Conducting Effective Supervision Meetings at AWARE

INSTRUCTIONAL DESIGN

Valen Anderson, James Snookes, Joel Strasser

2/22/2019
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Team Charter

Project Success Specification

Team Mission
To collaboratively work together and with our client to conduct a performance analysis and create an instructional plan. We will:

- Apply our knowledge from present and past classes and experience relating to instructional design techniques and tools (i.e. Merrill’s principles).
- Build and develop our instructional design knowledge and skills for future transfer to our workplace.
- Practice communication and satisfaction skills with clients on client-identified performance gaps and training needs.
- Share ideas and opinions in productive and professional ways.
- Strengthen our ability to implement feedback and produce effective results for this assignment and future assignments.
- Develop project management and communication skills through planning, organization, and open communication with the client and all team members.

Team Critical Success Factors (CSFs)
The team will determine levels of success based on the following indicators.

<table>
<thead>
<tr>
<th>Team CSFs</th>
<th>Indicator of success</th>
</tr>
</thead>
</table>
| Effectively apply instructional design techniques to our project and its deliverables. | • Client satisfaction.  
• Positive feedback from the professor.  
• Final project receives full credit from the professor.  
• Full points on deliverables. |
| Adapt to feedback to increase effectiveness of our design. | • Feedback is provided by team members and most importantly, the professor.  
• Feedback is recognized and applied by all team members.  
• Receive full points on final pass of all deliverables. |
| Collaborate effectively in a virtual-team environment. | • Give and receive constructive feedback amongst the team members.  
• Team members’ self-reported willingness to work with each team member on hypothetical future |
| **Delegate responsibilities amongst team members based on strengths.** | • Roles assigned throughout the project are completed by the internal deadlines to the satisfaction of the group.  
• Roles assigned fit each individual’s strengths.  
• Group members have a high level of satisfaction with the final product and the process of the project.  
• Group members agree that division of workload is balanced and equitable. |
|---|---|
| **Develop and work within scheduled internal and deliverable deadlines.** | • Internal roles are filled on time to the satisfaction of all group members.  
• Deliverables are submitted on time.  
• All team members use Asana for the purpose of ensuring deadlines are met.  
• Group members review teammates work before internal review deadlines and provide assistance on an ongoing basis. |
| **Effective client consultation skills.** | • Client has favorable review of final project deliverable.  
• Client reports that the team appropriately understood and effectively delivered key information and skills.  
• Team provides all communication to the client with sufficient time and clarity for the client to respond with the required information; this will allow the team to meet its deliverable deadlines.  
• Minimal use of client’s time. |
## Prior Experience and Lessons Learned

<table>
<thead>
<tr>
<th>What Worked Well</th>
<th>What Could Have Been Improved</th>
<th>Lessons Learned for This Team</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A clear internal timeline for group members.</td>
<td>• Tracking communication so all members are aware of updates, needs, and changes.</td>
<td>• Open communication leads to effective teamwork.</td>
</tr>
<tr>
<td>• A clear delineation of responsibilities for group members.</td>
<td>• Establishing time limits on meetings so group members can manage their schedules outside of group work.</td>
<td>• The use of effective tools and programs makes for lighter work, more focused time spent, and better project outcomes for all (i.e. Asana).</td>
</tr>
<tr>
<td>• Regular scheduled group meetings.</td>
<td>• Achieving universal understanding of key points between group members.</td>
<td>• Establish a clear internal review cycle in Google Docs and clearly label each deliverable on the final Word Document.</td>
</tr>
<tr>
<td>• Respectful presentation of constructive criticism.</td>
<td>• Transparency with the professor about progress and regularly asking for feedback.</td>
<td>• Ask for frequent feedback from the uber-client, our professor.</td>
</tr>
<tr>
<td>• Setting unanimity as the benchmark goal for decision-making.</td>
<td>• Transparency and open communication with the client.</td>
<td>• Communicate with the team when unsure how the team is using tools, e.g. Asana, suggestions in Google Docs.</td>
</tr>
<tr>
<td>• Setting a standard of proactivity when issues arise.</td>
<td></td>
<td>• Be as responsive and flexible as possible, especially at the beginning.</td>
</tr>
<tr>
<td>• Consulting the project rubrics before submission to ensure accuracy and meeting objectives.</td>
<td></td>
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<tr>
<td>• Building on each team members’ strengths when assigning duties.</td>
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<tr>
<td>• Using an agenda during team and client meetings, and recording minutes.</td>
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<tr>
<td>• Tracking communication so all members are aware of updates, needs, and changes.</td>
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<tr>
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<td>• Establish a clear internal review cycle in Google Docs and clearly label each deliverable on the final Word Document.</td>
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<td>• Ask for frequent feedback from the uber-client, our professor.</td>
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<td>• Communicate with the team when unsure how the team is using tools, e.g. Asana, suggestions in Google Docs.</td>
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</tr>
<tr>
<td>• Be as responsive and flexible as possible, especially at the beginning.</td>
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Project Management

Project Scope
The team will regularly communicate with our professor and the client to refine the project scope as needed.

Within scope: what activities and resources lie within the scope of this project?
- An instructional plan for 2-3 hours of learner contact time.
- Performance-based training is planned.
- Job aids are developed where appropriate.

Outside scope: what activities and resources lie outside the scope of this project?
- Addressing any performance gaps relating to factors other than those that arise from a lack of feedback and skill. The client will be informed of these factors and encouraged to investigate them separately from this project.
- Designing prerequisite training.

