Planning for
children and young
persons in care

PLANNING FOR CHILDREN AND YOUNG PERSONS IN CARE

PLANNING MEETINGS
PART ONE
A TRAINING GUIDE

DEPARTMENT OF SOCIAL WELFARE

This training guide, which forms part of the
Planning for Children and Young Persons in
Care training programme, is produced by:

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INTRODUCTION

This training guide is written and prepared for trainers in District Offices. It is to be used with social workers and senior social workers to increase their knowledge about planning meetings, their organisation and facilitation.

There are two parts to this training guide. Part 1 deals with the background knowledge that leads to Part 2, the skills-development component of the series. Part 1 contains resource material for 'in-house' training programmes conducted by District Office internal trainers. Part 2 will be conducted at training centres or regionally organised locations by external trainers. These external trainers will come from a network of trainers who will be specially prepared to take on the role. Details about this network will be circulated when the training resources for Part 2 are completed. This booklet is Part 1 of the training guide.

The diagram below will illustrate the components of this training guide and the relationship between the two parts.

PART	CONTENT	LOCATION	TRAINERS	PARTICIPANTS
1	Knowledge	District Office	Internal	Same Office
2	Skills	Training Centres/ Regional Locations	External	Different Offices

This training guide forms part of a continuing social work education series about planning procedures. Its intention is to review current practices and to suggest an approach that may be taken in the future. Eventually, the material developed from this and other sources will be used as learning material for newly-appointed social workers. You are helping to develop this material.

Later on in this guide, you will find some suggestions as to how you can be a contributing resource person in continuing the development of training resources for social work training in this Department.

OBJECTIVES

At the completion of Part 1 of this training guide, the social worker should be able to:

(a) identify a list of activities pertinent to the preparation for a planning meeting,

(b) become aware of both task and maintenance activities in meetings,

(c) identify a list of activities pertinent to the beginning and ending stages of a planning meeting.

SOME BASIC CONCEPTS

In your role as a trainer/facilitator, you have the opportunity to help social workers expand their knowledge about planning meetings. Additionally, you have the task of helping them make links between what they learn and how they put their learning into practice.

This section is written to provide the background to some basic concepts underlying the activities in this guide. It will provide the framework from which these activities may be explained.

A. WHAT IS A PLANNING MEETING?

One of the principles of the planning process is to 'actively involve the child/young person and significant others' in every stage of the process. The assumption is that if these persons are actively involved from the earliest stage, the commitment to the formulation and implementation of the case plan will be significantly increased.

How then do you involve them actively?

In what ways can we include them in the process and provide them with opportunities to exercise their legitimate rights in having some control in determining their future?

One way of doing this is to organise a gathering of these people at some stage of the process. It is not the only way; nor is it the most convenient way. However, it may be an economical and effective way. It is economical in that it saves efforts in conveying messages/statements to different individuals at different places and at different times and in making decisions through these indirect means. This gathering is effective in that it provides an opportunity for the child/young person and all significant others to express their feelings in one another's presence. By ensuring this process occurs, the risk of being misreported or misinterpreted through either oral or written reports is minimised.

By contracting to complete specific tasks, individuals become accountable to their fellow participants at the gathering. Since all are involved, the commitment to task completion is increased, and the consequences of not completing tasks are clear to all.

For many participants a gathering of this kind may be the first experience they have had in making decisions that affect their future. This can give participants a sense of involvement and control in determining the course of their lives.

In the planning process, this gathering has taken on the name of 'planning meeting'.

What then is a planning meeting?

In an attempt to derive such a definition, ten different offices round the country were requested to provide their office's definition. As expected, ten different definitions were received. On closer examination, there are common themes among the ten definitions.

These were:

* a gathering of the child/young person and significant others, DSW social workers and other professionals.

* an opportunity to

  - review progress.

  - plan and make realistic time-limited decisions relating to the CYP's present and future needs.

  - become committed to and be accountable for the implementation of the plan.

Later on in this guide, you will have an opportunity to facilitate your office's definition of a planning meeting.

In this section, we have considered one principle of the planning process, the rationale for the gathering. We have also examined some definitions of the term "planning meeting".

B. A STRUCTURE FOR UNDERSTANDING THE PLANNING PROCESS

The planning process can be understood by considering its _phases_. Using the planning meeting as the reference point three phases emerge.

The three phases are:

    (i) Pre-meeting phase

   (ii) Meeting phase

 (iii) Post-meeting phase.

These phases have activities that can be grouped as shown in the following table.

PHASE	NATURE OF ACTIVITIES
Pre-meeting	Preparation for a meeting
Meeting	Active participation
Post-meeting	Follow-up to the meeting

OR
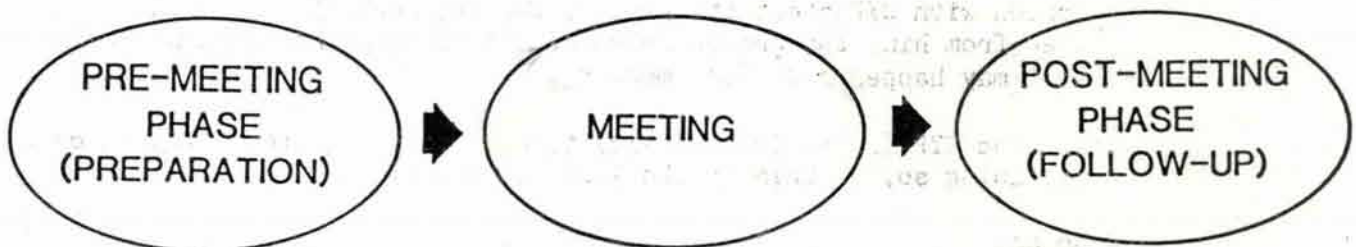
The details of each phase will be covered in later activities.

However, there is an assumption that needs to be discussed by participants before they proceed to identify the activities in the pre-meeting phase.

THE PRE-MEETING PHASE
ASSUMPTION

Adequate preparation
of all participants before a
planning meeting and the provision
of a safe and comfortable environ-
ment are <u>necessary pre-conditions</u>
for an effective planning
meeting.

The issues that will be discussed are:

<u>Adequate Preparation</u>

The Concise Oxford Dictionary describes adequate as meaning sufficient, proportionate to the requirements. Adequate preparation is therefore achieved when the requirements have been identified and met.

In one office a checklist of essential activities (requirements) in the 'Pre-meeting phase' is compiled, and a social worker's preparation is deemed adequate when the activities are completed. The question of the <u>quality</u> of the preparation is then a subject of discussion in the subsequent supervision session. This checklist provides the structure for one such supervision session.

For example, adequate preparation with the child/young person could include:

A. active involvement of the child/young person in the assessment of strengths and needs,

B. discussion with CYP about the reasons for the meeting, what will be expected from him, the ground rules of the meeting, who will be present and what may happen after the meeting,

C. helping the CYP (if in foster care) to come to terms with being in care and remaining so, if this is the likely outcome,

    and so on.

A similar checklist for the preparation with significant others, other professional participants, the chairperson and so on can be compiled.

Safe and comfortable environment

$$Safe \longrightarrow Feelings$$
$$Comfortable \longrightarrow Physical$$
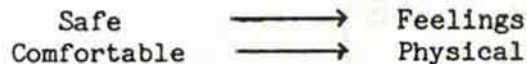
The provision of a <u>safe environment</u> enables participants attending the meeting to meet with each other in the knowledge that they are able to express their feelings openly and have their comments treated with respect.

For example, during the pre-meeting phase, acknowledgements of participants' contributions in a non-judgmental manner will create an impression that the planning meeting will be a safe place to express feelings.

The provision of a <u>comfortable environment</u> enables participants to complete the components of the case plan in surroundings that minimise physical discomfort.

For example, the choice of sufficient and comfortable seating (and in some cases the arrangement of the seating) assists all present to be attentive and involved in the meeting.

Effective Meeting

The planning meeting is effective if the participants are actively involved in determining the various components of the case plan (SW 515) and are committed to implementing them within the specified period. For some social workers, the degree of participation, the 'energy' level of participants and the 'after the meeting' feelings are some indicators of the effectiveness of the meeting. For many others, the <u>measurable</u> outcomes after the meeting may be considered better indicators. In most cases, it is the combination of both tangible and intangible indicators that will help to determine effectiveness.

C. STAGES OF A PLANNING MEETING

The activities of most planning meetings go through four different stages in sequence:

  (i) Tuning-In (Remote and Immediate)

  (ii) Beginning

  (iii) Work

  (iv) Ending (Remote and Immediate)

1. Remote Vs Immediate

The terms 'remote' and 'immediate' are used to distinguish between those activities that are performed <u>outside</u> the physical setting of the meeting place and those occuring <u>inside</u>. For example, sending a letter of invitation to attend a meeting can be seen as a <u>remote tuning-in</u> activity, and greeting the participants as they enter the room for the meeting as an <u>immediate tuning-in</u> activity. Similarly, saying 'thank you for taking part in this meeting' is an <u>immediate ending</u> activity as against 'sending a copy of the case-plan to all participants' in the <u>remote ending</u> stage.

2. The Three Phases Vs the Four Stages

The terms 'phase' and 'stage' are used frequently in this guide and the need to distinguish the difference between these two terms is desirable. The term 'phase' is used primarily to indicate the sequence of events in the overall planning process and the planning meeting is used as the reference event. Thus we have the three phases 'pre-meeting', 'meeting' and 'post-meeting'.

However, the term 'stage' is used to indicate the various sequential sets of activities in the actual meeting itself and they are the tuning-in, beginning, work and ending stages.

The next diagram will illustrate the relationship between these two terms:

THE RELATIONSHIP BETWEEN THE PHASES AND STAGES
OF PLANNING MEETINGS
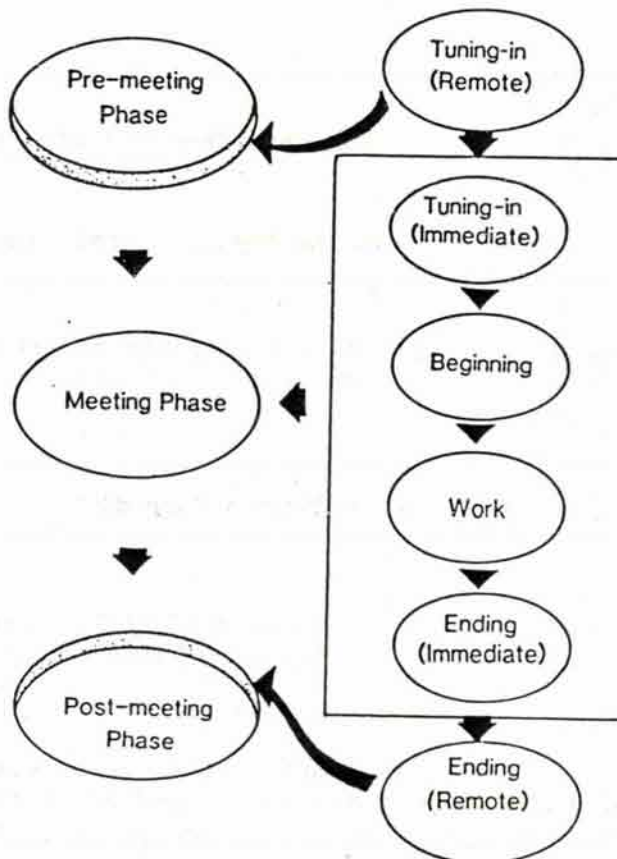
3. The Stages of a Planning Meeting

The concepts in the following sections are drawn from the ideas of William Schwartz from his article 'On the Use of Groups in Social Work Practice'.

a. (i)   Tuning-In (Remote)

This is the stage immediately before the planning meeting in which participants ready themselves to enter the planning meeting. For social workers, remote tuning-in can be perceived as 'preliminary empathy' - the attempt to identify how participants will experience the planning meeting. For example, social workers organising a planning meeting for a child in care may make an assumption at this stage that it is likely that the natural parents will request that the child be returned to their care. This assumption will be validated or otherwise during the meeting. By unearthing possible themes at this stage, the social worker is doing what we term 'remote tuning-in'.

Specific tasks of this stage may also include mentally and physically preparing oneself for the meeting, confirming the time and location, refreshing one's knowledge of particular aspects of the case, acknowledging hopes and fears held for the meeting, etc.

(ii)   Tuning-In (Immediate)

This stage occurs at the outset of the meeting and from the time the first participant enters the meeting room.

At this stage, attention is centred on ensuring that the environment is safe and comfortable.

Specific tasks include greeting and welcoming participants on arrival, ensuring participants' physical comfort, providing ice-breaking activities and offering cups of tea/coffee, etc.

b. Beginnings

This stage begins when everyone has arrived and is comfortably seated. The meeting now confirms clearly its purpose and the conditions under which it will proceed.

Specific tasks include acknowledging participants' attendance, establishing why they are meeting, establishing time limits and ground rules for the meeting, checking with participants that the format and ground rules are acceptable and that they are ready to proceed, acknowledging potential conflicts between participants, etc.

c. <u>Work</u>

This stage is related to the primary task, the completion of the case plan (SW 515).

Assuming the previous stages have been completed, the participants address themselves to the job ahead.

Specific tasks include negotiating to find the common ground, challenging obstacles to the completion of the tasks, contributing ideas, feelings, perceptions that are useful in resolving difficulties, defining the requirements and limits inherent in the task, etc.

d. (i)   <u>Endings (Immediate)</u>

This stage follows the work stage. It may commence in a number of ways, for example, when the plan is completed to everyone's satisfaction or when the agreed time is reached. In some cases the endings may begin when there is a complete breakdown of interaction and when no agreement is reached or by mutual agreement that this is as far as members wish to go at this meeting.

Specific tasks include checking everyone is ready to stop, summarising the content and process, making sure everyone is happy with and accepts the tasks, thanking everyone for coming and participating, etc.

(ii)   <u>Endings (Remote)</u>

When everyone has departed from the meeting place, the activities in the remote ending stage commence.

Specific tasks may include tidying up the place, returning any audio-visual aids used, providing feedback on how the meeting was conducted, writing-up the case plan, etc.

(<u>NOTE:</u>   The list of specific tasks of some of the stages will be
             identified in one of the activities in the training guide.)

D. TASK AND MAINTENANCE ACTIVITIES OF MEETINGS

A planning meeting could be seen as having two main functions:

(i)   to perform the task of completing the case plan (SW 515) and

(ii)   to ensure that the participants are actively involved in the
       process, and that this collaborative relationship is maintained
       during and after the meeting.

In order to fulfil the above functions effectively, are there specific
behaviours that may enhance this process?

If so, what are these specific behaviours?

Several models of group leadership behaviour were examined and the one that
appears to provide a suitable framework is the 'task/maintenance
activities' approach (see 'Distributed-Action Theory of Leadership').

The 'task/maintenance activities' approach takes the view that a meeting
has at least two basic objectives:

-    to complete a task and

-    to maintain effective collaborative relationships among
     the members.

In order to meet these two objectives, the participants in the meeting have
to perform certain activities. These activities are known as the 'task
activities' and 'maintenance activities'.

Essentially, 'task activities' are defined as 'those specific behaviours
that facilitate the completion of the task in the meeting' and 'maintenance
activities' as 'those specific behaviours that keep/maintain a meeting in
good working order'. (The list of task and maintenance activities is given
later on in the training guide).

In addition, the term 'leadership' is defined as 'the performance of acts
that help the group to complete its task and to maintain effective working
relationships among its members'. This approach does not see one or two
persons having exclusive rights to lead the group but suggests that 'any
member of the group may become a leader by taking actions that help the
group complete its task and maintain effective collaborative
relationships'. The implications of this last statement are enormous and
call into question established patterns of leadership behaviours in
planning meetings. For example,

Is the senior social worker the most appropriate person to be chairperson?
(i.e. the issue between status and role).

What is the potential use of the concept regarding co-leadership and how do
we define the roles in this format?

Can foster parents take on some of the leadership functions and when is it
appropriate for this to take place?

HOW TO USE THIS GUIDE

A.   <u>NATURE OF THE TRAINING RESOURCES</u>

In this training guide, you will find a collection of structured exercises, role-plays, handouts and media resources which have been designed to help social workers to increase their knowledge about various aspects of planning meetings. The resources cover a wide range of topics and use a variety of teaching strategies so that they are adaptable to the needs of different groups and the styles of individual trainers.

B.   <u>ADDITIONAL RESOURCES</u>

Many of the activities can be completed in one hour or less. Others required more time and thus can only be used by groups that are likely to meet on a continuing basis. Some of the activities include:

- <u>handouts</u> (which can be photocopied and taken away by participants for future reference and continued learning),

- the use of <u>media resources</u> (which include audiotapes, videotapes and overhead projector transparencies),

- <u>cards</u> (which set scenarios for role-plays).

These additional resources are provided at the end of each activity where they are required. Duplicating masters and photocopies of handouts will be made by the trainers.

For those trainers who are not familiar with the use of <u>pre-recorded</u> media resources, the need to 'run through' the material is essential. It is always useful to preview the material before use. Although instructions for most of the activities assume that they will be used with groups, minor adaptations to the strategies will permit their use with individuals as well. There is no one right way to use these exercises. Change them! Adapt them! Think of your own examples!

C.   <u>Format</u>

The following format is used for all activities and in the following sequence of headings:

<u>TITLE:</u>

This is the descriptive heading which is designed to help the trainer quickly recall the nature of the activity.

<u>OBJECTIVES:</u>

Statements of what the activity intends to achieve.

GROUP SIZE:

The desirable number of participants. For some role-plays, the minimum number of participants is explicitly stated.

TIME REQUIRED:

An approximate time allowance for the activity. This estimation varies according to how much time is spent in the warming-up exercise or the need for discussion on some relevant sub-topics. This estimation of time will be of assistance in your planning of a session involving a series of different activities in the time available for training in your office.

MATERIALS:

A check list of material required to carry out the activity. However, use of additional aids according to group needs and adaptation of an activity to meet these needs is at the discretion of the trainer. A limited number of the <u>media resources</u> will be available for distribution within each region. These can be booked through the Regional Training Supervisor (Social Work). Additional copies may be borrowed from Head Office if existing regional stocks are out on loan.

PROCESS:

Step-by-step procedures to guide the trainer in using the activity. This includes a brief summary of what to say in order to carry out some of the steps.

VARIATION:

Suggestions on how this activity may be used in different ways or in different situations with different groups.

REFERENCES:

A list of reference material for further reading or related activities.

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> *I generally prefer to create my own structured experiences or to modify already existing activities. When reviewing an experience prepared by someone else, I view it as a well-organized and tested idea— which can be modified, adapted, revised, rewritten, or developed to suit my needs. There is no obligation to use an experience exactly as it is written.*

(A quotation from the article 'On Using Structured Experience' by Louis Thayer.)

