat box, dust the living room, make the bed, and clean the toilet."

The PA shouts angrily, "Geez. Why are you always on my back! I'm not a child. I am perfectly clear about how much I have to do. If you keep riding me about it, that will be the last straw!"

The startled consumer takes a deep breath and paraphrases what the PA has said (the instructor should exaggerate this and other pull-back strategies so that participants will be able to identify them): "It sounds as if you're very upset with me. I didn't realize you were feeling so stressed."

PA, calming down but still upset: "You act as if you think I don't have a brain! I know I'm running late and I'm already worried enough as it is."

Consumer, sounding concerned: "Well, I appreciate that you're so concerned about getting things done. Thanks."

PA: "Well, I'm sorry I yelled. I was so tense that I just snapped when I felt as if you were yelling at me. Let me get back to work and get things done!"

12. **Debrief the role play:** Ask the following questions and facilitate a discussion:

*What did you observe this time about the consumer's response to the PA?
What pull-back strategies did he or she use?*

How were both the PA and consumer feeling in this situation?

Did the consumer get more information about the PA?

Did they address the consumer's concern?

What is the likely outcome for the relationship?

Pairs Work and Discussion—20 minutes

13. **Set up and conduct the pair activity:** Ask people to partner with the person sitting next to them. Pass out **Handout 3: Self Awareness Is Key to Pulling Back**. Ask everyone to think about the situations, behaviors, and people in their life that provoke or have provoked them emotionally, and the emotions they raise. Have them take 10 minutes to discuss this question with one another and write down what they think of in the two columns on their handout.

14. Point out to participants that anger is not the only emotion that gets "provoked"—sadness, discouragement, helplessness, joy, and excitement are other feelings that are sometimes triggered. It is necessary to pull back from all of these emotions if the intention is to listen well. Remind them that page 2 of **Workshop IV, Session 6, Handout 13: Paraphrasing and Asking Open-Ended Questions Practice** has a long list of emotions that they can look at if they would like help identifying how they feel. If they have time before the 10 minutes is up, they can move on to discussing times when they feel that they have handled challenging situations really well.

❖ **Teaching Tip**

The first images that come to mind when someone says, "What provokes you?" tend to be very strong and are directly useful in this pull-back activity. "Provoke"

is intentionally used here to bring to mind previous emotionally charged situations.

15. **Debrief the pairs work:** Return to the large group and ask if anyone would like to share a situation, the emotion it stirred, and how they handled it well. From the situations that were handled well, draw out effective pull-back strategies that participants used. Check these off on the flip chart from step 10, Strategies for Pulling Back.

STRATEGIES FOR PULLING BACK

Taking a deep breath (I) ✓
Reminding myself what happens when I react without thinking (I) ✓
Rehearse how I want to handle it next time (P)



❖ **Teaching Tip**

If time allows, and participants are very engaged in the discussion, consider recording the “feelings provoked” on a flip chart. Emphasize that each of us has to manage dozens of emotions and reactions each day and we need compassion for ourselves—and for others—who are also being challenged.

16. **Invite more sharing:** Ask participants to share situations that, in hindsight, they would like to have handled differently.

❖ **Teaching Tip**

Participants may be shy in sharing situations they wrote and that is okay. Move on to the next point.

17. **Have participants choose their own pull-back strategies:** From the list of pull-back strategies, have each participant who shared a situation identify at least one preparatory and one in-the-moment strategy to use if they should face that situation/person again. Invite them to write it at the bottom of their handout.

18. **Wrap up the discussion:** To close, ask participants to continuously pay attention to their emotional reactions to situations. Explain that being aware of and able to accurately describe their emotions will help participants manage their emotions and not implode or explode. Managing emotions is essential to establishing and maintaining healthy supervisory relationships—and taking good care of themselves. Thank participants for their efforts and for sharing.

19. **Thank everyone** for their honesty and thoughtfulness in exploring their own pull-back needs.

Activity 7.4 Giving Constructive Feedback

60 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Describe two key goals of constructive feedback; and

Explain the importance of giving constructive feedback to personal assistants.