Roles and Responsibilities
Team roles and responsibilities will be established through the following methods:

Division of assignment responsibilities
- Each member will contribute to Google docs drafts and shared electronic documents.
- A rotation cycle will be used to guide assignment designations and submissions.
- Each member will strive to fulfill their assigned role for each deliverable phase.
- Each member is responsible for being aware of deadlines recorded in Asana.
- Individual deliverable progress is updated by the assigned deliverable lead and tracked through Asana.
- Deviations from assignments will be communicated to the team promptly to allow for cooperative teamwork and restructuring of assignments.

Support for meeting assignment responsibilities
- Deliverable deadlines will be posted for all group members to reference and adhere to in Asana.
- Project management decisions and design changes are tracked and logged by the team in Asana.
- Team members meet weekly via Google Hangouts and communicate throughout the week on Google Docs and Asana.

Adjusting assignment responsibilities
- Any adjustments in assignment selections and deadlines will be promptly communicated via email and updated on Asana.
• Each member agrees to respond to and verify any changes or adjustments.

Managing inputs and resources
• All team members will provide input and feedback on assignments prior to submission via Google Docs.
• Team input will be combined, discussed, and clarified prior to assignment submission through color coding and commenting.
• All team members will review each assignment by internal review deadlines and indicate their completed internal review via an Asana subtask checklist.

Team Roles
• Project Author: James Snookes is the project author. James contacted AWARE to see if they were interested in working with a trainee instructional design team to solve a skill based performance problem within their organization. Upon AWARE’s reply, James worked with AWARE to qualify this project. James will be the primary liaison with the client/SME, and incumbents.
• Client, Key Stakeholder, and SME: Mandy Cole is the client and the subject matter expert. As of yet, there are no proxies available.
• Deliverable Leads: The team will assign members to act as deliverable leads. Each lead is responsible for creating a templated draft of their assigned deliverable in Google Docs and attaching the link to the draft in Asana, along with the rubric and any additional resources. Also, each lead is responsible for ensuring progress toward submission are updated via Asana subtasks. The deliverable lead is responsible for converting the final version of the deliverable into a Word Document, submitting it in Blackboard, and emailing our professor upon successful submission to Blackboard.

Project Coordination
Successful team project coordination will be accomplished through the following methods:
• Project deliverables are coordinated and aligned with one another.
• All deliverables will be coordinated via Asana and Google Docs.
• All deliverables are aligned with the rubric and feedback from the professor.
• Deliverables are reviewed by the client in a way that is effective for the team and the client.
• Deliverables will be presented to the client via an email or link.
• These documents will be via Google Docs for review.
• File tracking mechanisms may be used to ensure that the client is providing timely feedback, if necessary.
• Deliverables are created and submitted in a timely manner.
• Team members are expected to complete their assignments, or pieces of assignments, by the agreed upon deadlines.
• As soon as it becomes apparent that a deadline cannot be met, it is the responsibility of the individual team member to notify all other team members via email or text message depending on the urgency.
• Any deviation from the team plan is promptly communicated via Asana, with recognition and support from all team members.
• Each team member has “signed off” on each submitted assignment.
• The team will work collaboratively during the draft phase of each deliverable, with a primary author assigned to submit the final version.
• The primary author will compile all contributions into a cohesive draft, which will be reviewed by all team members in Google Docs by the agreed upon deadlines recorded in the Asana subtasks of each deliverable.

Figure 1. Below is an example of how the edits/reviews will be delegated and completed using Asana:

Team charter (11 points)

The team will create and agree to a team charter to determine how you will work together to complete the ID project. It will specify the successes your team hopes to deliver, how you will manage the project, and how you will together as a team. Team charters also address mechanisms to put into action if the unanticipated occurs, such as if a team member has a prolonged absence, if a client is changing the scope, if ID tasks are taking longer than planned. These are all possible risks that may need to be mitigated. Having a “go-to emergency” plan provides a mechanism for team members to keep the project moving forward.
The team will implement a review schedule to track document progress. The team will use Asana tasks and subtasks with assignments and deadlines (see figure 1) to assign and track document progress. The following table describes the workflow:

<table>
<thead>
<tr>
<th>Document</th>
<th>Team Member</th>
<th>Deadline</th>
<th>Status/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Charter draft created in Google Docs</td>
<td>Valen Anderson (primary author)</td>
<td>September 10, 2018</td>
<td>Utilized template provided</td>
</tr>
<tr>
<td>All team members contribute to the first draft</td>
<td>Reviewers: James Snookes, Joel Strasser, Jessica Stratton¹</td>
<td>September 13, 2018</td>
<td></td>
</tr>
<tr>
<td>Team Charter finalized on Google Docs for team review; team members use the suggested edits &amp; tracking function</td>
<td>Valen Anderson, James Snookes, Joel Strasser, Jessica Stratton</td>
<td>September 14, 2018</td>
<td>Team members use Asana to log and track when their review is completed.</td>
</tr>
<tr>
<td>Team Charter converted into a Word Document for submission</td>
<td>Valen Anderson</td>
<td>September 15, 2018</td>
<td>Posted to Blackboard</td>
</tr>
</tbody>
</table>

- Each team member has the knowledge and skill required for each deliverable.
  - Team members are aware of established group processes.
  - Team members are aware of their deliverables, responsibilities, and deadlines.
  - Team members have formal education in design principles.
  - Team members have experience from which they can draw to inform their decision-making process.
  - Team members understand the established communication process and mediums (Blackboard, Google Docs, Email, and Asana).
  - The group has established intragroup feedback expectations.

¹ This team member dropped out at the end of September 2018.
Communications
Team communication will occur through the following methods:

Medium
- The team will utilize Asana as a Project Management medium, as well as Google Docs for drafting and reviewing deliverables.
- Team questions for the professor will be posted on Blackboard and all final deliverables are submitted on Blackboard.
- Updates about team progress are shared internally on Asana, and externally via Blackboard when appropriate.