INTRODUCING PLANNING MEETINGS

ACTIVITY I-1

WHAT IS A PLANNING MEETING ?

OBJECTIVE

To formulate a definition of a planning meeting.

GROUP SIZE

Min. of 6 persons.

TIME REQUIRED

30 minutes.

MATERIALS

1. Audiotape I-1 "What is a Planning Meeting?"
2. Transparency I-1
3. Handouts I-1A, I-1B.
4. Newsprint

PROCESS

1. Introduce the activity by stating the objective and briefly explaining how this could be achieved.

2. Explain that "many social workers have a clear idea of what a planning meeting is, but for many more, the idea is less clear. The need to formulate a definition of a planning meeting is highly desirable. The same situation may well apply to some offices. The purpose of this exercise is to pool our ideas about planning meetings and to arrive at a definition that is acceptable to all social workers in this office and appropriate to the way things are done here ".

3. Project Transparency I-1 and distribute Handout I-1A. Ask participants to complete the open-ended sentence in five minutes.

4. Invite the participants to listen to a recording of three social workers stating their definitions of a planning meeting and play Audiotape I-1.

5. Divide into groups of three and ask members of the group to share their individual definition and to formulate a group definition which should be reported back to the session in ten minutes. The definition should start with "A planning meeting is ...."

6. Write each definition on the newsprint and reach agreement on <u>one</u>
    definition for the office. If this is not possible, then attempt to
    list the <u>common themes</u> from the definitions.

7. (Optional) Distribute Handout I-1B at the end of the session.

REFERENCES

Check Handout I-1B for definitions derived from some District Offices.

WHAT'S NEXT ?

Forward your office's definition(s) to the Social Work Training Unit,
Head Office, which will then keep this in a resource file for reference
by other offices. Use the format as given in Handout I-1A.

DEFINITION OF A PLANNING MEETING

A planning meeting is ....

....

....

....

....

DEFINITIONS FROM SOME DISTRICT OFFICES

A Planning Meeting is a gathering of the child and the significant people in his life, where everyone is given the opportunity to review progress, to vocalise feelings, to plan and realistically make decisions and commitments for the child's future.

A Planning Meeting is an occasion where a child, family, significant people and social workers, having evaluated past and present behaviours, ends with a clear and realistic goal of the future plans for the child.

A Planning Meeting is a gathering of the child (if appropriate) or young person and the significant people in his/her life, where everyone is given the opportunity to plan and realistically make decisions and commitments about the child or young person's future needs.

A Planning Meeting is a gathering of the child and the significant people in his life, where everyone is given the opportunity to plan and realistically make decisions and commitments for the child's future.

A Planning Meeting is a six-monthly meeting of the child and the significant people in the child's life - who are committed to contribute to and be accountable for the making and effecting of a plan for the child's present and future needs.

A Planning Meeting is a gathering of child or young person and significant people in his life, where everyone is given the opportunity to consider where they stand, and realistically and constructively make time-limited decisions and commitments for the child's future.

A Planning Meeting is to formulate projected ideas and guidelines of action to be taken over the next 6 months for all parties involved with the child in care. There should be clarification of thinking and of how the goal should be achieved with particular attention to obtaining agreement by mutual consent where possible.

TRANSPARENCY I-1

<div style="border: 2px solid black; padding: 20px;">

DEFINITION OF A PLANNING MEETING

A planning meeting is ....

....

....

....

....

</div>

ACTIVITY I-2

THE THREE PHASES OF PLANNING

OBJECTIVES

1. To identify the three phases of planning.
2. To understand the assumption determining the activities in the pre-meeting phase.

GROUP SIZE

Minimum of 3 participants

TIME REQUIRED

One hour.

MATERIALS

1. Audiotape I-2 "The activities in the pre-meeting phase."

2. Transparency I-2 plus overlay, transparency I-2B.

3. Handout I-2

PROCESS

1. Introduce the activity by stating the objectives of this session and explain briefly how these would be achieved.

2. Project Transparency I-2. Explain that the activities carried out by social workers in the Planning for Children and Young Persons in Care programme can be structured into three phases. Using the planning meeting as the reference point three phases emerge:

> The Pre-Meeting Phase
> The Meeting Phase
> The Post-Meeting Phase

3. Project Overlay 1. Explain how the activities in each phase can be grouped as 'preparation for a meeting' in the pre-meeting phase, 'active participation' in the meeting phase and 'follow-up to the meeting' in the post-meeting phase. The specific activities in each phase will be identified in later sections of this guide.

4. Audiotape I-2 consists of brief responses by various social workers to the question "Why are the activities in the pre-meeting phase important for planning?". Play Audiotape I-2 and facilitate a brief discussion about participants' reactions to the comments in the tape.

5. Project Transparency I-2B. Read out the ASSUMPTION statement and ensure that participants are given an opportunity to discuss various aspects of this assumption. Divide into groups of three and ask each group to spend ten minutes preparing a report on each of the following topics:

   (a) adequate preparation
   (b) safe and comfortable environment
   (c) an effective meeting.

   The following questions may be useful:

   (a) What do you mean by 'adequate'? How do you know your preparation is adequate?
   (b) What is a safe environment?
   (c) What is a comfortable environment?
   (d) How do you know the meeting is effective? What measures do you use to gauge this effectiveness?

6. Write down the main points of each group report. In your summary, you may want to add other points to this list.

7. Distribute Handout I-2 at the end of the session.

THE PRE–MEETING PHASE ASSUMPTION

PRE-MEETING PHASE ▶ MEETING PHASE ▶ POST-MEETING PHASE

THE PRE-MEETING PHASE ASSUMPTION

Adequate preparation
of all participants before a
planning meeting and the provision
of a safe and comfortable environ-
ment are necessary pre-conditions
for an effective planning
meeting.

TRANSPARENCY I-2A

THE THREE PHASES

| PRE-MEETING PHASE (PREPARATION) | → | MEETING | → | POST-MEETING PHASE (FOLLOW-UP) |
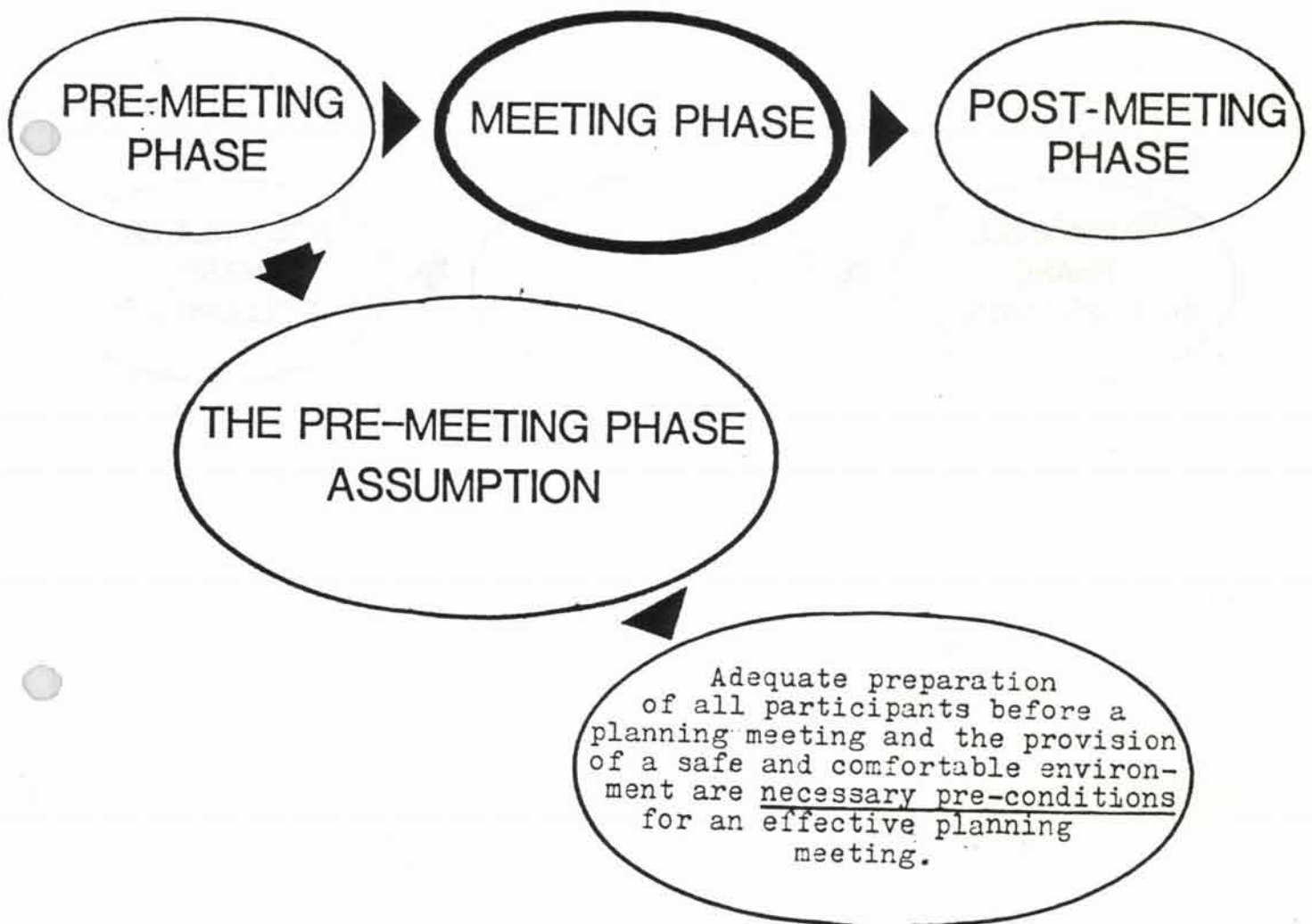
TRANSPARENCY I-2A (OVERLAY 1)

PHASE	NATURE OF ACTIVITIES
Pre-meeting	Preparation for a meeting
Meeting	Active participation
Post-meeting	Follow-up to the meeting

TRANSPARENCY I-2A (OVERLAY 1)

THE PRE-MEETING PHASE ASSUMPTION

PRE-MEETING PHASE ▶ MEETING PHASE ▶ POST-MEETING PHASE

THE PRE-MEETING PHASE ASSUMPTION

Adequate preparation of all participants before a planning meeting and the provision of a safe and comfortable environment are _necessary pre-conditions_ for an effective planning meeting.
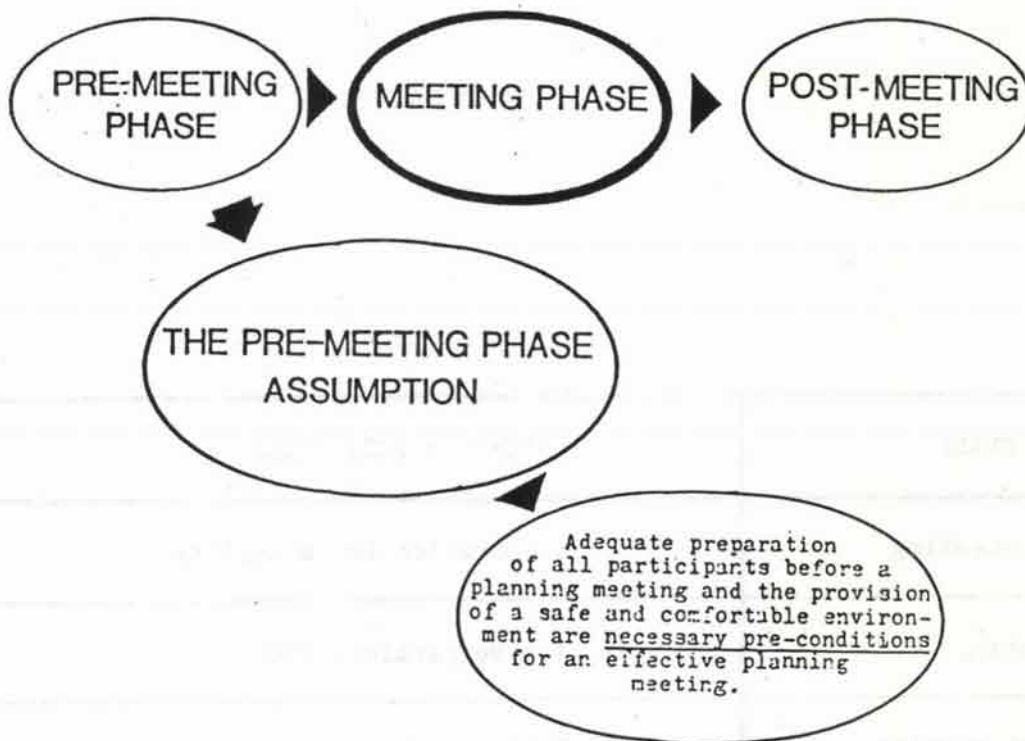
ACTIVITY I-3

PREPARING FOR A PLANNING MEETING

OBJECTIVE

To list a set of activities pertinent to preparing for a planning meeting.

GROUP SIZE

Minimum of 6 participants

TIME REQUIRED

One and a half hours.

MATERIALS

1. Videotape I-3 "Activities in the pre-meeting phase - a social worker's viewpoint".

2. Audiotape I-3 "Activities in the pre-meeting phase - a social worker's viewpoint". (an equivalent soundtrack of Videotape I-3)

3. Transparencies I-3A and I-2B

4. Handout I-3

PROCESS

1. Introduce the activity by stating the objective of this session and explain how this will be achieved.

2. Project Transparency I-2B and summarise the three phases of planning by referring to the diagram and stating the assumption covered in Activity I-2.

3. Explain that Ann Corcoran, Senior Social Worker (Adoptions and Fostering), from Head Office is the speaker in the Videotape (or Audiotape version) and that she outlined the numerous activities in the pre-meeting phase. Play Videotape I-3 (or Audiotape I-3).

4. Project Transparency I-3A and explain that the numerous activities mentioned by Miss Corcoran may be grouped into different and separate headings as shown on the screen. Read each of the headings in turn and check that each heading is understood by each person. It may be necessary to explain that 'significant others' includes birth parents, foster parents, relatives or anyone who may be actively involved in the formulation of the case plan. However, not all of these persons need to be present at the planning meeting.

5. Using the SOCIAL WORKER'S CHECKLIST section, form groups of three and allocate a topic heading to each group. Ask each group to:

    (i)   appoint a person who will report back to the session,

    (ii)   list the essential activities for the social workers under their chosen heading and write these on the paper provided, and

    (iii)   complete this task in half-an-hour.

    (NOTE: For some headings, the need to identify the target group is desirable. For example, who are the significant others? other professional participants? and so on.

                The group tackling the heading 'preparation of a safe and comfortable environment' would need to explain what is meant by the terms safe and comfortable.)

6. Invite each group to pin their newsprint on the wall and ask the appointed person to explain the activities. This explanation need not be too detailed and do not invite questions from other participants until each group has completed their report. Facilitate a discussion.

7. Distribute Handout I-3 and ask participants to compare this list with their list under the respective headings. Check if there are any missing items on either of the lists and whether those missing items are relevant to the way things are done in the office.

8. Complete this session by referring to the assumption made in Activity I-2 (Project Transparency I-2) and invite participants to consider:

    (i)   In view of the exercise just completed, whether this assumption is still relevant?

    (ii)   What would happen in a planning meeting if there is a lack of adequate preparation with the participants? Invite participants to discuss any recent experiences where there was adequate preparation and where there was inadequate preparation.

VARIATION

1. If there are insufficient participants to form the necessary number of groups to match each heading, then discuss the appropriate number of headings over a few sessions.

WHAT'S NEXT ?

Please forward your copy of the SOCIAL WORKER'S CHECKLIST to the Social Work Training Unit (Head Office) in order to update information in this guide and to keep in a resource file for reference by other offices.

(This activity is inspired by a similar activity conducted in Papakura and Palmerston North offices).

<u>Reminder</u>:

1.   The above checklist is not <u>exhaustive</u>. It merely serves as a
      tentative list to aid discussion in your session.

2.   Please forward a copy of your SOCIAL WORKER'S CHECKLIST to the
      Social Work Training Unit (Head Office) to:

            . update of information in this checklist

            . keep in a resource file for reference by other offices.

LIST OF ACTIVITIES IN THE PRE-MEETING PHASE

The activities in the following checklist are not arranged in any fixed order. Your task is to compile a personal checklist appropriate to the approach to planning meetings adopted by your office/team.

(A) PREPARATION OF ONESELF

Check who is going to be at the meeting and anticipate their feelings and ideas.

Identify possible areas of conflict/agreement. Tentatively consider how these would be handled.

Discuss with Senior Social Worker and/or other staff members (if appropriate) for:

. feedback about preconceived ideas;
. feelings (positive and negative) towards child, family and significant others;
. practical realities of what you can do with this family and child;
. choice of chairperson;
. ground rules for the meeting.

Giving yourself sufficent time before meeting to:

. prepare yourself;
. prepare everyone else;
. attend to your presentation.

(B) PREPARATION WITH CHILD/YOUNG PERSON

Get to know the child/young person well to identify their needs and know their feelings.

Help the child/young person to:

. know why s/he is in care,
. clarify his/her own feelings and ideas about meeting,
. know exactly who will be present and their role in the meeting,
. determine the significant people in his/her life,
. know if s/he is in foster care or long term care, what it means to be in care, his/her rights as an individual while in care and how to come to terms with being in care.

(C) PREPARATION WITH SIGNIFICANT OTHERS

WITH NATURAL PARENTS AND SIGNIFICANT OTHERS

. getting feelings resolved about reasons for child being in care,
. getting feelings and tentative ideas about goals, nature of tasks to re-establish parenting role, commitment to and realism of goal/tasks,
. clarify role in meeting and discuss who will be present, suggest groundrules and purpose of the meeting.

WITH FOSTER PARENTS (if applicable)

. getting feelings and tentative ideas about goals, nature of tasks and commitment to tasks,
. encourage 'team approach' and what this means in practice,
. clarify role at meeting and know exactly who will be present, suggest groundrules and purpose of meeting,
. explore specific role that foster parents may take on during meeting.

(D) PREPARATION WITH OTHER PROFESSIONALS

Explain and clarify the 'planning process', the purpose and groundrules of the meeting.