Key Content

- One of the most important skills of a supervisor is the ability to give feedback to personal assistants (PAs). When a supervisor gives feedback, he or she provides useful information about the PA's approach, skills, or responses in a situation. Feedback may have one of two goals: (1) To express appreciation and reinforce the PA's actions when they meet the consumer's needs and preferences; and (2) to express that the consumer's needs and preferences have not been met and provide information that will change the PA's actions by clarifying expectations. Giving feedback will help develop a PA's skills and build confidence.
- Effective feedback is always constructive. Constructive feedback is based on facts and observations, and is given with the belief that the PA can use the information to improve what isn't working or continue what is working in the relationship. Learning how to give helpful, specific, and descriptive feedback can be challenging and takes practice.
- Constructive feedback addresses both what a personal assistant is doing well, and what he or she needs to improve in order to provide quality services for the consumer. If feedback focuses only on what a PA does well, he or she may come to question the sincerity of the feedback. If feedback addresses only what a PA needs to improve, he or she may become discouraged or resentful, and may even leave the job. Thus, a balance—weighted heavily in favor of the positive—is necessary.

Activity Steps

Brainstorm and Discussion—30 minutes

1. **Lead discussion of feedback challenges:** Write the following statement on a flip chart page and explain that this is “feedback” a consumer gave to her personal assistant.

"You are so much better than my other personal assistants!"		
Intention	Impact	Outcome



Invite participants to use **Handout 4: Analyzing Feedback Effectiveness** to take notes if they would like. Ask participants why they think the consumer said this to the personal assistant. Ask:

What was her intention? Possible responses include:

- ◆ To enhance the PA’s feelings of confidence
- ◆ To express gratitude
- ◆ To gain alliance with the PA
- ◆ To cause conflict between this PA and the other PAs
- ◆ To get the PA to train other PAs

Record all participant responses under “**Intention**” on the flip chart. Add your own ideas if you want to broaden the discussion and to ensure that both positive and negative possibilities are considered for this point and others below.

2. **Discuss the impact:** Following this discussion, ask participants:

How do you think the personal assistant felt after hearing this feedback?

Responses may include: superior, pleased, worried, proud, over-confident, uncomfortable.

Record these responses under **"Impact"** on the flip chart.

3. **Discuss possible outcomes:** Following this discussion, ask participants:

What might the personal assistant do after hearing this statement?

Responses may include: perform better, tell other PAs and cause conflict and tension, ask for a raise.

Record these responses under **"Outcomes"** on the flip chart.

4. **Analyze intentions:** After recording the Intention, Impact, and Outcome for the statement, refer to your list of intentions and ask the group to identify which intentions are "good" or "valid." Circle these.
5. **Analyze impacts:** Next, have the group identify the impacts that are "positive" and "productive" in getting the personal assistant services the consumer needs or desires. Circle these.
6. **Analyze outcomes:** Lastly, have the group identify the outcomes that are "desirable." Circle these.

❖ **Teaching Tip**

You will see that there are likely to be very few desirable outcomes, despite the consumer's possible good intentions. Making a note of this is important.

7. **Continue discussing feedback challenges:** As time allows, continue the same analysis as above using one or two of the following statements. You may use the flip chart again, or have a more general and quicker discussion about each without using the flip chart if you feel that participants are fully understanding the analysis.

"You're lucky I'm old enough to be your father. Otherwise, I'd be flirting with you."

"Why do you have to be so careless?"

"That's not the way I trained you to do this!"

❖ **Teaching Tip**

The answers to these questions will inevitably generate a list of responses that constructive feedback, when given effectively, should *not* do. If you are finding that many good ideas are coming up, you may want to write them on a flip chart.

8. **Introduce goals of feedback:** Referring to the prepared-in-advance flip chart, review the goals that define feedback:



FEEDBACK HAS TWO GOALS:

1. To express appreciation and reinforce the PA's actions when they meet your needs and preferences; and
2. To express that your needs and preferences have not been met and provide information that will change the PA's actions by clarifying your expectations.

9. **Discuss feedback:** Ask participants:

Knowing now that a few misspoken words can have such undesirable outcomes, how do you give feedback that will have the impact and outcomes you desire, and meet your intentions?

Discuss ideas people have.

10. **Introduce constructive feedback principles:** Distribute **Handout 5: Simple Rules for Giving Feedback** and review, highlighting points that participants have already made. Offer additional examples of not following

the rules to make the handouts come alive, or ask participants for examples from their own experience. Invite participants to add any other “rules” they’ve learned and encourage them to add these to the list.