Procedures
- The team has established weekly Monday Google Hangout meetings at 8PM PST, which may be adjusted as needed.
- When sending email communication and submitting deliverables, the names of all team members will be included to ensure alignment.
- Meetings and communications with the client are minuted and recorded, and will be maintained in Google Docs and/or Asana.

Contact Escalation Plan

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Preferred Communication Method</th>
<th>Escalation Method 1 (24 hours without contact)</th>
<th>Escalation Method 2 (48 hours without contact)</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Snookes</td>
<td>Asana Conversation</td>
<td>Text (**<em>) <em><strong>_</strong></em></em></td>
<td>Call (**<em>) <em><strong>_</strong></em></em></td>
</tr>
<tr>
<td>Jessica Stratton</td>
<td>Asana Conversation</td>
<td>Text (**<em>) <em><strong>_</strong></em></em></td>
<td>Call (**<em>) <em><strong>_</strong></em></em></td>
</tr>
<tr>
<td>Joel Strasser</td>
<td>Asana Conversation</td>
<td>Text (**<em>) <em><strong>_</strong></em></em></td>
<td>Call (**<em>) <em><strong>_</strong></em></em></td>
</tr>
<tr>
<td>Valen Anderson</td>
<td>Asana Conversation</td>
<td>Text (**<em>) <em><strong>_</strong></em></em></td>
<td>Call (**<em>) <em><strong>_</strong></em></em></td>
</tr>
</tbody>
</table>

Communication quality
- All communication between team members will be delivered in a professional manner with clear expectations and input from all members.
- During meetings, the team will follow a prepared agenda and every question should be clearly answered before moving on to the next.
- Each will contribute to the greater good of the project’s development in a timely manner to positively further its progress.
- The team agrees to ask for help whenever needed from each other and the professor.
• In the event of workload imbalance, each team member agrees to communicate their need or willingness to help.
• The team has also agreed to update one another on other personal happenings that may impact his or her availability.

Project Teaming

Team Accountability

Team accountability will be established and maintained through the following practices:

• Team members will utilize the established communication process.
• Team members will maintain established feedback standards.
• Team members will adhere to the established project timeline.
• Team members will solicit feedback and utilize it towards project improvement.
• If conflict arises, team members agree to adhere to the established Conflict Resolution Process and accept the decided outcome.

Conflict Recognition and Resolution

The team will implement the following conflict recognition and resolution strategies:

The team will recognize and openly acknowledge disagreement if it occurs – including these two basic types of disagreement:

Controversy

• Controversies will be acknowledged in the group discussion board or on Asana.
• Team members will participate in the discussion in a positive manner and will not resort to negative or accusatory language.
• The first attempt to resolve the controversy will call for unanimous agreement.
• If a unanimous agreement is not achieved
  • A simple majority in votes will prevail.
  • If no majority is achievable, the project author will make the final decision.

Conflicts of interests

• Conflicts of Interest will be acknowledged in the Asana.
• Team members agree to be proactive in resolving conflicts of interest. Situations will be addressed individually with all members involved. The situation will be considered resolved once a unanimous decision has been reached.
• If a unanimous decision is not achieved:
  • A simple majority in votes will prevail.
  • If no majority is achievable, the project author will make the final decision.
Continuous Team Improvement

The team will continuously improve how it performs. The team will:

- Meet weekly and set aside time to discuss specific ways the team can improve.
- Team meeting agendas will include the following items to ensure we systematically approach team improvement.
  - Opportunities for improvement
  - Workload balance
- Feedback is encouraged during our meetings to reflect on what is going well and what we can improve upon.
- Any feedback from the client or professor will be taken seriously and acted upon.

Signatures

Our signatures below indicate our agreement to use this team charter to deliver a successful instructional design project.

Joel Strasser
Valen Anderson
Jessica Sothern
Project Description

Conducting Effective Supervision Meetings

Information About AWARE

Location
Sponsor Location: Multiple locations within Juneau, AK

Services AWARE Provides
There are two main divisions at AWARE. First, AWARE provides safe shelter and supportive services for people who have been subject to domestic or sexual violence. Secondly, AWARE effects the social, political and legal changes needed to eliminate oppression and gender based violence.

Site Client

Job Title
Deputy Director

Major Responsibilities
• Provide or ensure staff training in areas related to AWARE’s mission, including evaluation of performance of victim service, transitional housing, and other staff.
• Ensure completion of quarterly services reports.
• Prepare funding proposals.
• Act as records custodian.
• Attend administrative meetings and staff trainings.
Information About the Project

How did this project come up?
A Boise State University student in the Organizational Performance and Workplace Learning department approached AWARE to determine whether the organization was suffering from a performance gap related to skills and knowledge, and whether they would benefit from working with a student instructional design team to develop training to close the performance gap. Initial meetings were conducted with the AWARE deputy director and the volunteer coordinator to identify performance problems faced by AWARE. The top priority for the deputy director was for AWARE staff that directly report to a supervisor to have increased emotional resilience, job satisfaction, and opportunities for growth into leadership roles. This is important because AWARE direct reports need to be able to effectively provide AWARE’s services to both survivors and systemic partners. If AWARE is unable to do this effectively, their reputation will suffer which will jeopardize their funding. Most importantly to the deputy director, people will suffer danger and harm if AWARE is ineffective.

Why is this project being proposed?
Currently, AWARE supervisors are not consistently holding timely supervision meetings with their direct reports, nor are the contents of supervision meetings consistently effective in providing focus, structure, guidance, and support. As a result, the deputy director has observed that the supervisor direct reports are having inconsistent development regarding their emotional resilience, especially when it comes to their secondary trauma experienced at work. Not only does this impact AWARE’s ability to effectively provide their service model to victims and systemic partners, this has an impact on the direct reports’ welfare. The deputy director wants AWARE employees to not only be well, but to grow inside AWARE’s environment. Job satisfaction is suffering and the deputy director has stated that the organizational result is staff turnover is too high.