Clarify their role at the meeting (if their presence is necessary at meeting).

| Sharing information that aids the formulation of the case plan. |
| Explain that they may be asked to commit themselves to some tasks during the meeting. |

(E) PREPARATION OF A SAFE AND COMFORTABLE ENVIRONMENT

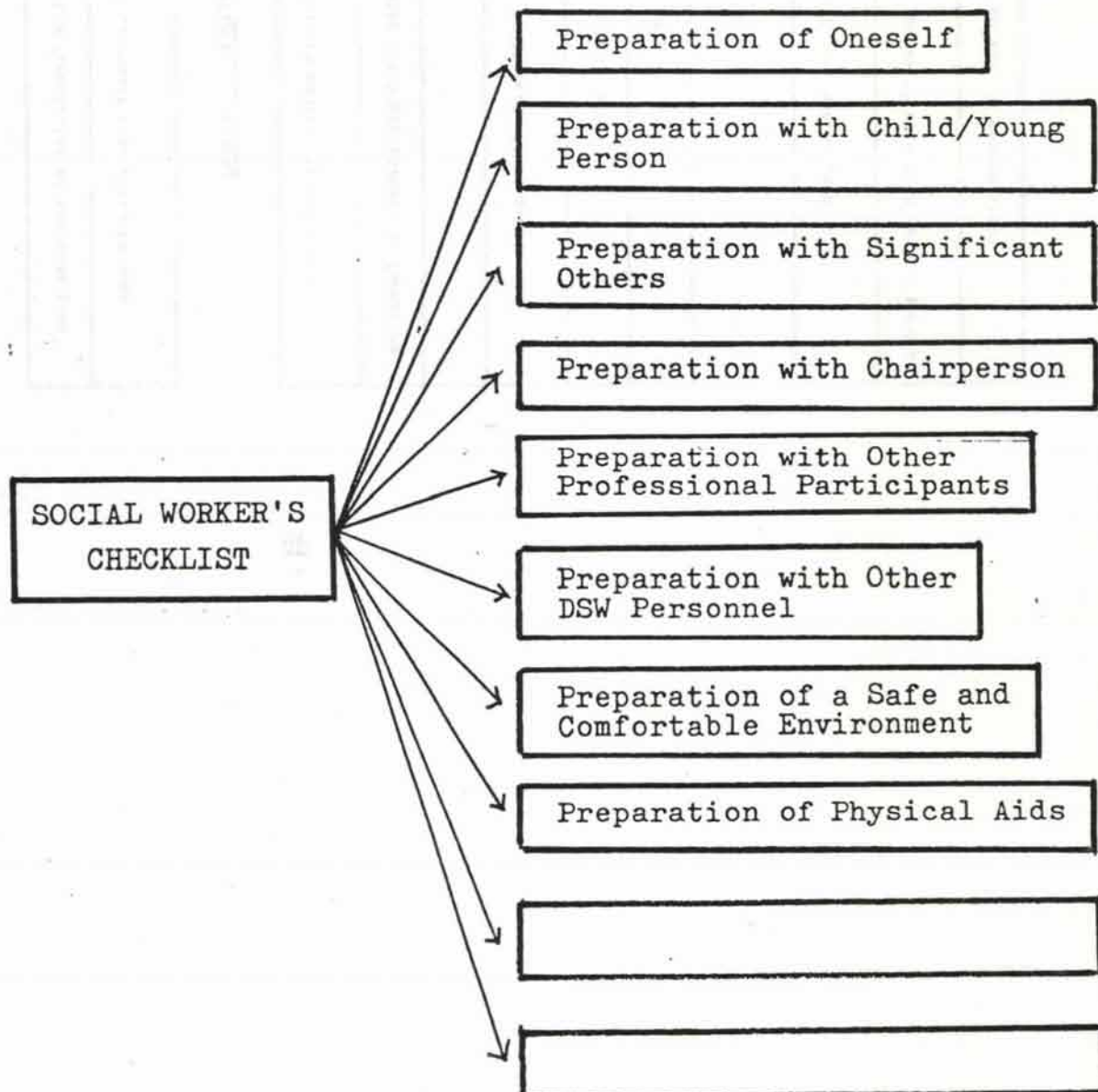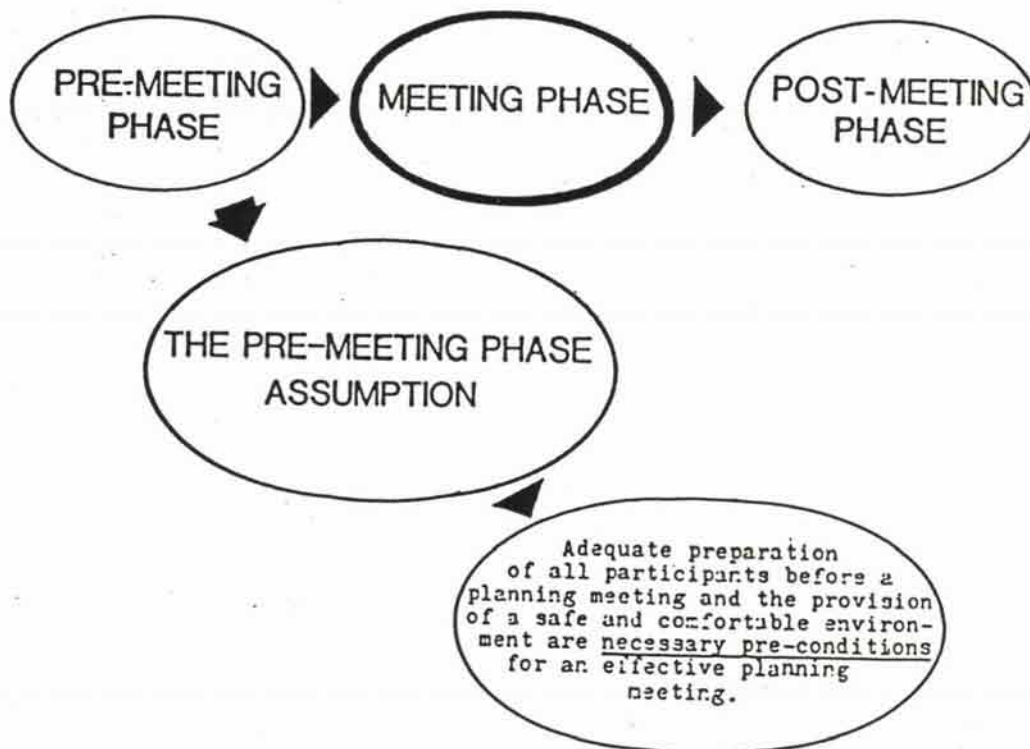| Select and book a venue that ensures neutrality and a non-threatening atmosphere. |
| Ensure sufficient and comfortable seating/placement of furniture. |
| Arrange appropriate seating. |
| Arrange for children's special needs (e.g. toys, games, paper and pencil). |
| Availability of tea/coffee (if appropriate). |
| Ensure comfortable temperature of room. |

(F) PREPARATION OF PHYSICAL AIDS

| Get white board/black board/newsprint, marker pens, chalk, blue-tac etc. |
| If appropriate, get additional copies of case plan, school report, institution report and etc. |
| Get photographs of child/young person (if appropriate). |

TRANSPARENCY I-3A

CHECKLIST OF ACTIVITIES IN THE PRE-MEETING PHASE

```
                                    ┌─────────────────────────────┐
                                    │  Preparation of Oneself     │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation with Child/Young│
                                    │  Person                     │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation with Significant│
                                    │  Others                     │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation with Chairperson│
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation with Other     │
                                    │  Professional Participants  │
┌──────────────────┐               └─────────────────────────────┘
│ SOCIAL WORKER'S  │               ┌─────────────────────────────┐
│   CHECKLIST      │               │  Preparation with Other     │
└──────────────────┘               │  DSW Personnel              │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation of a Safe and  │
                                    │  Comfortable Environment    │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │  Preparation of Physical Aids│
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │                             │
                                    └─────────────────────────────┘
                                    ┌─────────────────────────────┐
                                    │                             │
                                    └─────────────────────────────┘
```

THE PRE-MEETING PHASE ASSUMPTION

PRE-MEETING PHASE ▶ MEETING PHASE ▶ POST-MEETING PHASE

THE PRE-MEETING PHASE ASSUMPTION

Adequate preparation
of all participants before a
planning meeting and the provision
of a safe and comfortable environ-
ment are necessary pre-conditions
for an effective planning
meeting.

FACILITATING PLANNING MEETINGS

ACTIVITY II-1

PATTERNS OF GROUP LEADERSHIP BEHAVIOUR

OBJECTIVE

To identify patterns of group leadership behaviour of each participant.

GROUP SIZE

Minimum of four persons.

TIME REQUIRED

1. Pre-session tasks (half-hour)
2. In-session (one hour)

MATERIALS

1. Transparencies II-1A and II-1B
2. Handouts II-1A, II-1B and II-1C
3. Newsprint

PROCESS

A. Pre-session tasks (Part 1)

　　1.　Distribute Handout II-1A and ensure that each participant completes the exercise before the session.

　　2.　Distribute Handout II-1B when Handout II-1A is returned by each participant. This article must be read before the session.

　　3.　Assure the participants that the scores in the questionnaire will not be read by you and that it will be returned to them during Part 2 of the exercise.

B. In-session (Part 2)

　　1.　State the objective of this session and briefly explain how this will be achieved. Project Transparency II-1A and summarise the main points of Handout II-1B.

　　2.　Distribute Handout II-1A back to each participant together with Handout II-1C. Instruct the participants to commence the scorings.

C. Divide the group into pairs and ask each pair to discuss individual's
   score and placing on the task-maintenance grid. After ten minutes,
   facilitate a group discussion by asking:

   (i)   How do they feel about the exercise?

   (ii)   Are there any comments they would like to share with the
           group about their placing on the grid?

   (iii)   In what ways are they more aware of their leadership
           behaviour in terms of task and maintenance activities?

VARIATION

1. After the paired discussion, Project Transparency II-1B and invite
   each person to read their score. Mark this score on the grid for
   each person and a cluster of scores will emerge on the grid. In
   recent seminars held with Auckland Regional Offices and South Island
   Offices, the patterns on the grid have the following form:

Task-Maintenance Actions Grid

task actions
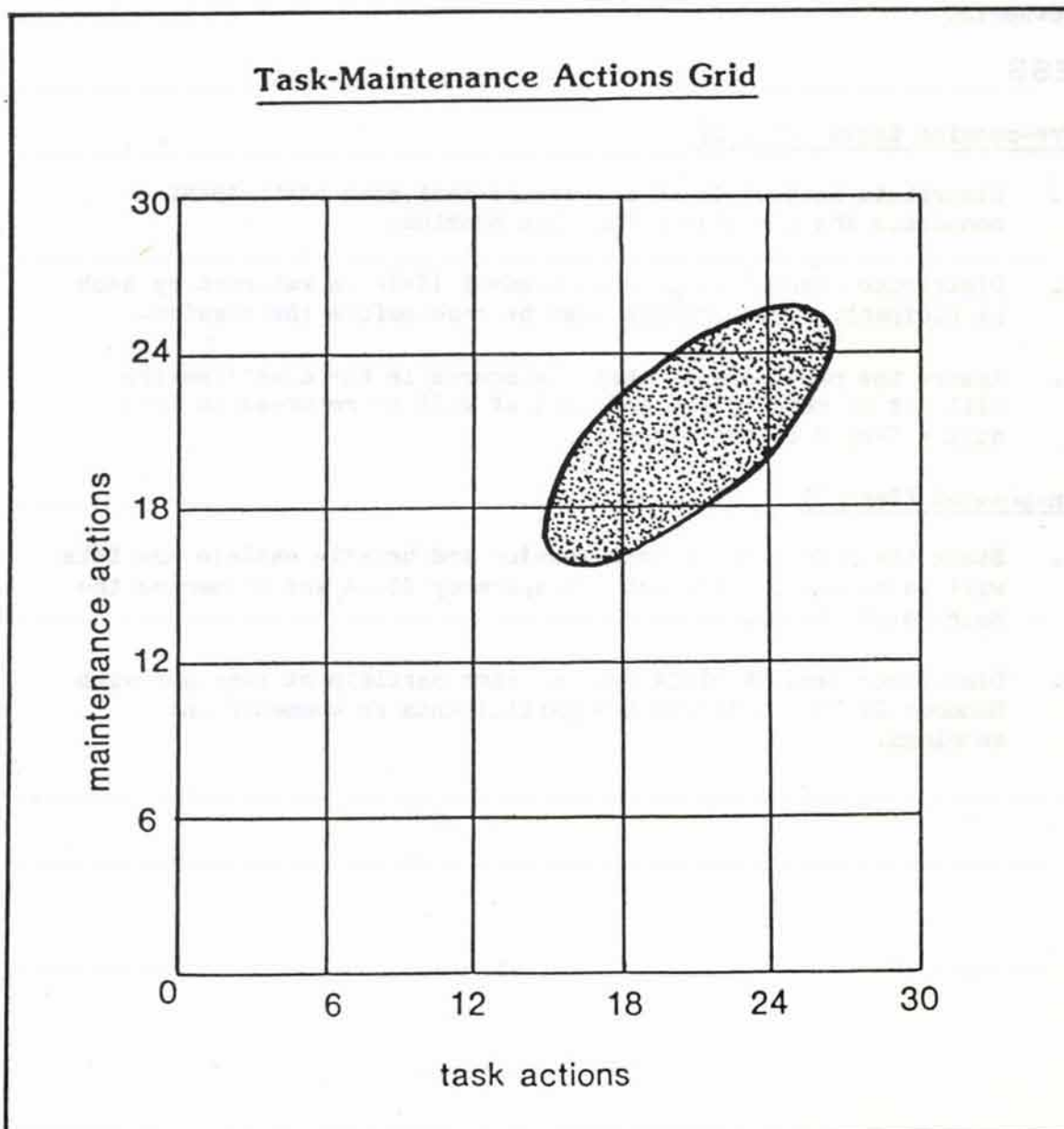
2. Discuss the differences between your office's pattern with that shown
    above.

    Is the pattern shown on your office's grid as expected?

    What does it say about the group leadership pattern of social workers
    in your office?

(This exercise is adapted from Johnson and Johnson 'Joining Together')

HANDOUT II-1A

NAME ....

YOUR GROUP LEADERSHIP ACTIONS QUESTIONNAIRE

1. OBJECTIVES:

This exercise has two objectives:

    (i)   to make you more aware of your typical leadership actions; and

    (ii)   to make your group more aware of its patterns of leadership.

2. INTRODUCTION:

Any action that helps a group complete its task is a leadership action. Any action that helps a group maintain effective working relationships among its members is a leadership action.

When you are a member of a group, what leadership actions do you engage in?

How do you influence other group members to complete the task and maintain collaborative relationships?

3. INSTRUCTIONS:

    :   Please write your name on the top right hand corner of this page.

    :   This questionnaire is Part 1 of a two part exercise. It will be returned to you at the beginning of Part 2 and it will not be read by your trainer in the meantime.

    :   Each of the items in the next page describes a leadership action. In the box next to each item write:

    5   if you always behave that way

    4   if you frequently behave that way

    3   if you occasionally behave that way

    2   if you seldom behave that way

    1   if you never behave that way

4. QUESTIONNARIE

```
┌─────────────────────────────────────────────────────────────┐
│                       SCORES GUIDE                           │
│                                                              │
│   5 → always,  4 → frequently,  3 → occasionally,            │
│                                                              │
│         2 → seldom  and  1 → never                           │
└─────────────────────────────────────────────────────────────┘
```

When I am a member of a group:

(A)   I propose tasks or goals. I define a group
      problem. I also suggest procedures or ideas for
      solving a problem.

(B)   I warmly encourage all members of the group to
      participate. I am open to their ideas. I let
      them know I value their contributions to the
      group.

(C)   I ask for facts, information, opinions, ideas and
      feelings from the other group members in order to
      help the group discussion.

(D)   I am sensitive to the feelings, moods and
      relationships within the group. I share my own
      feelings with the other group members.

(E)   I offer facts and give my opinions, ideas,
      feelings and information in order to help the
      group discussion.

(F)   I reconcile disagreements and reduce tension
      among group members. I also encourage group
      members to explore their differences.

(G)   I interpret or reflect ideas and suggestions. I
      clear up confusions and indicate alternatives and
      issues before the group.

(H)   When my idea or status is involved in a conflict,
      I offer to compromise. I also admit errors and
      discipline myself to maintain group cohesion.

(I)   I pull together related ideas or suggestions made
      by group members and restate and summarise the
      major points discussed by the group.

(J) I keep communication channels open and facilitate
     the participation of others. I suggest
     procedures for sharing opportunity to discuss
     group problems.

(K) I check to see if the group is nearing a
     conclusion and to see how much agreement has been
     reached.

(L) I express standards for the group to achieve. I
     apply the standards in evaluating group
     functioning and production.

COPY OF HANDOUT II-1B

When you have completed this questionnaire, return it to your trainer.
You will now receive a copy of Handout II-1B "APPROACHES TO LEADERSHIP"
which should be read before the next session.

HANDOUT II-1B

> The following article can be read in ten minutes.
> Please read this before the session.

APPROACHES TO LEADERSHIP

(The material in the following section is a summary of ideas from the
book 'Joining Together' by D.W. Johnson and F.P. Johnson.)

The four major approaches to leadership theory are:

> : trait
> : position
> : style
> : distributed-action.

The trait theory assumes that 'leaders are born and not made' and that a
leader was felt to be someone who had unique, inborn leadership traits.

The second approach is the position theory in which leadership is seen in
terms of the formal role or position which an individual holds in an
organisation or group.

The third approach is based on the work done by Lewin, Lippitt and White
(1939) which examined leadership behaviours in terms of their 'style'.
There are three leadership styles: autocratic, democratic and
laissez-faire. In the autocratic style the leader determines all policy
and gives orders to the group members. In the democratic style the
policies are set through group discussion and decision, with the leader
encouraging and helping the group to interact. In the laissez-faire
style there is very little participation by the leader.

Finally, the fourth approach looks at leadership in terms of the
performance of acts that help the group to complete its task and to
maintain effective working relationships among its members. The
Distributed-Action Theory of Leadership includes two basic ideas:

- any member of a group may become a leader by taking actions that
  help the group complete its task and maintain effective
  collaborative relationships (this will be known as the 'task and
  maintenance activities' approach);

- any leadership function may be fulfilled by different members
  performing a variety of relevant behaviours.

Leadership is specific to a particular group in a particular situation.
Under specific circumstances any given behaviour may or may not serve a
group function. Under one set of conditions a particular behaviour may
be helpful, under another set it may impair the effectiveness of the
group. For example, when a group is trying to define a problem,
suggesting a possible solution may not be helpful; however, when the
group is making various solutions to a defined problem, suggesting a
possible solution may indeed be helpful.

There are at least three reasons why leadership functions should be
distributed among group members. First, if members do not participate,
then their ideas, skills, and information are not being contributed.
The second reason is that members are committed to what they help
build. Members who participate become more committed to the group and
what the group has done. The more members feel they have influenced the
group and contributed to its work, the more committed they will be to
the group. The third reason is that active members often become worried
or annoyed about the silent members and view them as unconcerned about
task completion. Unequal patterns of participation can create
maintenance problems within the group.