Pairs Work and Discussion—30 minutes

11. **Set up pairs work:** Distribute **Handout 6: Practicing Constructive Feedback**, which has a specific event that needs to be addressed and a feedback statement in response to the behavior. Assign one or two events to pairs of participants (or you can continue to work as a large group) to identify which feedback rule the feedback statement breaks and to come up with an effective feedback statement.
12. **Have pairs report out and discuss:** Ask a pair to read one of their “Event” statements followed by the feedback given in response. Then have them describe the rules the feedback statement broke, and give their new effective feedback statement. Ask others, “Did that sound effective and constructive to you? What do you think the impact of this feedback will be? What is the the outcome of using it likely to be?” Continue to ask each pair to report out. As time allows, ask pairs to report out about their second statements as well.
13. **Wrap up the exercise:** Ask participants what is the biggest lesson they will take away from this exercise. Encourage everyone to keep practicing—as it takes time to learn these and all the skills we’ve been covering.
14. **Thank everyone** for their active participation and good work.

Activity 7.5 Closing

30 minutes

Learning Outcomes

By the end of this activity, participants will be able to:

Identify at least one thing they learned in this session that they will use when supervising their personal assistants.

Key Content

- Providing closure and determining next steps to the training series is essential for group development and planning. As the final session of the workshop series, this closing has two purposes:
 - *Closing for the day's session:* This time allows the instructor to wrap up the day's discussions, answer additional questions, and convey the next steps to the group. In addition, the end-of-day wrap up allows participants to share what they learned and provide an informal evaluation for the instructor to know what parts of the training were most useful.
 - *Closing for the workshop series:* The closing provides a time and space for participants to identify overall learnings, establish next steps (how they will use the material), ask any final questions, give comments, and share thoughts on their experience to date. As the design of the material allowed for much interaction and community building, closing the series in a celebratory way is essential to honoring the relationships formed and work done together.

Activity Steps

Discussion—15 minutes

1. **Check on learning from the supervision workshop:** Explain that this is the end of the "Supervising Personal Assistants" Workshop. It's a time to

reflect on what participants learned and how that learning can be applied to their personal situations. Bring out the list of hopes that participants listed in Workshop IV, Session 6, and check if people feel their hopes have been addressed.

WHAT I HOPE LEARNING ABOUT
SUPERVISION WILL DO FOR ME...



Ask participants to think about their current and future supervisory endeavors:

Looking at the list of hopes you expressed originally, how have your hopes been addressed?

What is the most important thing you learned today and how will you apply it to your own situation?

What is one thing you learned in this session that you will use when you supervise your personal assistants?

Remind participants that the class has been an *introduction* to supervisory skills, and that their skills will improve as they practice them and continue to use what they have learned.

2. **Conduct a quick evaluation:** Ask participants, "How much of today was a good use of your time?" Invite them to vote for one of the percentages you have listed on a prepared-in-advance flip chart as shown below.

After they've voted and you've recorded their responses (praising those who gave lower rankings for their honesty), ask them to tell you what worked

really well for them—the “highlights”—and what they think could be better—the “things to improve.” Record ALL answers on the flip chart. Ask clarifying questions to be sure you understand the points being made.

SESSION EVALUATION	
___ 25% ■ ___ 50% ■ ___ 75% ■ ___ 90%	
<u>Highlights</u>	<u>Things to Improve</u>



3. **Thank participants who gave specific feedback, both positive and critical**, and emphasize that it will help you improve future sessions.

Closing Discussion—15 minutes

4. **Conduct a closing discussion:** Close the workshop series by asking participants to share one or more of the following:
 - Something they are taking away from the workshop series.
 - A "thank you" to a particular participant who has made the series meaningful for them.
 - At least one way they will use the information and knowledge gained in the future.

- Something they will miss about the group or the training.
5. **Discuss future plans:** As planned with your host organization, discuss future plans to support consumers in their role as supervisors and employers of personal assistants. If agreed to, invite suggestions for future activities from participants.
 6. **Share contact list:** If agreed to ahead of time, distribute contact information of participants, so people can stay in touch with each other.
 7. **Thank everyone:** In your own words, share what teaching the workshop has meant to you and what you've been given by all of the participants. Express your gratitude for the involvement, and honor their work.
 8. **Send participants off with good wishes and homework:** Wish participants well in their efforts to apply the skills and understandings they've gained at the session. Encourage them to practice the skills, and to remember that their skills will improve with practice!
 9. **Celebrate** the end of the workshop series.

❖ **Teaching Tip**

A celebration could include any of the following ideas:

- Invite individuals (beforehand) to share a special talent (song, dance, speech) to commemorate the series.
- Have a party with sparkling cider, cake, music, etc.
- Allow time for networking and socializing, time for people to exchange phone numbers and plans.
- Purchase and distribute small gifts for participants.
- Write individual notes to participants (make sure that if you write for one, you write for all).
- Create and give out graduation certificates; consider including: participant names, instructor names, dates, accomplishments, number of hours in the training series, name of the series, location, etc.