Supervision meetings involve tricky decision making, messy problem solving, complex situation recognition, and advanced communication skills; therefore, a job aid alone is not sufficient to close the performance gap in supervision meetings. Although the deputy director identified a number of areas for supervisor improvement, both the site client and the project author identified the supervisors’ performance in supervision meetings as being within the scope of this project. Other environmental factors contributing to the holding of effective supervision meetings are not within the scope of this project nor are any supervisor performance gaps outside supervision meetings.

Why is it being proposed now?
The organization has tripled the number of employees from 10 to 30, and dramatically increased their program over the past ten years. Infrastructure to support the employees delivering the programming has not kept pace with program growth. This has caused a leadership gap, and the growth potential of employees is not being sufficiently exploited in order to fill this gap. AWARE leadership are engaged in many tasks that could be performed by supervisors or their
direct reports. This means AWARE has an opportunity to increase organizational performance and more effectively implement their mission and strategic business objectives of:

1. providing direct services to victims, and
2. affecting social and political change to prevent systemic domestic or sexual violence.

Team Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valen Anderson</td>
<td>v*@gmail.com (<em><strong>)-</strong></em>-****</td>
<td></td>
</tr>
<tr>
<td>James Snookes</td>
<td>ja*@u.boisestate.edu (<em><strong>)-</strong></em>-****</td>
<td></td>
</tr>
<tr>
<td>Joel Strasser</td>
<td>jo*@u.boisestate.edu (<em><strong>)-</strong></em>-****</td>
<td></td>
</tr>
<tr>
<td>Jessica Stratton</td>
<td>jes*@u.boisestate.edu (<em><strong>)-</strong></em>-****</td>
<td></td>
</tr>
</tbody>
</table>

Project Schedule

<table>
<thead>
<tr>
<th>Assigned To</th>
<th>Deliverable</th>
<th>Deadline 2018</th>
</tr>
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<tbody>
<tr>
<td>James</td>
<td>Project Description</td>
<td>Internal Review 9/12</td>
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<tr>
<td></td>
<td>Pass 1</td>
<td>9/15</td>
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<tr>
<td></td>
<td>Pass 2</td>
<td>9/19</td>
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<tr>
<td>Valen</td>
<td>Team Charter</td>
<td>Internal Review 9/12</td>
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<tr>
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<td>Pass 1</td>
<td>9/15</td>
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<tr>
<td>Joel</td>
<td>Team Project Status Review 1</td>
<td>Internal Review 9/12</td>
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<tr>
<td></td>
<td>Submit</td>
<td>9/15</td>
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<tr>
<td>James</td>
<td>Deliverable Review 1 with Uber Client</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>9/16</td>
</tr>
<tr>
<td>James</td>
<td>Data Instrument: Site Client Interview</td>
<td>Internal Review 9/15</td>
</tr>
<tr>
<td>Name</td>
<td>Task</td>
<td>Stage</td>
</tr>
<tr>
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<td>-------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>James</td>
<td>Data Instrument: Job Incumbents Survey</td>
<td>Final Draft</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Internal Review</td>
</tr>
<tr>
<td>James</td>
<td>Gather Data: Site Client Interview</td>
<td>9/16</td>
</tr>
<tr>
<td>James</td>
<td>Gather Data: Incumbent Survey</td>
<td>9/17</td>
</tr>
<tr>
<td>Jessica</td>
<td>Performance Analysis</td>
<td>Internal Review</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Site Client Review²</td>
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<tr>
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<td></td>
<td>Pass 1</td>
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</tr>
<tr>
<td>Joel</td>
<td>Team Wellness Check</td>
<td>9/24</td>
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<td>James</td>
<td>Data Instrument: SME Task Analysis Interview</td>
<td>Internal Review</td>
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<tr>
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<td>Site Client Review*</td>
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<tr>
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<tr>
<td>James</td>
<td>Deliverable Review 2 with Uber Client</td>
<td>9/30</td>
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<tr>
<td>Valen</td>
<td>Team Wellness Check</td>
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<tr>
<td>Joel</td>
<td>Team Project Status Review 2</td>
<td>Internal Review</td>
</tr>
</tbody>
</table>