The distributed-action theory of leadership is one of the most concrete
and direct approaches available for improving a person's leadership
skills and for improving the effectiveness of the group. People can be
taught the diagnostic skills and behaviours that help a group accomplish
its task and maintain effective collaborative relationships among its
members.

REFERENCE

For a full discussion of the 'Distributed-Action Theory of Leadership',
see Johnson and Johnson 'Joining Together' (New Jersey: Prentice-Hall
1982) pp. 55-58.

HANDOUT II-1C

SCORESHEET (FOR GROUP LEADERSHIP ACTIONS QUESTIONNAIRE)

(a) INSTRUCTIONS:

In Handout II-1A you have completed the Leadership Actions
Questionnaire by writing a number (1 to 5) next to each item
describing a leadership action. You are now required to add up the
scores for each item.

In order to obtain a total score for task actions and maintenance
actions, transfer the score for each item as recorded in the
questionnaire to the appropriate columns in the tables below. For
example, if you scored 3 for Statement (A) "I propose tasks and goals
.............", then put the number 3 in the box next to the
statement "(A) INITIATING". Similarly Statement (B) "I warmly
encourage ...." to "(B) ENCOURAGING" and so on.

(Please note that Statement (B) is in the right- hand table and
statement (C) is back in the left-hand table).

(b) SCORES

TASK ACTIONS	SCORES
(A) INITIATING	
(C) INFORMATION/OPINION SEEKING	
(E) INFORMATION/OPINION GIVING	
(G) CLARIFYING OR ELABORATING	
(I) SUMMARIZING	
(K) CONSENSUS TESTING	
TOTAL	

MAINTENANCE ACTIONS	SCORES
(B) ENCOURAGING	
(D) EXPRESSING GROUP FEELINGS	
(F) HARMONIZING	
(H) COMPROMISING	
(J) GATE-KEEPING	
(L) SETTING STANDARDS	
TOTAL	

ADD UP HERE

(c) TASK - MAINTENANCE ACTIONS GRID

The diagram given below is the Task-Maintenance Actions Grid. Locate
your scores on this grid by finding your total scores for task
actions on the bottom (horizontal) axis and total scores for
maintenance actions on the vertical axis. The intersection of these
two scores is your leadership behaviour indicator point. Put a X on
this point.

[For example, the point X in the grid represents the score of 25 for
task actions and 20 for maintenance actions, i.e. a score of (25,20)]

Task-Maintenance Actions Grid

X (25,20) ←

maintenance actions: 30, 24, 18, 12, 6, 0

task actions: 0, 6, 12, 18, 24, 30
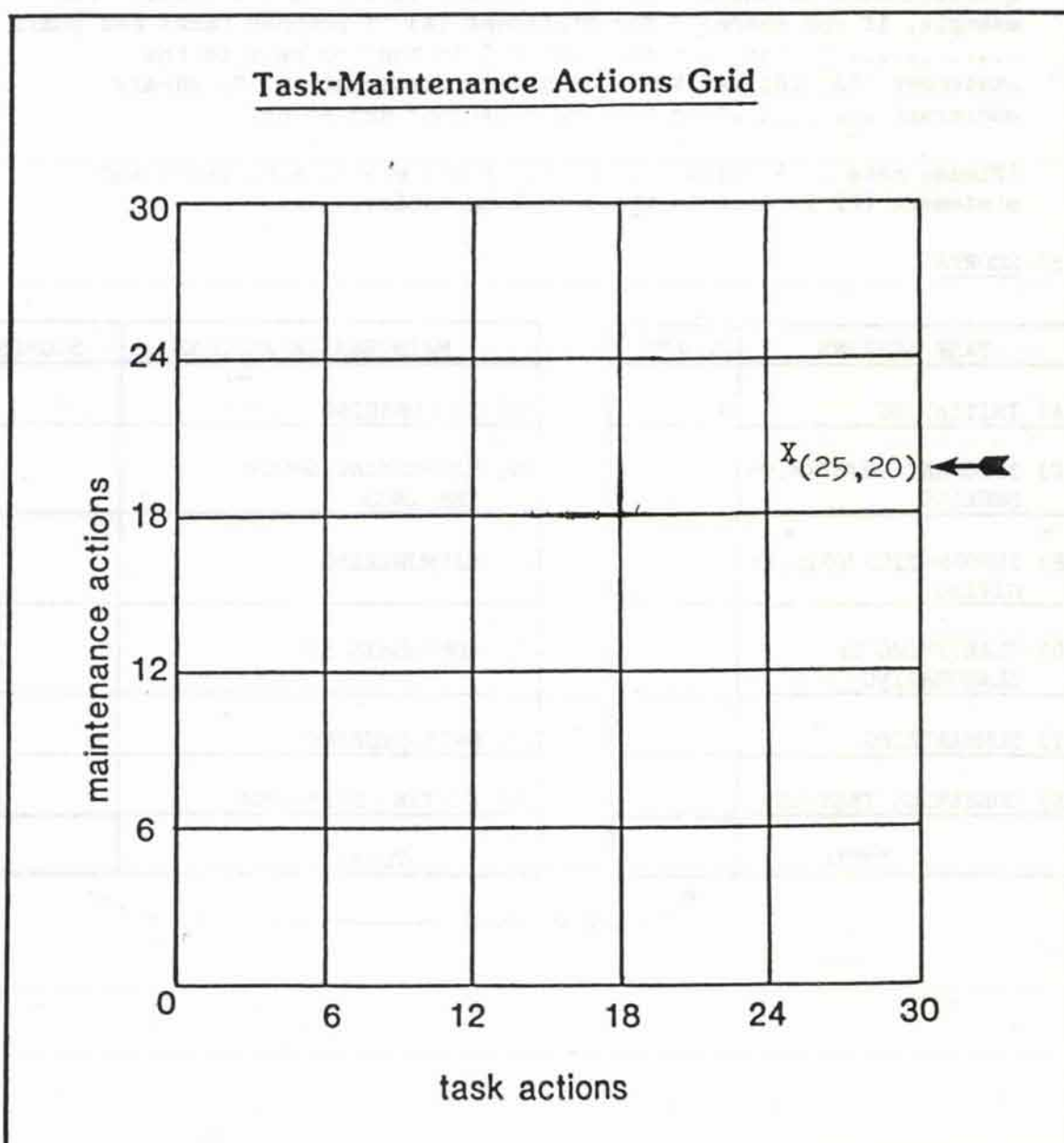
(d) DESCRIPTION OF TASK-MAINTENANCE PATTERNS.

(6,6)   Only a minimum effort is given to getting the required work
        done. There is general non-involvement with other group
        members. The person with this score may well be saying "To hell
        with it all". Or he or she may be so inactive in the group as
        to have no influence whatsoever on other group members.

(6,30) High value is placed on keeping good relationships within the
        group. Thoughtful attention is given to the needs of other
        members. The person with this score helps create a comfortable,
        friendly atmosphere and work tempo. However, he or she may
        never help the group get any work accomplished.

(30,6) Getting the job done is emphasized in a way that shows very
        little concern with group maintenance. Work is seen as
        important, and relationships among group members are ignored.
        The person with this score may take an army-drillmaster approach
        to leadership.

(18,18) The task and maintenance needs of the group are balanced. The
        person with this score continually makes compromises between
        task needs and maintenance needs. Though a great compromiser,
        this person does not look for or find ways to creatively
        integrate task and maintenance activities for optimal
        productivity.

(30,30) When everyone plans and makes decisions together, all the
        members become committed to getting the task done as they build
        relationships of trust and respect. A high value is placed on
        sound, creative decisions that result in understanding and
        agreement. Ideas and opinions are sought and listened to, even
        when they differ from one's own. The group as a whole defines
        the task and works to get it done. The creative combining of
        both task and maintenance needs is encouraged.

APPROACHES TO LEADERSHIP

(A SUMMARY)

FOUR MAJOR APPROACHES TO LEADERSHIP THEORY

: TRAIT - "leaders are born, not made."
           (i.e. unique, inborn leadership traits)

: POSITION - "Who is a leader?" in terms of high
               authority position within organisation.

: STYLE - 'autocratic', 'democratic', 'laissez-faire'.

DISTRIBUTED ACTIONS

. Defines leadership as the performance of acts that
  help the group to complete its task and to maintain
  effective working relationships among its members.

. Any member of a group may become a leader by taking
  actions that help the group complete its task and
  maintain effective collaborative relationships.

. Any leadership functions may be fulfilled by
  different members performing a variety of relevant
  behaviours.

. Leadership is a learned set of skills and anyone
  with certain minimal requirements can acquire.

Task-Maintenance Actions Grid
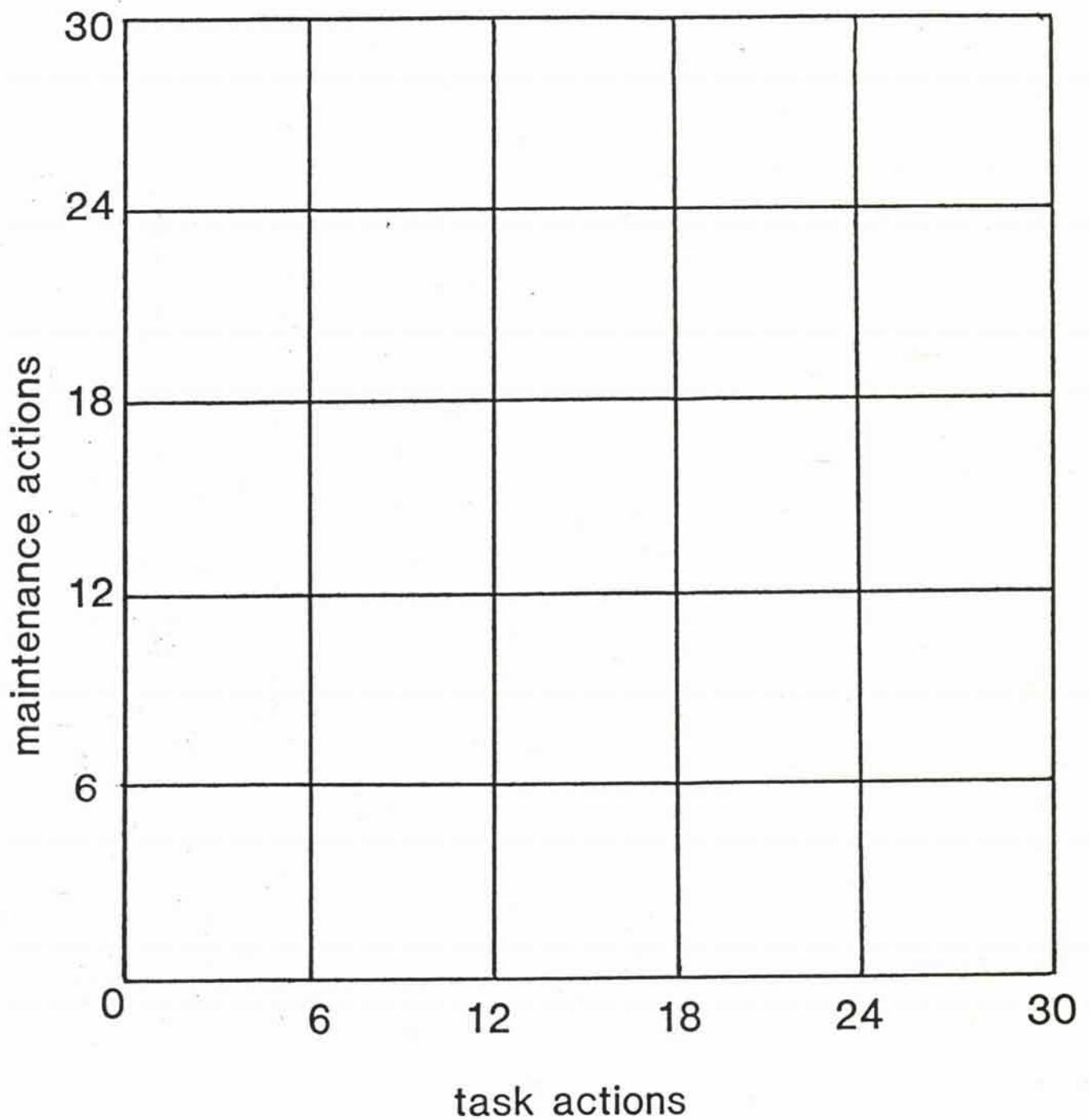
ACTIVITY II-2

TASK AND MAINTENANCE
ACTIVITIES OF MEETINGS (I)

OBJECTIVE

To understand selected task and maintenance activities of meetings.

GROUP SIZE

Minimum of eight persons

TIME REQUIRED

One hour

MATERIALS

1. Handouts II-2A, 11-2B and II-2C
2. Worksheet II-2A
3. Transparency II-2

PROCESS

1. State the objective of this session and briefly describe how it will be achieved.

2. Distribute Handout II-2A 'Task and Maintenance Activities' to participants and elaborate on each activity.

3. Use Worksheet II-2A 'Selecting a City Exercise' for the rest of this session.

4. Distribute Handout II-2C at the end of this session.

VARIATION

For any additional role-plays, you may introduce a mixture of task and maintenance activities. However, the leadership actions of the first envelope should be 'initiating and one other maintenance action' and no more than one task or maintenance action in the other envelopes.

TASK AND MAINTENANCE ACTIVITIES (A SUMMARY)

TASK ACTIVITIES	MAINTENANCE ACTIVITIES
1. Initiating: Proposing tasks or goals; defining a group problem; suggesting a procedure or ideas for solving a problem.	1. Encouraging: Being friendly, warm, and responsive to others; accepting others and their contributions; giving others opportunities and recognition.
2. Information or opinion seeking: Requesting facts; seeking relevant information about a group concern; stating a belief; asking for suggestions or ideas.	2. Expressing Group Feelings: Sensing feelings, moods, relationships within the group; sharing his own feelings or affect with other members.
3. Information or opinion giving: Offering facts; providing relevant information about group concern; stating a belief; giving suggestions or ideas.	3. Harmonizing: Attempting to reconcile disagreements; reducing tension through getting people to explore their differences.
4. Clarifying or elaborating: Interpreting or reflecting ideas and suggestions; clearing up confusion; indicating alternatives and issues before the group; giving examples.	4. Compromising: When conflict is apparent, offering to compromise one's own position; admitting error, disciplining oneself to maintain group cohesion.
5. Summarizing Pulling together related ideas; restating suggestions after the group has discussed them; offering a decision or conclusion for the group to accept or reject.	5. Gate-keeping: Attempting to keep communication channels open; facilitating the participation of others; suggesting procedures for sharing opportunity to discuss group problems.
6. Consensus testing: Sending up trial balloons to see if group is nearing a conclusion; checking with group to see how much agreement has been reached.	6. Setting standards: Expressing standards for the group to achieve; applying standards in evaluating group functioning and production.

OBSERVERS' FORM

INSTRUCTIONS:

1. Write the name of each role-player on the top row as shown.

2. Tally (✓) every time any of the role-players behave in a task or maintenance activity.

NAMES OF ROLE-PLAYERS

TASK ACTIVITIES	INITIATING: gives ideas, proposes a task						
	INFORMATION SEEKING: asks for facts, ideas						
	INFORMATION GIVING: offers facts, ideas, beliefs						
	CLARIFYING & ELABORATING: clears up confusion						
	SUMMARIZING: restates, offers a conclusion						
	CONSENSUS TESTING: checks on group position						
MAINTENANCE ACTIVITIES	HARMONIZING: reduces tension, explore differences						
	GATEKEEPING: facilitates participation of others						
	ENCOURAGING: acts friendly, warm, accepting						
	COMPROMISING: yields status, admits error						
	SETTING STANDARDS: helps set norms, tests limits						
	EXPRESSING GROUP FEELINGS: senses group feelings and mood, shares own feelings						

HANDOUT II-2C

TASK AND MAINTENANCE ACTIVITIES OF MEETINGS

A planning meeting could be seen as having two main functions:

    (i)   to perform the task of completing the case plan (SW 515) and

    (ii) to ensure that the participants are actively involved in the process and that this collaborative relationship is maintained during and after the meeting.

In order to fulfil the above functions effectively, are there specific behaviours that may enhance this process?

If so, what are these specific behaviours?

Several models of group leadership behaviour were examined and the one that appears to provide a suitable framework is the 'task/maintenance activities' approach (see 'Distributed-Action Theory of Leadership').

The 'task/maintenance activities' approach takes the view that a meeting has at least two basic objectives:

    . to complete a task and

    . to maintain effective collaborative relationships among the members.

In order to meet these two objectives, the participants in the meeting have to perform certain activities. These activities are known as the 'task activities' and 'maintenance activities'.

Essentially, 'task activities' are defined as 'those specific behaviours that facilitate the completion of the task in the meeting' and 'maintenance activities' as 'those specific behaviours that keep/maintain a meeting in good working order'. (The list of task and maintenance activities is given later on in the training guide).

In addition, the term 'leadership' is defined as 'the performance of acts that help the group to complete its task and to maintain effective working relationships among its members'. This approach does not see one or two persons having exclusive rights to leading the group but that 'any member of the group may become a leader by taking actions that help the group complete its task and maintain effective collaborative relationships'. The implications of this last statement are enormous and call into question established patterns of leadership behaviour in planning meetings. For example,

Is the senior social worker the most appropriate person to be chairperson? (i.e. the issue between status and role).

What is the potential use of the concept of co-leadership and how do we define the roles in this situation?

Can foster parents take on some of the leadership functions and when is it appropriate for this to happen?

TASK AND MAINTENANCE ACTIVITIES

The following is an initial list of both 'task and maintenance' activities of meetings. The list is not exhaustive as there are other activities relevant to meetings (e.g. energizing, supporting, confronting, role defining and so on). Modifications will be made to this list as more information becomes available about facilitating planning meetings.

TASK ACTIVITIES

1. **INITIATING**

    "Proposing tasks or goals; defining a group problem; suggesting a procedure or ideas for solving a problem".

    Initiating, the beginning contribution to a meeting, is vital at the beginning of a meeting. For example, when the participants in a meeting are settled down, the social worker may say "I'd like to start now by ... " and proceed with the introduction, clarifying and checking with participants as to why they are here and so on. The original initiation is most effective if it comes from the chairperson and one or more members. For example, the social worker may start the meeting and facilitate the introduction and then hand this over to the chairperson for the next part.

    The original initiation may be defining the groups' tasks, or ways of doing the task, or both. It is important that other participants are encouraged to contribute at this early stage, by asking each person to introduce themselves or by inviting participants to state why there are at the meeting. This shared initiation is a crucial point in developing group involvement and member responsibility. If the participants are not contributing in the initial period, the group can quickly become passive and uninvolved.

    The act of initiating also occurs at other stages of the meeting, when the meeting bogs down or needs to take up another aspect of the issue at hand. For the planning meeting, initiation may take place at the beginning of each section of the case plan. For example, after adequate attention is been paid to discussing short-term objectives, initiation will be needed to begin discussion about tasks to meet those objectives.