² All client reviews are subject to change, depending on client’s desired involvement.
<table>
<thead>
<tr>
<th>Name</th>
<th>Task</th>
<th>Submit Date</th>
<th>Status</th>
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<tbody>
<tr>
<td>Jessica</td>
<td>Team Wellness Check</td>
<td>9/28</td>
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</tr>
<tr>
<td>Joel</td>
<td>Learner Analysis</td>
<td>10/8</td>
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</tr>
<tr>
<td></td>
<td>Internal Review</td>
<td>10/10</td>
<td></td>
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<tr>
<td></td>
<td>Site Client Review*</td>
<td>10/11</td>
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<td></td>
<td>Pass 1</td>
<td>10/13</td>
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<td>Pass 2</td>
<td>10/20</td>
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<tr>
<td>James</td>
<td>Team Wellness Check</td>
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<tr>
<td>Jessica</td>
<td>Objectives</td>
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<td>Internal Review</td>
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<td></td>
<td>Site Client Review*</td>
<td>10/18</td>
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<td></td>
<td>Pass 1</td>
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<tr>
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<td>Pass 2</td>
<td>10/27</td>
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</tr>
<tr>
<td>Joel</td>
<td>Team Wellness Check</td>
<td>10/22</td>
<td></td>
</tr>
<tr>
<td>Valen</td>
<td>Performance Assessment Instrument</td>
<td>10/24</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internal Review</td>
<td>10/24</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Site Client Review*</td>
<td>10/25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pass 1</td>
<td>10/27</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pass 2</td>
<td>11/03</td>
<td></td>
</tr>
<tr>
<td>Valen</td>
<td>Team Wellness Check</td>
<td>10/29</td>
<td></td>
</tr>
<tr>
<td>Joel</td>
<td>Instructional Plan Worksheet</td>
<td>10/31</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Internal Review</td>
<td>10/31</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Site Client Review*</td>
<td>11/1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pass 1</td>
<td>11/4</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pass 2</td>
<td>11/17</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Activity</td>
<td>Type</td>
<td>Date</td>
</tr>
<tr>
<td>--------</td>
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<td>-------</td>
</tr>
<tr>
<td>Joel</td>
<td>Team Project Status Review 3</td>
<td>Internal Review Submit</td>
<td>11/5 11/6</td>
</tr>
<tr>
<td>Jessica</td>
<td>Team Wellness Check</td>
<td></td>
<td>11/7</td>
</tr>
<tr>
<td>James</td>
<td>Deliverable Review 3 with Uber Client</td>
<td></td>
<td>11/7</td>
</tr>
<tr>
<td>James</td>
<td>Team Wellness Check</td>
<td></td>
<td>11/12</td>
</tr>
<tr>
<td>Joel</td>
<td>Team Wellness Check</td>
<td></td>
<td>11/19</td>
</tr>
<tr>
<td>Valen</td>
<td>Team Wellness Check</td>
<td></td>
<td>10/22</td>
</tr>
<tr>
<td>Valen</td>
<td>Instructional Plan Review</td>
<td>Submit</td>
<td>12/2</td>
</tr>
</tbody>
</table>
## Performance Analysis

### Gap Analysis

<table>
<thead>
<tr>
<th>Desired Performance</th>
<th>Target Population</th>
<th>Performance</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>What we want our AWARE supervisors to do is hold supervision meetings with direct reports</td>
<td>to do is hold supervision meetings with direct reports</td>
<td>that result in:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Supervisors reporting a mean response above 5.1 (out of 6) for their direct reports’ ability to independently make decisions and take action.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Upper-management reporting an average of 10% of their time spent on tasks beyond their job role.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actual Performance</th>
<th>Target Population</th>
<th>Performance</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>What our AWARE supervisors are doing now is holding supervision meetings with direct reports</td>
<td></td>
<td>that result in:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Supervisors reporting a mean response of 4.1(^3) (out of 6) for their direct reports’ ability to independently make decisions and take action.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Upper-management reporting an average of 30%(^4) of their time spent on tasks beyond their job role.</td>
<td></td>
</tr>
</tbody>
</table>

---

\(^3\) AWARE supervisors were asked, “Currently, my direct reports independently make decisions and independently take action in their job responsibilities” in a survey that ran from 4th - 8th of October 2018. Sample size was eleven. Nine responded and rated their answer from 1 (never) to 6 (always). 1 responded 3 (1x3), 6 responded 4 (6x4), and 2 responded 5 (2x5). The total was divided by the number of respondents (37/9) giving a mean of 4.1.

\(^4\) AWARE upper-management were asked, “what percentage of your time was spent on tasks beyond your job role (for the month of September)?” in a survey that ran from 4th - 8th of October 2018. The sample size was four, and 3 responded. 1 responded 40%, 1 responded 30%, and 1 responded 20%. The average was calculated (40+30+20)/3=30.
Organizational Analysis

Mission
AWARE’s mission is to provide direct services to survivors of domestic or sexual violence and to affect the social and political systemic changes to address oppression.

Strategic Organizational Objective
One of AWARE’s most important goals is for their service model to be effective in both reducing systemic oppression and the physical danger of individual victims. In order to achieve this goal, AWARE’s leadership have identified a strategic organizational objective:

★ *Increasing time and focus on value-producing goals.*

Linking the Performance Gap With the Strategic Organizational Objectives

Supervision Meetings
AWARE has twenty nine members of staff across both departments that directly report to a supervisor. Due to funding regulations, direct reports are required to have regular supervision in the form of meetings with a supervisor. Upper-management also hold supervision meetings with the nine AWARE supervisors. Direct reports across the whole of AWARE come to supervision meetings to receive support through mentoring, guidance, feedback, planning, and direction.

Direct Report Job Duties
Supervision meetings provide an opportunity for supervisors to direct and guide direct reports in independently carrying out their job role duties. Additionally, regular supervision meetings should support all staff members that report to a supervisor in their leadership development and potential.

Overburdened
The more direct reports need assistance in carrying out their job role duties, the less time supervisors are able to spend on their own value producing job role. In turn, this impacts upper-management’s ability to focus on their job role tasks. Currently, on average, upper-management report spending 30% of their time on tasks beyond their job roles.

Conducting regular, effective supervision meetings will enable supervisors and upper-management to increase the time and focus they spend on the value producing tasks of their management job roles. This will help to ensure AWARE’s service model is effective in both reducing systemic oppression and the physical danger to individual victims in the South East Alaska community.
Cause Analysis

Data Gathering Methods

<table>
<thead>
<tr>
<th>Data sources</th>
<th>Data gathering methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Client</td>
<td>In person interview with the AWARE deputy director</td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td>In person interview with the AWARE deputy director</td>
</tr>
<tr>
<td>Supervisors</td>
<td>Online survey</td>
</tr>
<tr>
<td>Direct Reports (respondents includes supervisors that report to upper-management)</td>
<td>Online survey</td>
</tr>
</tbody>
</table>

Findings

In the site client interview, the site client reported that:

- Supervisors have a willingness to help people but there is not consistent exemplary performance in conducting effective supervision meetings.
- Supervisors do not know where to focus the meeting or their feedback.
- Supervisors do not know how to keep their communication contained within job duty domains.

This shows that AWARE supervisors do not know how to conduct effective supervision meetings.

In the subject matter expert (SME) interview, the SME reported:

- Supervisors do not know how to get direct reports to talk about job duty challenges when the direct report is showing reluctance.
- Supervisors do not know how to get direct reports to talk about job duty wins when the direct report is showing reluctance.
- Supervisors do not know how to communicate to direct reports the need to keep job tasks within their relevant job roles.
- Supervisors do not know how to assist direct reports in setting valued goals.

This further shows that AWARE supervisors do not know how to conduct effective supervision meetings.

In the supervisor survey:

- 44% of respondents report discussing job duty wins with direct reports a total of 1-4 times.
- 56% of respondents consider getting direct reports to talk openly and willingly about job duty challenges as being complex, difficult, and critical.
- Despite 88% of respondents reporting experience assisting direct reports in setting goals, 78% of supervisors consider setting valued goals as being complex, difficult, and critical.
This data further corroborates that supervisors do not know how to ensure effective communication regarding job duty wins, job duty challenges, and setting valued goals.

In the direct report survey:

- 55% of respondents report supervisors have not assisted them in setting goals more than 4 times.
- 50% of respondents report supervisors asking them about job duty challenges fewer than 10 times.
- 55% of respondents report supervisors asking them about job duty wins fewer than 10 times.

This data further supports the case that supervisors are lacking experience in ensuring effective communication regarding job duty wins, job duty challenges, and setting valued goals.
Other Causes for the Gap

As can be seen in Table 1, there are multiple causes for the identified gap that are out of the scope of this Instructional Design project. It is important to note that the gap identified in this analysis will not be closed unless all causes are addressed. Table 2 shows that the ID team’s responsibility is addressing guidance and skill. The client is responsible for all other sources of the gap.

Table 1. Gilbert’s Updated Behavioral Engineering Model (Chevalier, 2003)

<table>
<thead>
<tr>
<th>1. Information: Data</th>
<th>2. Instrumentation: Resources</th>
<th>3. Motivation: Incentives</th>
</tr>
</thead>
<tbody>
<tr>
<td>● 55% of supervisor survey respondents disagree that there are clear standards and expectations regarding supervision meetings.</td>
<td>● According to the site client, all supervisors have computers with access to the Google Suite.</td>
<td>According to the site client:</td>
</tr>
<tr>
<td>● According the site client, there is minimal, informal, and inconsistent guidance and direction regarding supervision meetings.</td>
<td>● According to the site client, all supervisors have an office (with a door) to hold the meetings.</td>
<td>● Supervisors are adequately compensated.</td>
</tr>
<tr>
<td>● According the site client, there is no mechanism in place for feedback other than the formative annual performance evaluation.</td>
<td></td>
<td>● There is no reward for exemplary performance.</td>
</tr>
</tbody>
</table>

6. Information: Knowledge

Supervision meetings require complex dynamic communication, and complex decision making (see previous section, Findings).

5. Instrumentation: Capacity

● The site client reported that employees are promoted to the position of supervisor based on factors other than their supervision ability.

4. Motivation: Motives

● According to the site client’s observations, supervisors are motivated by AWARE’s mission; however, the site client observes that not all supervisors are motivated to conduct consistent meetings.

● The direct report survey (which includes supervisors that report to upper management) shows that 85% of respondents strongly agree with being proud to work for AWARE and the remaining 15% agreeing.

Table 2. What the ID team is responsible for, and what the client is responsible for.
<table>
<thead>
<tr>
<th>1. <strong>Information: Data</strong></th>
<th>2. <strong>Instrumentation: Resources</strong></th>
<th>3. <strong>Motivation: Incentives</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• ID team is responsible for <strong>guidance</strong> and will address this with job aids.</td>
<td>Client’s responsibility</td>
<td>Client’s responsibility</td>
</tr>
<tr>
<td>All other data related causes are the client’s responsibility</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6. <strong>Information: Knowledge</strong></th>
<th>5. <strong>Instrumentation: Capacity</strong></th>
<th>4. <strong>Motivation: Motives</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• ID team is responsible for <strong>skill</strong> and will address this by designing training.</td>
<td>Client’s responsibility</td>
<td>Client’s responsibility</td>
</tr>
</tbody>
</table>
## Job Aid / EPSS Analysis

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes/ No</th>
<th>How do you know? What evidence (data/findings) can you provide to support your answer?</th>
</tr>
</thead>
</table>
| 1. Is it important for people to practice the task to mastery? Or can people perform the job task without a significant amount of practice? | Yes     | Critical aspects of supervision meetings are determining ways to get direct reports to talk openly and willingly about their job duty challenges, their job duty wins, and assisting the direct reports in setting valued goals. These tasks require complex cognitive and communication actions that supervisors will have to practice to master.  
   - The site client stated that supervision meetings require complex cognitive operations and have invisible elements.  
   - 56% of supervisor survey respondents consider getting direct reports to talk openly and willingly about job duty challenges as being complex, difficult, and critical.  
   - Despite 88% of supervisor survey respondents reporting experience assisting direct reports in setting goals, 78% of supervisors consider setting valued goals as being complex, difficult, and critical. |
| 2. Is it important for people to obtain both:  
  ● Coaching (including error detection and correction) as they perform a task?  
  ● Delayed feedback (about the extent to which performance met standards and how to improve it) after they perform a task? | Yes     | Determining ways to get direct reports to talk openly and willingly about their job duty challenges, their job duty wins are nuanced tasks with invisible cognitive elements.  
   - The site client stated that supervision meetings require complex cognitive operations and have invisible elements.  
   - When trying to get reluctant direct reports to talk about challenges, the subject matter expert pointed out invisible elements such as direct reports not wanting to show weakness, thinking they will be judged by their supervisor, or thinking their supervisor won’t be able to help.  
To master these meetings, supervisors will need to receive coaching in being able to detect and correct their errors. Additionally, they will need delayed feedback after conducting supervision meetings. |
3. **Is it important to provide learners with a safe, controlled environment in which they can make mistakes as they learn?**