    Initiation may serve as the fuel for group movement. Without it, the meeting may drift needlessly. The participants need to be sensitive to the appropriate timing for initiating further exploration or new direction. One way of doing this is to enquire "I wonder if the meeting has reached a point where we are ready to move on. I'd like to check to see how others feel, and particularly to see if someone still has a point to make on the issue we're now discussing. What do you all think?".

2. **INFORMATION OR OPINION SEEKING**

    "Requesting facts; seeking relevant information; asking for suggestions and ideas".

    High quality information is necessary for an effective case plan. If the activities in the pre-meeting phase were adequately performed then much of this information will be available before the meeting.

    During the meeting, this information needs to be shared and gaps in participant's knowledge need to be filled. Inadequate decisions result from a lack of information and can also result when -

    * information is withheld because it has not been sought;

    * discussion is curtailed;

    * individuals fear their ideas/knowledge might be rejected, discounted or ridiculed.

    The group leader needs to be sensitive and support of the actions and statement of group workers and verbally reinforce, by appropriate comment, the validity of the ideas expressed by every member.

3. **INFORMATION OR OPINION GIVING**

    "Offering facts; providing relevant information about group courses; stating a belief; giving suggestions or ideas".

    (The counterpart to (2) "Information or Opinion Seeking"). Group members will be reluctant to give out their knowledge or opinion if there is -

    * disrespect among workers;

    * low trust

    * poor group cohesion.

    Members need to be encouraged to give pertinent information at appropriate times. For the social worker, information concerning statutory obligations, the meaning of legal status (e.g. being a Ward), the rights of children and parents are examples of knowledge that will need to be shared. All members will have personal information or opinion to give and it may require the chairperson or other members to model and to facilitate the full sharing of this information.

4. **ELABORATING OR CLARIFYING**

    "Interpreting or reflecting ideas and suggestions; clearing up confusion; indicating alternatives and issues; giving examples".

Good ideas may be lost or not heard unless clarified or elaborated. One of the group building functions of a leader is to listen for partially stated ideas or opinions and then seek elaboration by questioning all members about the implications. This will be particularly important when group members are diffident and uncertain about the quality of their statements.

5. SUMMARISING

"Putting together ideas; restating suggestions after discussion; offering a decision or conclusion for the group to accept or reject".

Discussion can raise a lot of material that can often feel overwhelming to group members. The chairperson needs to be able to link expressed ideas and information, showing the connections between the individual statements of group workers. Summarising does not just occur at the conclusion of discussion on an issue but is a most useful, ongoing method of helping members focus their thoughts and ensure an idea does not get lost. Accurate summaries, containing the expressed ideas of members, will allow those members to see more clearly for accepting or rejecting the collective thoughts of the group. This will likely occur at each stage of the case plan development.

6. CONSENSUS TESTING

"Sending up trial balloons to see if group is reaching a conclusion; checking with group to see how much agreement has been reached".

Consensus testing can occur through using the skills of summarising. Is the amount of information now shared by the group sufficient to enable a decision to be made? Is there an understanding now held by the group about the direction discussion should take? The chairperson can express the unstated conclusions the group seems to have reached as questions to be tested. For example in a planning meeting, the chairperson may have heard members express the Short-term Objectives in different words but with the same intent. He/she could state the apparent consensus and check for verbal confirmation from the group workers. Every group member has an opportunity to influence the final decision and this increases the commitment to achieve objectives.

MAINTENANCE ACTIVITIES

1. ENCOURAGING

"Being friendly, warm and responsive to others; accepting others and their contributions; regarding others by giving them opportunity and recognition".

Frequently, people need encouragement to participate in groups. Often an individual feels uncertain about the value of his contribution and presents a hesitating, poorly expressed idea that is passed over by more dominant members. If a member or the chairperson notices that the member's hesitation - rather than the quality of the idea - results in the point being ignored, he can give encouragement in a number of ways: by asking for elaboration; by restating the idea so that it is clear (with due credit to the originator); or by adding to the idea. Often members can help to keep the group in good working order by encouraging each other to:

* experiment with a new approach to a problem;

* change, temporarily, the meeting methods;

* dig deeper into the subject;

* explore new avenues to the goal;

* test ideas before making decisions.

Members can also serve the group by showing in a caring and concerned way, rather than in a punishing and demanding way, how they may help each other. As in all maintenance activities, sensitivity and watchfulness for clues are necessary so that the encouraging function is not overused.

2. EXPRESSING GROUP FEELINGS

"Sensing feelings, mood, relationships within the group; stating his own feelings or affect with other members".

Members of a planning meeting will not only have thoughts about the ideas and suggestions made but will also have feelings, positive or negative, associated with content. These feelings need to be passed and acknowledged positively to maintain a safe, open, structure in the group. Particularly when conflicts arise, it is important for members to freely express their own feelings and openly acknowledge the reactions of others to the issues in dispute. The chairperson or social workers' disclosure of feelings will be helpful to other members in modelling willingness to reveal more than intellectual responses to issues.

3. HARMONIZING

"Attempting to reconcile disagreements; reducing tension; getting people to explore their differences".

The harmonizing actions may be helpful in a conflict situation. A member who performs this function seeks to find some common ground that both sides can accept, perhaps by locating a solution to the problem that is agreeable to all or by reminding the participants of what is happening to the group.

Harmonizing should not be confused with attempts to bury or deny conflict. Conflict in a meeting is inevitable; resolving it constructively is a challenge. Harmonizing is negotiation between opposing sides in which one member serves as a third-party peacemaker, trying to retrieve the best ideas of both sides.

4. COMPROMISING

"When conflict is apparent, offering to compromise one's own position; admitting error; disciplining oneself to maintain group cohesion".

No participant is going to always get the outcome he/she seeks in discussion. There will be a need to shift ground, acknowledge other's strongly held views and to seek common ground. It is important that no-one feels to have lost, had their view rejected, or feel bulldozed to accept other people's solutions. The chairperson can aid the maintenance of a group in which disagreement can be positively handled by getting people to explore their differences and identify common core issues that are not in dispute. There will be occasions on which the social worker's position may need compromising but this would not include any negation of statutory responsibilities.

5. GATEKEEPING

"Attempting to keep communication channels open; facilitating the participation of others; requesting procedures for discussing group patterns".

Gatekeeping is the function of keeping the group "door" open for the more timid, less talkative members to contribute if and when they wish to. This function may be carried out by the chairperson or any member who is sensitive to others' needs.

A person who speaks infrequently may sometimes lean forward with his mouth half open as if to speak, only to have someone else rush in with a comment. The silent member then closes his mouth and sinks back in his chair. The group loses a contribution that might have been helpful, and the member may experience personal inadequacy, buried resentment toward the group, or hostility towards the dominant members. This situation, which occurs in almost all meetings where more verbal persons dominate, reflects a problem of group maintenance. Effective group cohesion and growth require that members become sensitive to the pattern of participation in their group and aid each other. Although an

individual may feel deeply involved in the discussion while remaining silent, it is important to know whether his silence stems from fear or choice. Acceptance and identity are enhanced by participation.

The gatekeeping function can be overdone. The individual member may have no desire to participate at the time or feel embarassed when forced to say something. Perhaps he feels uninvolved in the current issue or truly has nothing to contribute. Careful observation of body cues - posture and facial expressions - as well as evidence of a long period of non-participation should precede any attempt to serve as a gatekeeper for another member. Gatekeeping should be done with vocal evidence of caring both for the individual and for the group. Otherwise, pressures for conformity can build up to a point where no member feels free to be natural in his contributions, and gatekeeping is used to produce guilt. However, sensitive gatekeeping is vital to good group morale; without it some members remain isolated and rejected, and potential contributions are lost.

6. SETTING STANDARDS

"Expressing standards for the group to achieve; applying standards in evaluating group functioning and production".

The setting of standards is needed for both task performance and group maintenance. Occasionally the group needs to be reminded of its commitment to efficiency, fairness, and open communication. The person fulfilling this function can urge the members to deal with intra-group or interpersonal conflict instead of attempting to ignore its presence. The standard-setter can remind the members of the need for their trusting and caring for each other.

Periodically, the members may wish to discuss the norms or standards that are developing as the group matures. And if the leader is sensitive to both task and maintenance, then a standard that has emerged implicitly can be made explicit for future work.

WORKSHEET II-2A

SELECTING A CITY EXERCISE (A ROLE PLAY)

INSTRUCTIONS

1. Invite six participants to be role-players and the rest of the group
    to be observers.

2. Distribute Handout II-2B (Observers' Form) to each observer and ask
    them to:

    (i)   write the name of each role-player on the top of each list,

    (ii) record each time any of the role-players behave either under
          task or maintenance activities.

3. Place a large envelope containing role playing instruction envelopes
    (Envelopes 1, 2 and 3) in the center of the group of role-players.
    Give no further instructions or information.

4. After the completion of the role-play, project Transparency II-2.
    Invite each observer to state the frequency of ticks ( ) for each
    role-player either under task or maintenance activities as recorded
    on their 'Observers Form'. A pattern may emerge. Check with each
    role-player whether there is consistency between the 'observed
    leadership action(s)' and their 'prescribed leadership action(s)' in
    the role-play.

5. Before the end of this exercise, conduct a group discussion. The
    following questions may help as a starter:

    (i)   Are role-players comfortable in their roles?
           Was it like their usual role?

    (ii)   To what extent has this exercise helped them in gaining
           understanding of the task and maintenance activities of meetings?

    (iii) What specific leadership activities does each role-player
           provide? (the collation of each observer's tally will provide a
           pattern).

    (iv)   Which players enacted their roles most faithfully?

    (v)   Which players displayed the greatest inconsistencies?

    (vi)   How well participation is distributed among role-players?

6.   ENVELOPE INSTRUCTIONS

  (a). PASTE THIS NOTE ON THE FRONT OF LARGE ENVELOPE
        (which contains all other envelopes)

  ┌───┐
  │   READ THIS NOTE LOUDLY   │
  │   │
  │   Enclosed are three envelopes containing   │
  │   directions for the phases of this group   │
  │   session. Open the first envelope at once │
  │   (labeled ENVELOPE 1).   │
  │   Later instructions will tell you when to open │
  │   the second (ENVELOPE 2) and third (ENVELOPE │
  │   3).   │
  └───┘

  (b). INSIDE ENVELOPE 1

  ┌───┐
  │   READ THIS NOTE LOUDLY   │
  │   │
  │   1.   The group has fifteen minutes for this │
  │   session.   │
  │   │
  │   2.   The task of the group is to select a │
  │   city for the next Social Work Conference. │
  │   │
  │   3.   Each role player is to take one of the │
  │   enclosed envelopes and follow the   │
  │   individual role-playing instructions │
  │   contained in it.   │
  │   │
  │   4.   Do not let anyone else see your   │
  │   individual instructions. Do not start │
  │   until everyone is ready.   │
  │   │
  │   5.   After fifteen minutes go on to the next │
  │   envelope.   │
  └───┘

  (c). INSIDE ENVELOPE 2

  ┌───┐
  │   READ THIS NOTE LOUDLY   │
  │   │
  │   1.   The group has five minutes for this   │
  │   session.   │
  │   │
  │   2.   The task of the group is to choose a │
  │   group chairperson.   │
  │   │
  │   3.   After five minutes, go on to the next │
  │   envelope.   │
  └───┘

(d). INSIDE ENVELOPE 3

READ THIS NOTE LOUDLY

1. The group has <u>ten</u> minutes for this
    session.

2. The task of the group is to evaluate the
    first session.

3. The chairperson will lead a discussion
    on the roles and actions of group
    members in the process of decision
    making, and their feelings and reactions
    to that process. The observers are
    requested not to take part in this
    discussion.

4. After ten minutes return the directions
    to their respective envelopes and your
    facilitator will lead a discussion of
    the whole exercise.

(e). ROLE-PLAYING INSTRUCTION ENVELOPES

(Here are the contents of the six individual-instruction envelopes to
be inserted in ENVELOPE 1. Each envelope contains an assigned
leadership action and a position concerning which city to select.
Two of the envelopes also contain special knowledge concerning the
selection process.)

---

1. Your Leadership Actions are:

    INITIATING

    You will start the meeting by stating the
    purpose of the meeting. You will help the
    group to identify the procedures for achieving
    this purpose.

    If the meeting gets bogged down or needs to
    take up another aspect of the issue at hand,
    you will ask for suggestions on how this may
    be done.

    ENCOURAGING

    You will encourage others by being friendly,
    warm and responsive to them. You will show
    your acceptance of them and their
    contributions.

2. Your position is:

    Introduce and support Wellington. Oppose
    Auckland.

---

1.   Your Leadership Action is:

INFORMATION SEEKING

You will request facts relevant to the group
concern, ask for suggestions and ideas.

2.   Your position is:

Introduce and support Wellington. Oppose
Auckland.

3.   Your special knowledge is:

The meeting is going to select a chairperson
later in the exercise. You are to conduct
yourself in such a manner that they will
select you.

---

1.   Your Leadership Actions are:

CLARIFYING & ELABORATING

You will help to clear up confusion by
interpreting what others have said, give
examples that illustrate the issue and restate
in your own words the opinions expressed by
others.

2.   Your position is:

Introduce and support Christchurch.

---

1.   Your Leadership Action is:

SUMMARIZE

This can be done at any time (do not wait
until the end). You will try to pull together
related ideas, you will reflect what the
group seems to be agreeing or disagreeing on,
you will offer suggestions for the meeting to
accept or reject.

2.   Your position is:

When there seems to be a clear difference in
opinion, suggest a compromise city (e.g.
Dunedin or Palmerston North).

1.   Your Leadership Action is:

        HARMONIZING

        You will attempt to reconcile disagreements.
        Find areas of commonality and point them out.
        Reduce tension by getting people to explore
        their differences.

        Your position is:

        Oppose Christchurch

---

1.   Your Leadership Action is:

        GATEKEEPING

        You will make sure that everyone who wants a
        chance to talk gets an opportunity. You can
        also suggest ways the group can work better
        together'.

2.   Your position is:

        Support Wellington.

3.   Your special knowledge is:

        The meeting is going to select a chairperson
        later in the exercise. You are to conduct
        yourself in such a manner that they will
        select you.

---

*   This role-play is an adaptation of "Selecting a City Exercise" in
    JOINING TOGETHER by D.W. JOHNSON and F.P. JOHNSON

DETECTING PATTERNS OF LEADERSHIP ACTIONS

NAMES OF ROLE-PLAYERS

TASK ACTIVITIES	INITIATING: gives ideas, proposes a task					
	INFORMATION SEEKING: asks for facts, ideas					
	INFORMATION GIVING: offers facts, ideas, beliefs					
	CLARIFYING & ELABORATING: clears up confusion					
	SUMMARIZING: restates, offers a conclusion					
	CONSENSUS TESTING: checks on group position					
MAINTENANCE ACTIVITIES	HARMONIZING: reduces tension, explore differences					
	GATEKEEPING: facilitates participation of others					
	ENCOURAGING: acts friendly, warm, accepting					
	COMPROMISING: yields status, admits error					
	SETTING STANDARDS: helps set norms, tests limits					
	EXPRESSING GROUP FEELINGS: senses group feelings and mood, shares own feelings					

ACTIVITY II-3

TASK AND MAINTENANCE
ACTIVITIES OF MEETINGS (II)

OBJECTIVE

To increase understanding of the task and maintenance activities of meetings.

GROUP SIZE

Minimum of eight persons.

TIME REQUIRED

One hour

MATERIALS

1. Handout II-3 (Optional: II-2A and II-2C)
2. Worksheet II-3

PROCESS

1. State the objective of this session and briefly explain how it will be achieved.

2. Explain that this role-play will help to reinforce the concepts of task and maintenance activities gained from Activity II-2 'Selecting a City Exercise '.

3. (Optional)* Distribute Handout II-2A 'Task and Maintenance Activities' to participants and elaborate on each activity.

4. Use Worksheet II-3A 'Every social worker should have a certificate of qualification in social work'.

5. (Optional)* Distribute Handout II-2C at the end of this session.

VARIATION

For additional role-plays, you may introduce a mixture of three task and three maintenance activities.

*Optional - Distribute Handouts II-2A and II-2C if all participants have not taken part in Activity II-2.

HANDOUT II-3

"Every Social Worker Should Have a Certificate of
Qualification in Social Work" Exercise (A Role Play)*

INSTRUCTIONS.

1. Introduce the role-play by commenting on the following issues:

A. Leadership actions in a planning meeting can be divided into two
sets of activities. Those activities that help the meeting to
complete its tasks (task activities) and those that help to
maintain effective collaborative relationships among its members
(maintenance activities). This role play will increase your
understanding of some of these task and maintenance activities.

B. One task or maintenance activity will be allocated to each seat
and the person will act out the role of the seat s/he is seated
on.

C. This group is a sub-committee of the Social Work Training
Council and the topic on the agenda is 'Every social worker
should have a certificate of qualification in social work'. The
committee members are used to discussing things together and
they listen well to one another. At this point, they want to
reach a consensus on this issue.

D. The task of the observers is to keep a tally of record each time
any of the role-players behave either under task or maintenance
activities. Eventually, they should be able to detect from the
patterns emerging on the tally the task or maintenance activity
allocated to each seat. Only one task or maintenance activity
is allocated to each seat.

2. Invite six participants to be role-players and the rest to be
observers. Direct the role-players to their seats and ask them to
read the content in the Instruction Envelope placed on each seat. No
discussion is allowed yet.

3. Distribute Handout II-3A to each observer and ask them to:

(i) write the name of each role-player,

(ii) tally every time any of the role-players behave either under
task or maintenance activities.

4. Direct the committee to start. Allow the committee to discuss the
issue for about ten minutes. When the time is up, ask the
role-players to leave their Instruction Envelope on their seats and
move two seats to the right. Tell them to read the content in the
Instruction Envelope left on their new seats and when the Committee
is ready, direct discussion to be continued. However, this time,
each committee member performs a different activity.

5. After ten minutes, ask each role-player to move two more seats to the right and to continue discussion by performing in terms of the role described by the content in the Instruction Envelope.

6. Stop the discussion after another five minutes and ask the role-players to remain in their seats.

   A. Invite the role-players to express how they feel about the role-play and the various roles they have played. Are there any activities they found easy or difficult to perform?

   B. Ask the observers to add up their tally and to identify the various task or maintenance activities that were associated with each seat. It is possible that some of the role-players may want to comment on the apparent inconsistencies between <u>observed</u> and <u>performed</u> roles.

   C. Before the session is completed, check whether any of the role-players has any immediate issues they would like to raise about their allocated roles before they leave the seat. Ask each role-player 'Is there anything you would particularly like to say about your role before you leave this seat?'

7. <u>ROLE-PLAYING INSTRUCTION ENVELOPES</u>

   (The following six Instruction Slips are to be photocopied and cut so that each slip can be inserted in an envelope. There are three 'task activities' and three 'maintenance' activities').

Your Leadership Action is <u>Initiating</u>. You will start the meeting by stating the purpose of the meeting. You will help the group to identify the procedures for achieving this purpose.

If the meeting gets bogged down or needs to take up another aspect of the issue at hand, you will ask for suggestions on how this may be done.

Your Leadership Action is <u>Information Giving</u>. You will provide facts (even if you must make them up). You will state your opinions and give any suggestions or ideas that come to mind.

Your Leadership Action is <u>Clarifying or Elaborating</u>. You will help to clear up confusion by interpreting what others have said, give examples that illustrate the issue and restate in your own words the opinions expressed by others.

Your Leadership Action is Setting Standards. You will express standards for the group to achieve in terms of how the group will function and/or the methods for decision-making.

Your Leadership Action is Compromising. When your ideas or status is involved in a conflict, you will offer to compromise (if this is appropriate) to maintain group cohesion. You will admit making errors if this is true.

Your Leadership Action is Gatekeeping. You will make sure that everyone who wants a chance to talk gets an opportunity. You can also suggest ways the group can work better together.

*   This role-play is an adaption of "Activity 3 - Leadership and Maintenance Functions" in the book Activities for Trainers : 50 Useful Designs by C. R. Mill.

OBSERVERS' FORM

INSTRUCTIONS:

1. Write the name of each role-player on the top row as shown.

2. Tally (✓) every time any of the role-players behave in a task or maintenance activity.

NAMES OF ROLE-PLAYERS

TASK ACTIVITIES	INITIATING: gives ideas, proposes a task						
	INFORMATION SEEKING: asks for facts, ideas						
	INFORMATION GIVING: offers facts, ideas, beliefs						
	CLARIFYING & ELABORATING: clears up confusion						
	SUMMARIZING: restates, offers a conclusion						
	CONSENSUS TESTING: checks on group position						
MAINTENANCE ACTIVITIES	HARMONIZING: reduces tension, explore differences						
	GATEKEEPING: facilitates participation of others						
	ENCOURAGING: acts friendly, warm, accepting						
	COMPROMISING: yields status, admits error						
	SETTING STANDARDS: helps set norms, tests limits						
	EXPRESSING GROUP FEELINGS: senses group feelings and mood, shares own feelings						

section III

SELECTED ASPECTS OF PLANNING MEETINGS

ACTIVITY III-1

STAGES OF A PLANNING MEETING

OBJECTIVE

To identify the stages of a planning meeting.

GROUP SIZE

Any number of participants

TIME REQUIRED

Half-an-hour.

MATERIALS

1. Transparencies III-1A and III-1B.
2. Handout III-1

PROCESS

A. <u>Pre-session task (Part 1)</u>

1. Distribute Handout III-1 to each participant.

2. Ensure that each participant reads the article before the session.

B. <u>In-session (Part 2)</u>

1. State the objective of this session and briefly explain how it would be achieved.

2. Project Transparency III-1A and summarise the main points of the Handout 'The Stages of a Planning Meeting'.

3. Conduct a discussion by asking some of the following questions:

   (a) Does the structure of the planning meeting stages help us in understanding how a meeting might progress?

   (b) Are there any modifications that may be made to this structure?

   (c) What is the relationship between the 'three phases' and 'the various stages of a planning meeting?'

   (NOTE: Discourage discussion on the specific <u>activities</u> of each stage as this would be done in the next few exercises Activity III-2, Activity III-3 and Activity III-4).

4. Project Transparency III-1B and explain the relationship between the
    'three phases' and 'stages of a planning meeting'. In particular,
    emphasise:

    (a) Tuning-in (remote) activities are identical to some of the
         activities during the last part of the pre-meeting phase (i.e.
   immediately before the meeting phase).
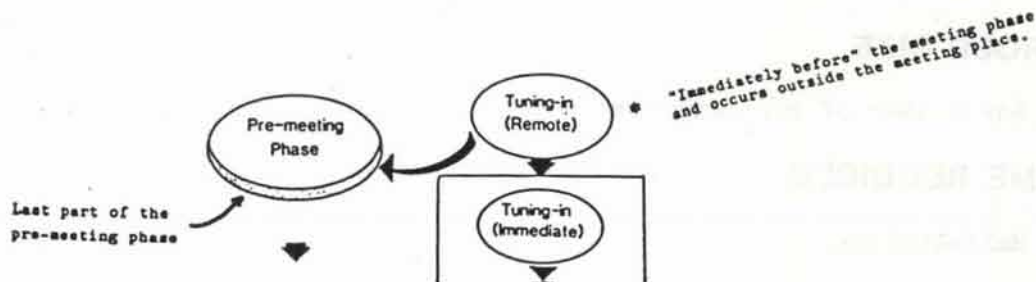
    Can the participants think of an activity for the social worker
    in the 'remote tuning-in stage' which is also an activity in the
    last part of the pre-meeting phase?

    (b) The four stages 'tuning-in (immediate)' 'beginning', 'work', and
         'ending (immediate)' are enclosed by the box to represent the
         meeting phase.
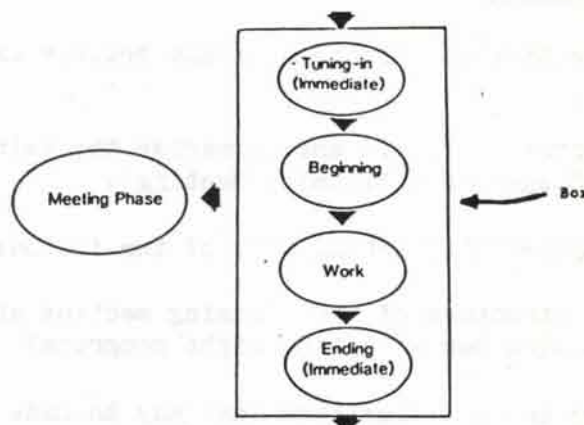
(c) Similarly, the Ending (remote) activities are identical to some
     of the activities in the initial part of the post-meeting phase
     (<u>immediately after</u> the meeting phase).
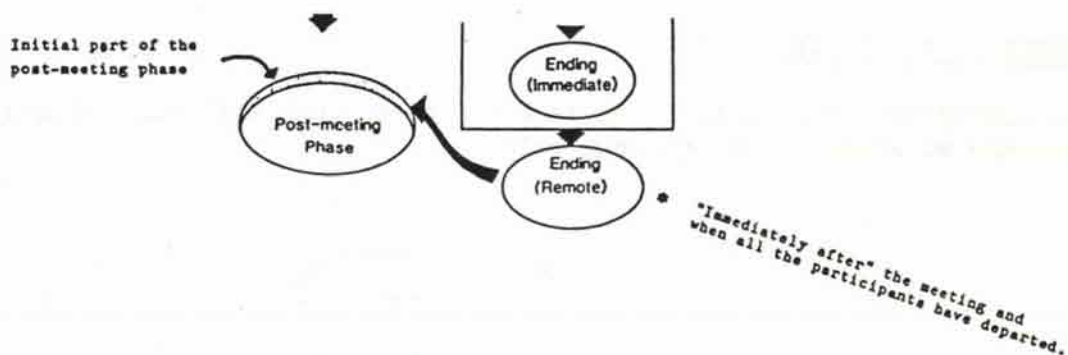
           Ask for an example of one activity in this stage.

VARIATION

This session (Activity III-1) can be included as the beginning of the
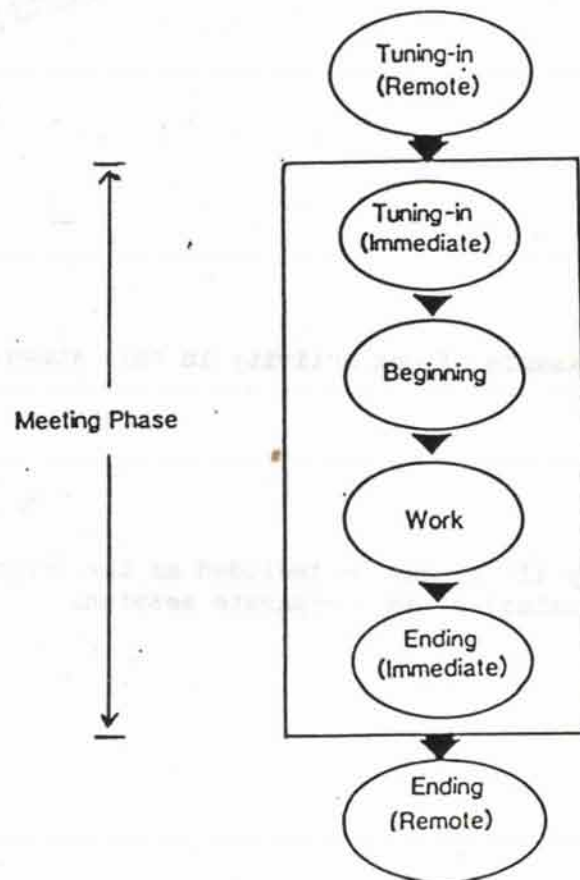next Activity III-2 instead of as a separate session.

HANDOUT III-1

(The following article can be read in 10 minutes. Please read this before the session).

STAGES OF A PLANNING MEETING

The activities of most planning meetings go through different stages in sequence as shown in the diagram below:

The box encloses the four stages within the meeting phase and they are: tuning-in (immediate), beginning, work and ending (immediate) stages.

There are two stages outside the box. The stage immediately before the meeting phase is known as the 'tuning in (remote)' stage and the stage immediately after the meeting phase is called the 'ending(remote)' stage.

What then is the difference between the terms 'remote' and 'immediate'?

The terms 'remote' and 'immediate' are used to distinguish between those activities that are performed <u>outside</u> the physical setting of the meeting place and those occuring <u>inside</u>. For example, making sure the room is physically comfortable can be taken as a <u>remote tuning-in</u> activity, and greeting the participants as they enter the room for the meeting as an <u>immediate tuning-in</u> activity. Similarly, saying 'thank you for taking part in this meeting' is an <u>immediate ending</u> activity as against 'sending a copy of the case-plan to all participants' in the <u>remote ending</u> stage.

Stage 1 - Tuning-In (Remote)

The stage immediately before the planning meeting and in which participants ready themselves to enter the planning meeting. For social workers, remote tuning-in can be perceived as 'preliminary empathy' - the attempt to identify how participants will experience the planning meeting. For example, social workers organising a planning meeting for a child in care may make an assumption at this stage that it is likely that the natural parents will request that the child be returned to their care.

This assumption will be validated or otherwise during the meeting. By unearthing possible themes at this stage, the social worker is doing what we term 'remote tuning-in'.

Specific tasks of this stage may also include mentally and physically preparing oneself for the meeting, confirming the time and location, refreshing one's knowledge of particular aspects of the case, acknowledging hopes and fears held for the meeting, etc.

Stage 2 - Tuning-In (Immediate)

This stage occurs at the outset of the meeting and from the time the first participant enters the meeting room.

At this stage, attention is centred on ensuring that the environment is safe and comfortable.

Specific tasks include welcoming and greeting participants on arrival, ensuring participants' physical comfort, providing ice-breaking activities and offering cups of tea/coffee, etc.

Stage 3 - Beginning

This stage begins when everyone has arrived and is comfortably seated. The meeting now confirms clearly its purpose and the conditions under which it will proceed.

Specific tasks include acknowledging participants' attendance, establishing why they are meeting, establishing time limits and ground rules for the meeting, checking with participants that the format and ground rules are acceptable and that they are ready to proceed, acknowledging potential conflicts between participants, etc.

Stage 4 - Work

This stage is related to the primary task, the completion of the case plan (SW 515).

Assuming the previous stages have been completed the participants address themselves to the job ahead.

Specific tasks include negotiating to find the common ground, challenging obstacles to the completion of the tasks, contributing ideas, feelings, perceptions that are useful in resolving difficulties, defining the requirements and limits inherent in the task, etc.

Stage 5 - Endings (Immediate)

This stage follows the work stage. It may commence in a number of ways, for example, when the plan is completed to everyone's satisfaction or when the agreed time is reached. In some cases the endings may begin when there is a complete breakdown of interaction and when no agreement is reached or by mutual agreement that this is as far as members wish to go at this meeting.

Specific tasks include checking everyone is ready to stop, summarising the content and process, making sure everyone is happy with and accepts the tasks, thanking everyone for coming and participating, etc.

Stage 6 - Endings (Remote)

When everyone has departed from the meeting place, the activities in the remote ending stage commence.
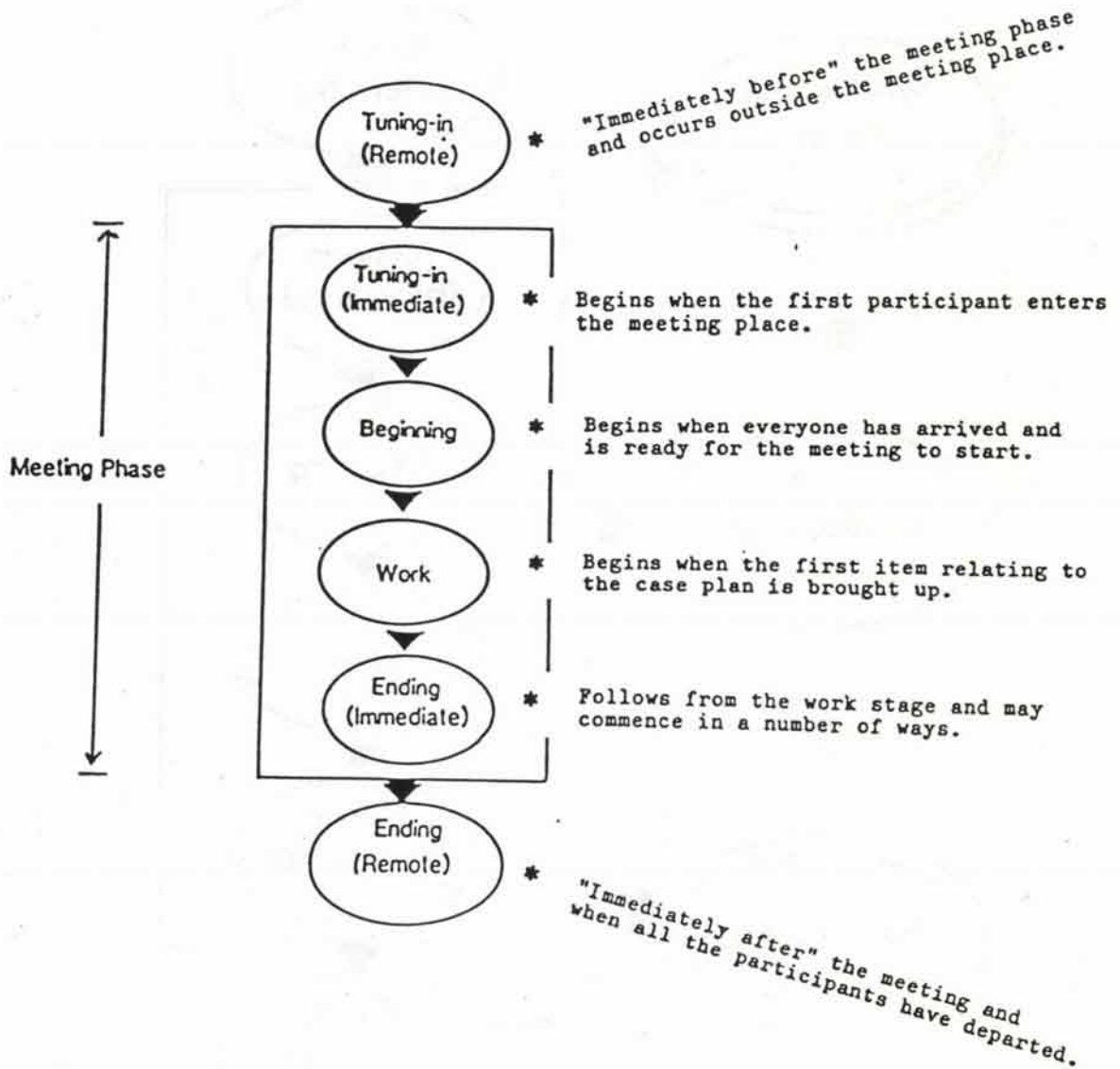
Specific tasks may include tidying up the place, returning any audio-visual aids used, providing feedback on how the meeting was conducted, writing-up the case plan, etc.

During the next few sessions, a more comprehensive list of specific tasks during each stage will be discussed and the relationship between the terms 'phase' and 'stage'.
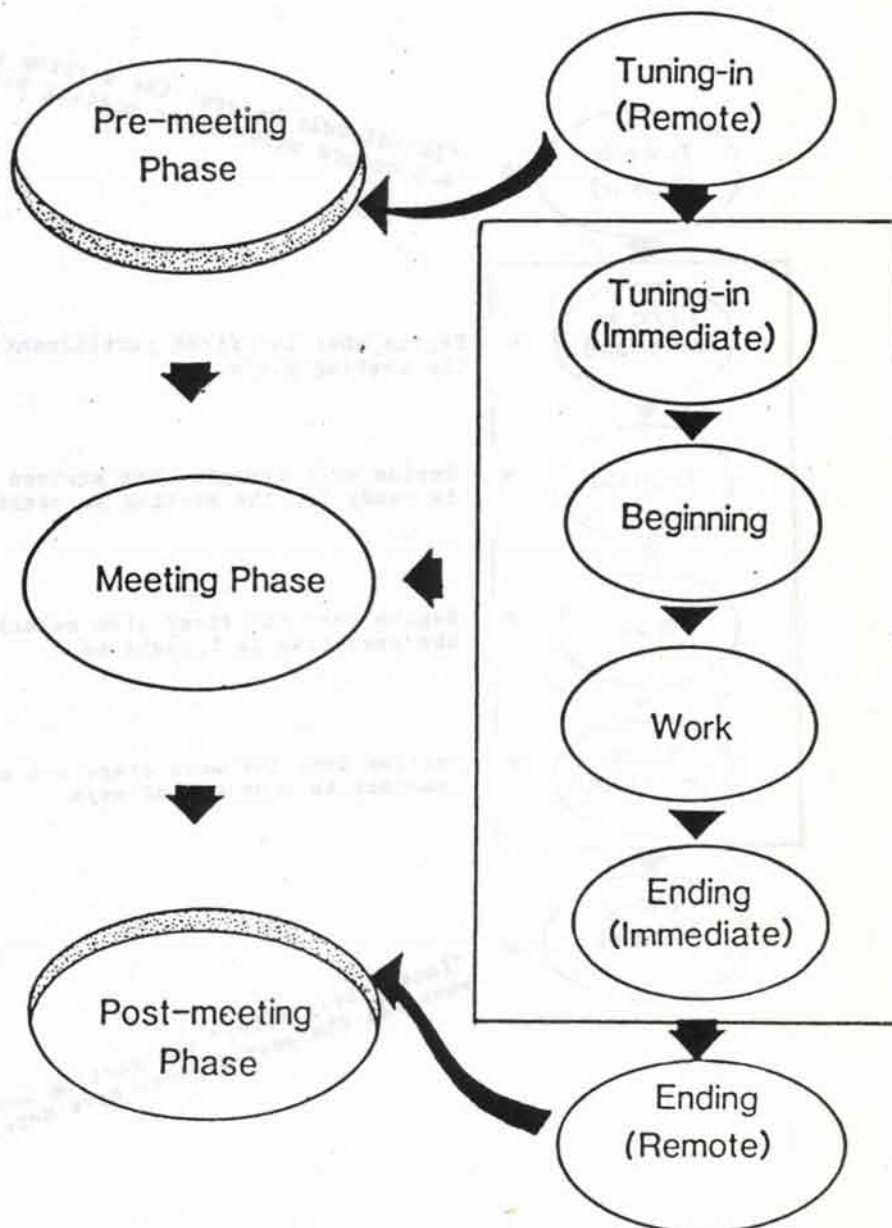
TRANSPARENCY III-1A

STAGES OF A PLANNING MEETING

(A SUMMARY)

Tuning-in (Remote) * "Immediately before" the meeting phase and occurs outside the meeting place.