   **Yes**

   Supervisors need to practice supervision meeting tasks in a safe, controlled environment because this will eliminate real-world consequences of mistakes.
   - The subject matter expert pointed out that when talking about workplace challenges, direct reports may want to talk about the traumatic experiences of their clients, and the resultant secondary trauma they are experiencing.
   - The site client states that at worst, the negative real-world consequences are risks to the safety of clients they serve and the emotional well-being of employees.

4. **Is there an expectation of interactive learning?**

   **Yes**

   - The site client stated that there is an expectation of interactive learning in their team at AWARE.
   - 33% of supervisor survey respondents want their training to be interactive.
   - 67% of supervisor survey respondents want their training to be both interactive and independent.

5. **Are people required to perform the task quickly and smoothly in the workplace?**

   **Yes**

   - The site client stated that it is important for supervisors to be able to communicate quickly and smoothly in supervision meetings without the need of a job aid.
   - A need for fluency is especially important when determining ways to get direct reports to talk openly and willingly about their job duty challenges, their job duty wins, and assisting the direct reports in setting valued goals. The subject matter expert said that these tasks require multiple invisible decision considerations.

6. **Are people required to perform the task in situations that are unpredictable?**

   **Yes**

   The site client pointed out that due to the difficult nature of AWARE’s direct service interventions and prevention work, what is encountered in the workplace by direct reports is unpredictable.

7. **Does one or more of the following reasons for NOT relying on a job aid alone exist in the on-the-job environment:**

   - A physical barrier that makes it difficult to use

   **No**

   The site client reports no physical or social barriers to the use of a job aid in the workplace. Each supervisor has an office that is suitable for the use of a job aid.
a job aid on the job
- A social barrier that makes it difficult to use a job aid on the job

Summarizing the Case for Training

Supervision meetings at AWARE should support direct reports in both independently carrying out their job role duties and in developing their leadership potential. Currently, upper-management at AWARE are spending as much as 40% of their time on tasks beyond their job role. A key strategic organizational objective for AWARE’s deputy director is to increase the time and focus upper-management spend on their own value producing job roles. The deputy director has drawn a straight line between this strategic objective and the need to conduct effective supervision meetings. One cause of the supervision meeting performance gap is due to a lack of skill and knowledge.

The critical aspects of supervision meetings are determining ways to get direct reports to talk openly and willingly about their job duty challenges, their job duty wins, and assisting the direct reports in setting valued goals. These critical tasks have been identified as cognitively complex and communicationally dynamic by the AWARE client, subject matter expert, and the supervisors. The AWARE subject matter expert has shown that these critical tasks require considerations that are invisible and hard to observe; therefore, a job aid alone cannot solve the matter. For supervisors to build the skills necessary to make the right decisions when navigating messy communications with direct reports, they will need a safe environment to practice and to receive coaching that will enable them to detect their errors and correct them.
# Task Analysis

## Data Sources

<table>
<thead>
<tr>
<th>Selected Task Analysis Method</th>
<th>Rationale</th>
<th>Data Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procedural task analysis with: ● If-Then tables ● Complex tables ● Cautionary notes, hot tips, and highlighting</td>
<td>● The task involves a series of sequential steps and decision-making skills ● If-Then tables to represent simple decision-making processes ● Complex tables to represent the questions that exemplary performers ask themselves to reach a decision</td>
<td>● Interview with AWARE exemplary performer (Deputy Director) ● Survey (sent to all supervisors; target audience) ● AWARE website ● Extant Data: Literature Review</td>
</tr>
</tbody>
</table>

## Task Characteristics

<table>
<thead>
<tr>
<th>Task Characteristic</th>
<th>Description</th>
</tr>
</thead>
</table>
| Major tasks               | 1. Prepare for the meeting  
2. Facilitate the meeting  
   2.1. Ask about wins  
   2.2. Ask about challenges  
   2.3. Set 1-2 goals for the following week  
3. Follow up on the meeting |
| Goals for each major task | Individual  
1. Prepare: Direct reports will self-report agreement that their supervisor comes to supervision meetings organized and prepared.  
2. Facilitate:  
   2.1. Wins: Direct reports will self-report increased confidence and ability in independently overcoming  
Organizational  
1. Prepare: Increased job satisfaction and decreased attrition for AWARE direct reports.  
2.1 - 2.3 Facilitate:  
   Supervisors will self-report an increase in their direct reports independently making decisions and independently |
<table>
<thead>
<tr>
<th>Challenges at work.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.2. Challenges: Direct reports will self-report that their efforts at work are worthwhile and contribute to the success of AWARE.</td>
</tr>
<tr>
<td>2.3. Goals: Direct reports will self-report increased focus and direction.</td>
</tr>
<tr>
<td>3. Follow up: Direct reports will self-report agreement that their supervisor follows through on what they say they will do.</td>
</tr>
<tr>
<td>taking actions. Upper management will self-report a decrease in percentage of their time spent on tasks beyond their job role.</td>
</tr>
<tr>
<td>3. Follow up: Increased job satisfaction and decreased attrition.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cues</th>
</tr>
</thead>
<tbody>
<tr>
<td>● AWARE supervisors are required to schedule a supervision meeting with their direct reports weekly.</td>
</tr>
<tr>
<td>● Supervisors have the autonomy to schedule the weekly meetings when they work best, as well as the responsibility to carry them out regularly as outlined.</td>
</tr>
<tr>
<td>● Occasionally, direct reports will request a check-in with their supervisor at irregular times as needs arise.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are no existing recorded standards, directions, specified tools, or materials in use for this task.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Standards that the completed task should meet</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Meeting structure</td>
</tr>
<tr>
<td>○ Consistently schedule meetings on a weekly basis</td>
</tr>
<tr>
<td>○ Conduct meetings that last between 15-30 minutes</td>
</tr>
<tr>
<td>● Meeting outcomes</td>
</tr>
<tr>
<td>○ Discover any job duty challenges and help direct reports to focus on independently overcoming their challenges.</td>
</tr>
<tr>
<td>○ Discover authentic job duty wins and follow through with publicly recognizing wins that are inspirational or useful in solving problems.</td>
</tr>
<tr>
<td>○ Assist in setting valued goals that are aligned with AWARE’s mission.</td>
</tr>
<tr>
<td>○ Consistently record weekly goals and follow AWARE’s goal setting guidelines.</td>
</tr>
<tr>
<td>○ Consistently follow-up with previously set goals</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Prerequisite skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Ability to communicate clearly verbally and in writing.</td>
</tr>
<tr>
<td>● Ability to align duties with AWARE’s mission, vision, and AWARE’s value of Direct Communication.</td>
</tr>
</tbody>
</table>
● Proficiency in using Google Calendar, Google Tasks, and Gmail.