Meeting Phase

Tuning-in (Immediate) * Begins when the first participant enters the meeting place.

Beginning * Begins when everyone has arrived and is ready for the meeting to start.

Work * Begins when the first item relating to the case plan is brought up.

Ending (Immediate) * Follows from the work stage and may commence in a number of ways.

Ending (Remote) * "Immediately after" the meeting and when all the participants have departed.

THE RELATIONSHIP BETWEEN THE PHASES AND STAGES
OF PLANNING MEETINGS

ACTIVITY III-2

BEGINNINGS OF PLANNING MEETINGS

OBJECTIVE

To identify a list of activities pertinent to the beginnings of planning meetings.

GROUP SIZE

Minimum of six participants.

TIME REQUIRED

One hour

MATERIALS

1. Transparency III-2
2. Handout III-2
3. Newsprint

PROCESS

1. State the objective of this session and briefly explain how it would be achieved.

2. Project Transparency III-2 and comment on the following points:

    (a) Even though the focus of this session is on the identification of activities in the beginnings of planning meetings, the relevant activities in the 'tuning-in' stage will also be considered.

    (b) The 'tuning-in (remote)' stage is concerned with how the participants ready themselves to enter the planning meeting. In general, this stage covers the activities immediately before the planning meeting. This session will identify those activities pertinent to the social worker in the preparation for the meeting.

    (c) The 'tuning-in (immediate)' stage occurs at the outset of the meeting and from the time the first participant enters the room. Attention is centred on ensuring the immediate environment is safe and comfortable. What then are the activities relevant to this stage?

(d) The 'beginning' stage is when the meeting confirms clearly its purpose and the conditions under which the meeting will proceed. Often, the 'make or break' of a meeting depends largely on how well this stage is being attended to. For this session, we will identify a list of activities relevant to this stage of the meeting.

3. Form groups of three. Each group to identify and report on the topic 'A list of activities pertinent to the tuning-in (remote), tuning in (immediate) and beginning stages of planning meetings.'

4. After twenty minutes, each group will report back to the session their respective list. Do not encourage any discussion until all the groups have completed their reporting. Conduct a discussion on the findings.

5. Distribute Handout III-2 and discuss the relevance of any additional activities found in this Handout.

6. Facilitate the formulation of one list of activities pertinent to the office/team's approach to planning meetings.

HANDOUT III-2

"TUNING-IN" AND "BEGINNING" STAGES OF PLANNING MEETINGS

The activities in the following checklist are not arranged in any fixed order. Your task is to complete a personal checklist appropriate to the approach to planning meetings adopted by your office/team.

(A) "TUNING-IN (REMOTE)" STAGE

Preparing oneself (mentally and physically)
Confirmation of the time and location
Refreshing your knowledge of particular aspects of the case.
Acknowledging hopes and fears held for the meeting.

(B) "TUNING-IN (IMMEDIATE)" STAGE

Welcoming and greeting everyone on arrival
Ensuring privacy and no interruptions by placing sign on door and informing telephonist.
Inform where toilet facilities are, toys for young children (if appropriate).
Ensuring comfortable seating arrangements.
Introduce 'ice-breaking' activities (if appropriate).
Quick introduction of participants.

(C) "BEGINNING" STAGE

Welcoming, acknowledging (including absentees) and thanking participants for attending meeting.
Establish the reasons and purpose for the meeting and check with each participant their personal perceptions about the purpose.
Establish the agenda and ground rules of the meeting with the participants and check that agenda and ground rules are acceptable.
Clarify participant's role (especially those of social workers and other professionals present.)
Distribution of relevant papers.
Explain the use of any aids to the meetings.
Acknowledge conflict sources in the group.
Acknowledge language differences (jargon, cultural).
Check out and acknowledge any 'hidden agenda'.
Acknowledge the sources and nature of power/authority that each participant can bring to the meeting.
Check with participants if they are comfortable for the meeting to proceed.
Invite social worker to begin (i.e. start of 'work' stage).

TRANSPARENCY III-2

THE 'TUNING-IN (Remote and Immediate)' AND
'BEGINNING' STAGES OF PLANNING MEETINGS
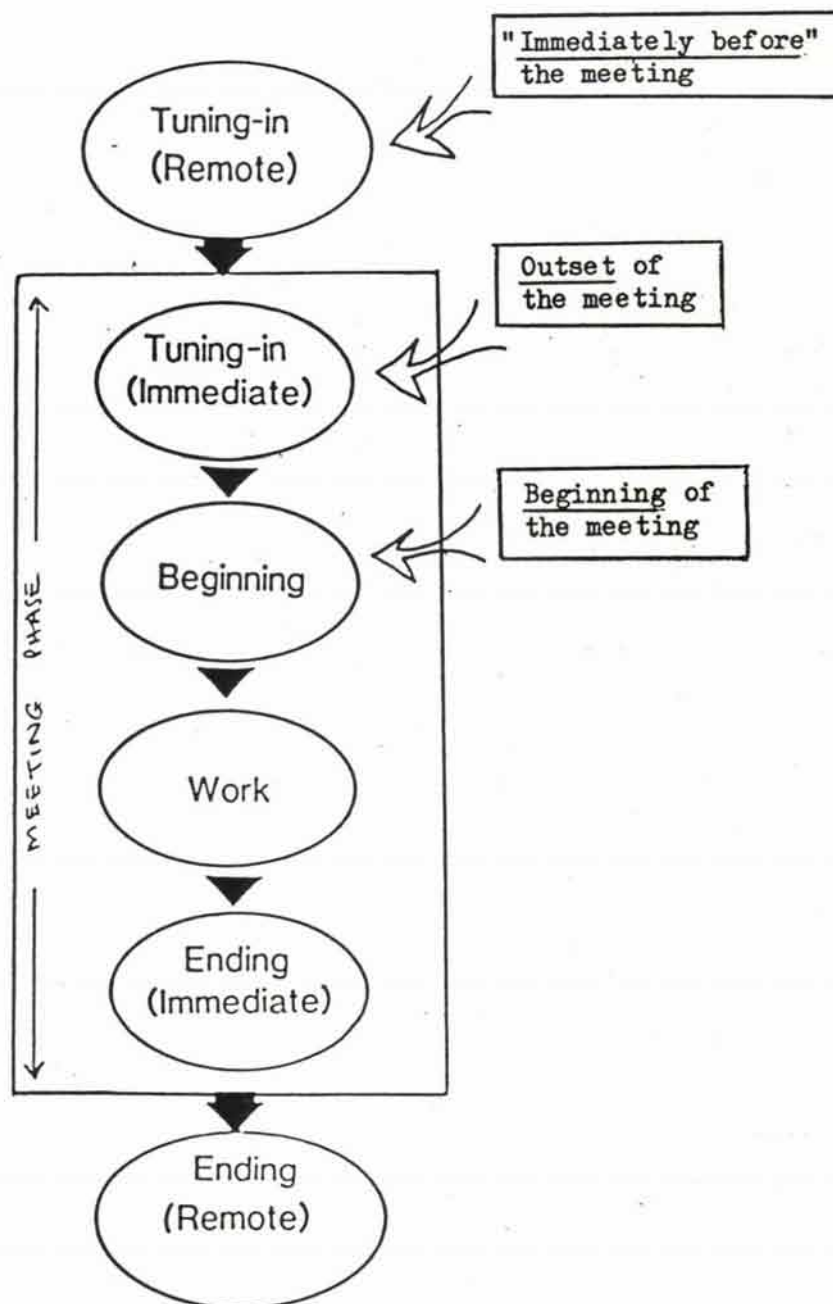
ACTIVITY III-3

WHEN DO WE END A PLANNING MEETING ?

OBJECTIVE

To identify the various <u>cues</u> for ending a planning meeting.

GROUP SIZE

Minimum of six participants.

TIME REQUIRED

Half-hour

MATERIALS

1. Worksheet III-3
2. Transparency III-3

PROCESS

1. State the objective of this session and explain how it would be achieved.

2. Distribute Worksheet III-3 to each participant and ask them to complete the exercise in five minutes.

3. Project Transparency III-3 and ask each participant to report the results from Worksheet III-3. Tally the results.

4. Conduct a discussion on the pattern shown on Transparency III-3 and invite participants to discuss other <u>cues</u> for ending a planning meeting.

WORKSHEET III-3

CONDITIONS FOR ENDING A MEETING

Instructions

1. Please complete the following exercise in five minutes.

2. In your last three planning meetings, tick in the appropriate boxes
    the conditions which helped you to decide when to end a meeting.

3. Spaces are provided for you to list other 'conditions' not included
    in this table.

Conditions for the 'ending' stage (i.e. the 'cues')	TICK HERE (✓)		
	Meeting 'x'	Meeting 'y'	Meeting 'z'
When the plan is completed to everyone's satisfaction.			
When the agreed time limit is reached.			
When there is a complete breakdown of interaction.			
When no agreement is reached.			
When the participants become restless/there is a loss of energy.			
By agreement, that this is as far as members wish to go at this meeting.			

TRANSPARENCY III-3

CONDITIONS FOR ENDING A MEETING

Conditions for the 'ending' stage (i.e. the 'cues')	TALLY HERE (✓)		
	Meeting 'x'	Meeting 'y'	Meeting 'z'
When the plan is completed to everyone's satisfaction.			
When the agreed time limit is reached.			
When there is a complete breakdown of interaction.			
When no agreement is reached.			
When the participants become restless/there is a loss of energy.			
By agreement, that this is as far as members wish to go at this meeting.			

ACTIVITY III-4

ENDINGS OF PLANNING MEETINGS

OBJECTIVE

To identify a list of activities pertinent to the endings of planning meetings.

GROUP SIZE

Minimum of six participants.

TIME REQUIRED

One hour

MATERIALS

1. Transparency III-4
2. Handout III-4
3. Newsprint

PROCESS

1. State the objective of this session and briefly explain how it would be achieved.

2. Project Transparency III-4 and comment that "having recognised the cue to end a meeting, how then do you end it effectively? If there is unfinished business on the agenda, how do you bring the meeting to an end under such conditions? The purpose of this session is to examine some of the activities for ending a meeting effectively."

3. Form groups of three and ask each group to identify and report on a list of activities pertinent to the endings of planning meetings.

4. After twenty minutes, each group will report back to the session their respective list. Do not encourage any discussion until all the groups have completed their reporting. Conduct a discussion on the findings.

5. Distribute Handout III-4 and discuss the relevance of any additional activities found in this Handout.

6. Facilitate the formulation of one list of activities relevant to the office/team's approach to planning meetings.
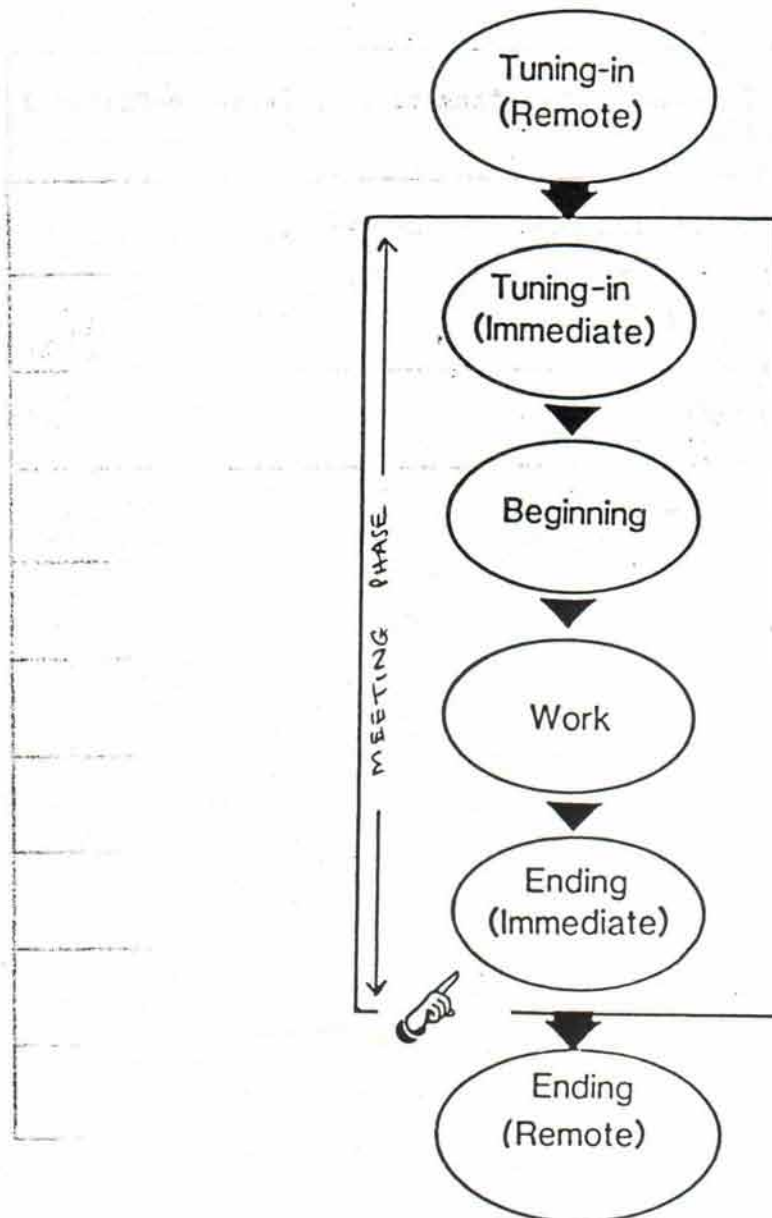
HANDOUT III-4

THE "ENDING (IMMEDIATE)" STAGE OF PLANNING MEETINGS.

The activities in the following checklist are not arranged in any fixed order. Your task is to compile a personal checklist appropriate to the approach to planning meetings adopted by your office/team.

"ENDING (IMMEDIATE)" STAGE

Checking that everyone is ready for meeting to stop (i.e. 'unfinished business' or ' agreement').
Making sure everyone is clear and accepting of tasks.
Summarising content and process.
Explaining what happens next.
Encouraging everyone in their tasks.
Arrange tentative date for next meeting (if appropriate).
Thanking everyone for coming and for participating.
Chairperson leads by standing up (to signal move).
Informal chit-chat (i.e. arranging transport, etc).

TRANSPARENCY III-4

THE 'ENDING(Immediate)' STAGE OF PLANNING MEETINGS

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                    ┌───────────────┐
                    │   Tuning-in   │
                    │   (Remote)    │
                    └───────┬───────┘
                            │
                            ▼
        ┌───────────────────────────────────┐
        │         ┌───────────────┐          │
      ↑ │         │   Tuning-in   │          │
        │         │  (Immediate)  │          │
        │         └───────┬───────┘          │
      M │                 ▼                  │
      E │         ┌───────────────┐          │
      E │         │   Beginning   │          │
      T │         └───────┬───────┘          │
      I │                 ▼                  │
      N │         ┌───────────────┐          │
      G │         │     Work      │          │
        │         └───────┬───────┘          │
      P │                 ▼                  │
      H │         ┌───────────────┐          │
      A │         │    Ending     │          │
      S │         │  (Immediate)  │          │
      E │         └───────────────┘          │
      ↓ │                                    │
        └───────────────────────────────────┘
                            ▼
                    ┌───────────────┐
                    │    Ending     │
                    │   (Remote)    │
                    └───────────────┘
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APPENDICES

Selected paragraphs from the 'Introduction'
section of this book.

In a time when industrialized society is characterized by an emphasis on material things, facts, and cognitive approaches, it seems imperative to attend to the unmet needs of learners in the affective domain. This book gives special attention to structured experiences that seek to strengthen the affective components of learning: the learners' self-awareness, learning climates, interpersonal relationships in learning, recognition of learner needs and perceptions, and competencies needed for facilitating learning approaches. The focus is on people, their perceptions, and their learning experiences.

Structured experiences emphasize an experiential learning approach in which the learners are *directly* involved in the process. The participants' feelings, thoughts, and values have a significant place in their personal assimilation of the learning, or meaning, to be derived from the experience.

When selecting a structured experience for a learning situation, it is suggested that the facilitator keep in mind the developmental stage of the group, the participants' needs, and the facilitator's competencies. Particular attention should also be given to the amount of time needed for talking through (processing) the results of the activity. Throughout the total process of selection, implementation, and planning, the facilitator's behavior serves as a model to learners and prospective facilitators. Consequently, it is the facilitator who can bring the structured experience to life and establish it as an experiential approach in which *learning*—not teaching—is *highlighted*. (The following chapter, On Using Structured Experiences, discusses in greater depth the use of structured experiences.)

The designs of these structured experiences can be easily varied to meet the learning needs of different groups. The facilitator is urged to modify these ideas in response to immediate teaching-learning situations.

Appendix 1

On Using Structured Experiences

Louis Thayer

Structured experiences can enhance personal growth and the growth of a learning group, whether the setting is a university, a high school, or a place where people have come together for a specific learning objective. The essential goal is a more humanistic approach to the process of learning that focuses on the person and his experiencing rather than on a specific content vehicle. Cognitive material is generally present, but the emphasis is on the affective aspects of learning—the person's feelings, meanings, and perceptions.

Affective education and a humanistic approach are important in my view of the learning process. When I am facilitating, I actively participate in as many structured experiences as possible. My participation has increased the learning about myself, has acquainted me with participants (students) as persons, and has helped to facilitate a more personal learning climate. In this way, students continue to view me as a learner and a person even when I approach the task of facilitation.

When preparing structured experiences, it is important to assess the needs of the learning group. Involving the learners in the planning of the experiences adds significantly to their feeling of ownership regarding the learning outcomes. I prefer those learning experiences in which the participants and I (the facilitator) structure the activities to meet certain group needs. Thus, the experiences conform more with the learners' needs, my own personality, and my teaching-learning style.

I generally prefer to create my own structured experiences or to modify already existing activities. When reviewing an experience prepared by someone else, I view it as a well-organized and tested idea—which can be modified, adapted, revised, rewritten, or developed to suit my needs. There is no obligation to use an experience exactly as it is written.

Structured experiences can be used to meet individual or group needs that often arise during a learning process. But the more spontaneous the use of the structured experience becomes, the more effective it seems to be. Timing in the use of these activities is crucial. Also, the facilitator's competency in selecting and preparing structured experiences with the appropriate complexity is reflected in how effectively

the activity meets the learning group's needs. In most aspects of facilitation, the leader serves as a constant model of a facilitator; often, his behavior is the main message. By observing and interacting with the group leader, participants have the opportunity to learn facilitation skills. The facilitator may want to discuss his own behavior and its purpose at different intervals for this type of learning.

Additional points to be considered are some reasons for not using the experiences. It is not effective to use structured experiences to solve emotional problems or to "fill" class or group time. Nor is it useful "to see what will happen" or to use them if the facilitator is absent from a session.

The Facilitator

Most of us can identify a person who facilitates personal growth in others and provides stimulating learning climates. For example, think of an acquaintance who has all the qualities to be a good counselor or a facilitator. I suggest that you close your eyes for a few seconds and think about this person. What characteristics describe this person? From reviews of research and my own experiences, I have learned that the effective helper or facilitator has three outstanding personal qualities: genuineness, empathy, and respect for others. Rogers (1965) describes these qualities as *congruence, empathy,* and *unconditional positive regard.*

Rogers (1965) believes that "personal gro .th is facilitated when the facilitator* is what he *is,* when in the relationship with his client he is genuine and without 'front' or facade, openly being the feeli   and attitudes which at that moment are flowing in him" (pp. 50-5).   's is congruence or genuineness.

The second quality is empathy. "The facilitator* is experiencing an accurate empathic understanding of his client's private world, and is able to communicate some of the significant fragment c that understanding" (p. 53).

The third quality is the unconditionality of positive regard, or respect for others. "The facilitator* is experiencing a warm, positive, acceptant attitude toward what *is* in the client" (p. 54). In other words, he prizes the participant.

If the facilitator is perceived by the partici ants as a person and a learner who is striving for genuineness, empathy, and respect for others, he is regarded as an effective leader. These qualities are necessary

*The word *facilita or* has been substituted for the term *counselor* in the three quotes from Carl Rogers.

whether one is counseling, teaching-learning in the classroom, or facilitating groups.

When these three qualities become more representative of the total group, they lead to a general climate that highly stimulates interpersonal relationships for the facilitation of learning (Rogers, 1969). I believe that structured experiences cannot be truly effective without these growth conditions. In an understanding, warm, non-evaluative atmosphere, learners share significant thoughts and feelings about themselves—a sharing that leads to greater self-disclosure and risk taking. If the climate is changing in this positive direction, the process becomes more personalized and the structured experience is de-emphasized. The process becomes the lesson.

According to Combs' (1969) studies of helping persons, those who were most effective perceived people and their behaviors as friendly, worthy, and helpful; perceived themselves as *with* people, dependable, and wanted; perceived the task of teaching as a freeing, revealing, and an encouraging process; and had a general frame of reference that was internal, toward people, and toward perceptual meanings.

Do you perceive other people and their behavior as friendly/unfriendly, worthy/unworthy, helpful/hindering? Do you perceive yourself as *with* people/*apart* from people, dependable/undependable, wanted/unwanted? Do you perceive the task of teaching as freeing/controlling, revealing/concealing, an encouraging process/goal achievement? Is your general frame of reference internal/external, people/things, perceptual meanings/facts and events? Do you want to be in a position to help others grow personally? Do you want to help enough to be in a growing-changing posture yourself? These are just a few questions that can help a facilitator review his own potential effectiveness in helping others.

Clarifying Expectations

Perhaps the most essential ingredient in getting the structured experience off to a positive start is to clarify facilitator and participant expectations. *Participants have a right to expect clarification before the process begins.* It is helpful for the facilitator to discuss the participants' expectations and then to share his own. In that way, discussion, clarification, and perhaps replanning can follow. Above all, honesty is essential. Participants usually expect to hear about the facilitator's competence and qualifications if not known, how the activity fits the planning for their needs, what part they might play in overall planning, any effects on evaluation, what the essence of the facilitator's participation will be, whether there will be sufficient time for all aspects of the

experience with no unnecessary abbreviation, and, above all, that their individual rights will be protected and not subjected to unwarranted group pressure.

If for some reason the participants will be subjected to a certain amount of risk or to unknown agenda items, everyone should be informed ahead of time. Facilitators will find that discussions prior to the experience do not compromise the effectiveness of the process. And, occasionally, a person may choose not to participate in part of a structured experience, which is that person's prerogative.

The Structured Experience Process

My use of structured experiences stresses the experiential approach to learning. An attempt is made to *involve* people in experiences rather than to talk about the experiences vicariously. Each person is encouraged to assimilate the events in his own personal, unique way. The participants and the facilitator seek ways in which their here-and-now feelings and thoughts can be shared and related to their total learning processes. Although didactic material is not totally neglected, the emphasis is on the person and his own assimilation of the events. Consequently, I start with the person's perceptions of his own behavior in the activities because these self-perceptions, rather than feedback from others, trigger the true *learning* aspect of the experiences.

Cognitive material can be offered by the facilitator in several ways. Mini-lectures are effective when they are spontaneous, brief, extemporaneous, and based primarily on a sequence of real events that are witnessed or experienced by the learners. The mini-lecture often consists of pulling together or summarizing the evident and not-so-evident principles in the activities and the interactions. Although the mini-lecture usually comes from the facilitator, other members of the group often give excellent presentations, which have a very positive effect on the group climate. More than one person can be viewed as a facilitator and a resource person.

Another way of presenting cognitive material is to use handouts, films, or other materials for dissemination or viewing. These additional methods can be effective if they are introduced at an appropriate time in the group's process. Often, a group may wish to prepare its own handout or a short skit reviewing the activities and the principles learned. Preparing skits that reflect the experiences can be great fun.

Jones and Pfeiffer (1975) have suggested five revolving steps in the experiential model. Each step plays a significant part in the total learning strategy for the participants.

Experiencing: The process usually starts with experiencing. The participant becomes involved in an activity; he acts or behaves in some way or he does, performs, observes, sees, says something. This initial experience is the basis for the entire process.

Publishing: Following the experience itself, it becomes important for the participant to share or "publish" his reactions and observations with others who have either experienced or observed the same activity.

Processing: Sharing one's reactions is only the first step. An essential—and often neglected—part of the cycle is the necessary integration of this sharing. The dynamics that emerged in the activity are explored, discussed, and evaluated (processed) with other participants.

Generalizing: Flowing logically from the processing step is the need to develop principles or extract generalizations from the experience. Stating learnings in this way can help participants further define, clarify, and elaborate on them.

Applying: The final step in the cycle is to plan applications of the principles derived from the experience. The experiential process is not complete until a new learning or discovery is used and tested behaviorally. This is the "experimental" part of the experiential model. Applying, of course, becomes an experience in itself, and with new experience, the cycle begins again. (p. 4)

Process Assessment

Process assessment in the structured experience is of equal importance to experiencing as part of the learning strategy. The assessment phase of the total process can be a powerful stimulus to personal behavior changes outside the learning group. There must be ample opportunity for each participant to talk about his feelings and perceptions of the "experiencing" segment (Jones & Pfeiffer, 1975). Improper processing can lead to an aborted learning activity.

Special attention must also be given when nonverbal and fantasy experiences are used. I am very careful not to make any assumptions concerning the thoughts and feelings that are stimulated in such experiences. What appears positive to some individuals may prove negative to others. Participants must be helped to assess the experience thoroughly.

Process assessment usually focuses on the experiences and perceptions of individuals and the interactions of the group during the session. Numerous topical areas are possible in the assessment phase: attitudes toward oneself and others, relationships with significant others, beliefs about people, purposes of learning and growing, changing behaviors "when I go back home," setting goals, etc.

There are several ways of grouping the participants for the assessment phase (Thayer, 1973).

Self-assessment: The individual is enco... himself, his perceptions, his goals, hi... ...carefully at their effects on others. Often... his behaviors and facilitator are given to encourage ...tatements prepared by the consideration of specific topics.

One-to-one sharing: Feedback is provided to the participant by an observer (or observers) with an emphasis on exhibited behaviors—both verbal and nonverbal. Having more than one person share this observation with a participant provides for interesting comparisons of the perceptions about a person's behavior and the actual meanings behind these behaviors.

Small-group assessment (eight to fifteen people): The assessment is conducted by the participants and the facilitator after the experiencing segment. The time is used to point out and discuss various individual perceptions and principles of group interaction that were experienced. Occasionally, this is a very opportune time to give appropriate mini-lectures on group process and related topics.

Large-group assessment (fifteen to forty people): When the group is large, opportunities for each individual to review and relate his perceptions are reduced. The facilitator may need to use his leadership skills to encourage discussion of topics and personal perceptions. An alternative is to divide the large group into smaller subgroups for discussion.

Several additional assessment aids can be used in different groupings for assessment (Thayer, 1973):

The expert or panel of observers: The facilitator can share his perceptions about the activity and then call for reactions from the participants. Alternatively, a panel of observers can be selected to represent the general feelings of the larger group.

Group-on-group observation: Small groups can be used to observe another group in process. Members of the observing group may be assigned to monitor different aspects of the other group. They can often discover and discuss principles of group process and learning. A variation of this format, suggested by Gorman (1974), is the use of three groups formed in concentric circles. The inner group is the interacting group. In the middle group, each member carefully observes and takes notes of a specific person's behavior in the interacting group. After a specified amount of time, each member of the inner group has an opportunity to talk to his observer-coach for feedback and help. The process can continue after a short help session. The third group observes and notes for discussion the general...

...processes that focus on principles of group interaction, such as leadership roles, norms, etc. Observation sheets may be prepared in advance for use with this type of assessment format.

- general process observers
- observer-coach group
- interacting group
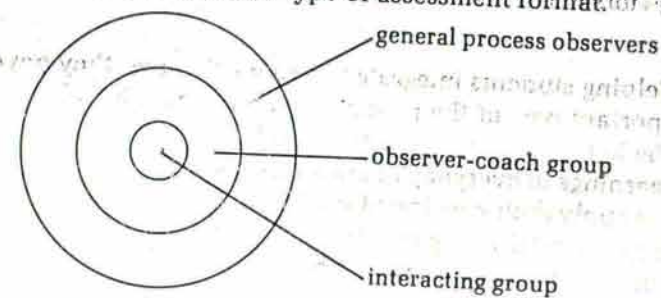
Written materials: Stimulus materials, including questions or incomplete sentences, may be used to encourage individuals to review their experiences and perceptions. Other materials might include case studies or anecdotal reports for comparison with group experiences or an extension of the learning format.

Audiotape and/or videotape recording: Recording equipment allows playback of the entire session or selected segments for assessment purposes. These aids can be used in many unique ways; however, they can be very threatening to some individuals. Plans for using recording equipment should be discussed and agreed upon with participants prior to the structured experience.

Assignments: The facilitator or instructor may find some optional assignments helpful to learners. The participants may be asked to keep a log of their feelings, thoughts, and the principles learned in the structured experience. They may also be asked to write an assessment of their own perceptions and behaviors in the experience or a critical analysis of the group session describing roles, types of leadership, and other group processes. Some facilitators may utilize this approach to ask for written assessments of their roles as group facilitators.

Imagery: Participants can be asked to close their eyes and to recall actual images of the experience. Usually the facilitator can provide stimulus statements for the participants to visualize certain events. Muscular relaxation facilitates the use of imagery to recall experiences. After the experience has been visualized, participants can be encouraged to discuss any perceptions or feelings they encountered while imaging the previous events.

Fantasy: A short fantasy trip may follow the use of imagery. Participants can fantasize how they would like the experience to have... use the structured experience in their

own work setting. They can develop goals, ways in which they would change behaviors, or ways to transfer new experimental behaviors to everyday life situations.

Helping students integrate the new principles they have learned is an important part of the process. If the learning is to last, participants must be helped to set goals and establish plans for the transfer of their new learnings to everyday relationships—to open avenues for exploring ways to apply their new learnings. The process can be continued to help participants establish plans for behavioral change, experiment with new behaviors, assess their behaviors, and continue experimenting again.

When the total structured experience or the process is genuine and meaningful, participants share very personal feelings, concerns, and perceptions. At appropriate times, I have offered personal assistance in the form of individual and group counseling. However, if the facilitator is not qualified to counsel, he should be able to assist participants in finding other sources of assistance.

Feedback Principles

Although feedback is not a part of the process in every structured experience, the frequency of its use in experiences warrants attention. If feedback is involved in the learning process, the facilitator should spend time discussing principles of feedback, giving examples of each principle, and asking participants to review their own verbal feedback behavior prior to the beginning of the structured experience.

Participants are encouraged to focus more on individual strengths than on weaknesses. This point is crucial in establishing a positive learning climate. My experiences in learning groups have led me to encourage others not to make too many assumptions about people and the reasons for their behavior.

The implementation of an experience is more successful when a positive attitude is expressed by the facilitator. Each person in a learning group can assume responsibility for assisting others in learning, and feedback is one way that people can help each other. Feedback to individuals and the way in which it is provided often affect the learning climate and the beneficial effects experienced by individuals.

Johnson (1972) has prepared eleven principles on the use of feedback.

1. Focus feedback on behavior rather than on persons.
2. Focus feedback on observations rather than on inferences.

3. Focus feedback on description rather than on judgment.
4. Focus feedback on descriptions of behavior which are in terms of "more or less" rather than in terms of "either-or."
5. Focus feedback on behavior related to a specific situation, preferably to the "here-and-now," rather than on behavior in the abstract, placing it in the "there-and-then."
6. Focus feedback on the sharing of ideas and information rather than on giving advice.
7. Focus feedback on exploration of alternatives rather than on answers or solutions.
8. Focus feedback on the value it may have to the receiver, not on the value of "release" that it provides the person giving the feedback.
9. Focus feedback on the amount of information that the person receiving it can use, rather than on the amount that you have which you might like to give.
10. Focus feedback on time and place so that personal data can be shared at appropriate times.
11. Focus feedback on what is said rather than why it is said.

(pp. 16-17)

A handout listing these principles can be prepared for discussion and used throughout the group process. I find that the principles help almost everyone become more aware of verbal and nonverbal feedback during the experience.

Modifying a Structured Experience

Implementing an activity according to the original format is especially helpful for facilitators who are only beginning to use structured experiences to reach learning goals or to change to a more humanistic approach. However, by varying parts of a structured experience, the facilitator can add significantly to its overall usefulness in the learning group's setting. It is suggested that the facilitator study carefully the structured experience as it relates to the learning situation before he uses the experience. The facilitator may be able to note the basic area(s) in which a change or variation will need to be made to meet the specific learning objectives in the experiential process.

The process of modifying a structured experience may be most efficiently and systematically carried out by beginning with a comparison of the stated goals of the structured experience and those of the learning group. If the general goal stated matches the desired outcome for the group, then the facilitator can make sure that each segment of the structured experience fits his needs or he can modify the goals, group size, time required, physical setting, materials, or step-by-step process to reach his objectives. Often, other handbooks on structured experiences

(e.g., Pfeiffer & Jones, 1973, 1975) offer good ideas for variations with similar theme-oriented structured experiences. As the facilitator uses or develops experiences, he may wish to take notes during the process or let the group brainstorm for new ideas after the experience has ended. Frequently, participants are most helpful in pinpointing process steps that need altering.

Planning and Sequencing

When I use certain activities to facilitate learning groups, I plan the sequence in which I intend to use the structured experiences over the course of the sessions. I generally plan the experiential segment of the learning so that the structured experiences flow from relatively simple to increasingly complex in terms of values, attitudes, and group process. Process assessment, used after each structured experience, affects the content and direction of future experiences. As much as possible, I share the responsibility for planning future activities with the participants (students). The participants usually feel good about being able to modify the process.

Conclusion

If structured experiences are successful and good group learning conditions develop, groups tend to move away from the need for structure to approach certain topics, values, and behaviors. The focus is on more personal, human interaction and learning. With honesty, trust, understanding, and positive regard, threat to individuals is at a minimum. The facilitator also becomes a participant and can experience controversial topics, complex value systems, and interpersonal relationships. So, in a way, structured experiences can be used successively to approximate a situation or an environment in which no formal structure is needed. Persons come together to learn what they wish to learn. I find that this trend away from structure happens somewhat naturally if most participants, including the facilitator, are genuinely seeking to become more of the persons they can be. That's exciting.

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Appendix 2

SUGGESTED BACKGROUND READINGS

The books listed below are available in the DSW Library:

1. JOHNSON, W.J. & JOHNSON, P.J. - 'Joining Together, Group Theory and Group Skills; pp. 1-54.'New Jersey: Prentice Hall, 1975.
   (Library Catalogue No: 301.185 JOH)

2. BRADFORD, L.P. - 'Making Meetings Work' La Jolla: University Associates, 1980.
   (301.185 BRA)

3. NAPIER, R.W. & GERSHENFELD, M.K. - 'Groups: Theory and Experiences' Boston: Houghton Mifflin Co., 1973.
   (361.4 NAP)

4. BROWN, Allan - 'Groupwork; pp. 47-61' London:Heinemann, 1979.
   (361.4 BRO)

5. SCHWARTZ, W. & ZALBA, S.R. - 'The Practice of Group Work pp. 13-18' New York:Columbia University Press, 1971.
   (361.4 PRA)

6. COOPER, Susan & HEENAN, Cathy - 'Preparing, Designing, Leading Workshops' Boston:CBI Publishing CO., 1980.
   (658.312404 COO)

7. LOUGHARY, J.W. & HOPSON, B - 'Producing Workshops, Seminars and Short Courses: A Trainers' Handbook' Chicago: Follett Publishing Co., 1979.
   (658.3124 LOU)

8. THAYER, Louis - '50 Strategies for Experiential Learning: Book One' San Diego: University Associates, 1976.
   (371.1 THA)

9. MILL, C.R. - 'Activities for Trainers: 50 Useful Designs' San Diego: University Associates, 1980.
   (158.2 MIL)

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