Key

🔥 Hot Tip: Hints or advice.
⚠ Caution: Potential mistakes.
🛈 Design note: Additional information.
Orange: What learners cannot perform yet. What will be included in a worksheet job aid.
Green: What learners can perform using a job aid alone. The ID team is not responsible for creating these job aids.
White/No Highlight: What learners can perform, without a job aid.

Completed Task Analysis

1. **Prepare for the meeting before meeting with the direct report.**
   1.1. Review previously set goals for the direct report in preparation to ask about job duty wins and challenges.
   1.1.1. Review the previous week’s worksheet goal job aid.
   1.1.2. Open any relevant Google Tasks or Calendar events.
   1.1.3. Locate direct report’s goals (i.e. Jane’s Goals)
   1.2. Determine whether there are any carry-over issues from last week.

2. **Facilitate the meeting**
   2.1. Ask about job duty win(s) the direct report has had this week.

⚠ Caution: Direct reports may want to share a relational client success here. Instead of talking about a relational success, it’s important you talk about a direct report’s job duty or job performance win.

Job duty examples:

- *Frank has been focusing on keeping on top of important paperwork. This week, he submitted all paperwork on time by setting a 3 PM paperwork reminder using Google Tasks. This is cause for celebration.*
- *Georgie has been working on improving her time management skills this week. She had success prioritizing tasks and using a calendar to help her stick to a schedule. Celebrate!*

Relational win example (NOT the focus of this task):

- *Laura has an emotional breakthrough in connecting with a participant that’s having a hard time.*

🔥 Hot Tip: Prioritize discussing wins related to last week’s goals, but this should be an opportunity for both of you to celebrate any kind of job duty wins.
### 2.1.1. Celebrate the win.

<table>
<thead>
<tr>
<th>IF</th>
<th>THEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the direct report tells you about a job success</td>
<td>Congratulate them for the success without delay.</td>
</tr>
<tr>
<td>If the success is useful in solving a problem, or inspirational and authentic</td>
<td>Make a note to include this in the meeting follow-up: schedule a time to share the success story and recognize the direct report publicly.</td>
</tr>
</tbody>
</table>

### 2.2. Ask about the job duty challenge(s) the direct report experienced this week.

⚠ Caution: Direct reports may want to talk about a client-related emotional challenge here. Instead of talking about a relational client challenge, it’s important you talk about a direct report’s job duty or job performance challenge.

Job duty examples:
- Georgie is struggling to manage her time effectively. She feels like she doesn’t have enough time to get to some of her important job duties.
- Frank is having difficulty finding a good time to complete important paperwork. He gets busy in the mornings and forgets about it.

Relational challenge example (NOT the focus of this task):
- Laura was triggered by an emotional situation one of her clients is presenting.

🔥 Hot Tip: Prioritize discussing challenges related to last week’s goals, but this should be an opportunity for you to demonstrate to your direct report that you think what they have to say regarding any of their job duty challenges is valid and important.

#### 2.2.1. Acknowledge challenges.

##### 2.2.1.1. Validate what they’ve shared as challenging.

Example of phrasing to use:
- “You’ve shared ____, ___, and ____. I can see how that would be challenging.”

##### 2.2.1.2. Empathize with the difficulty of the challenge.

Examples of phrasing to use:
- “I remember when I faced a similar challenge at my last organization, so I can understand how it can be stressful.”
- “As you may already know, I haven’t dealt with this kind of issue before, I can only imagine how you feel.”

⚠ Caution: Don’t rush to fix their problems. Instead, emphasize validating what they’re dealing with is challenging and empathizing with them.

### 2.3. Assist the direct report in setting 1-2 goals.

⚠ This task will use a worksheet job aid.

#### 2.3.1. Assist direct reports that are reluctant to set goals.

##### 2.3.1.1. Determine whether or not the direct report is reluctant to set goals.

##### 2.3.1.1.1. Ask questions to determine their past experience with goals.

##### 2.3.1.1.2. Ask questions to determine their attitude toward setting goals.

##### 2.3.1.2. Reassure direct reports that are reluctant to set goals.
<table>
<thead>
<tr>
<th>Precursor (Inputs)</th>
<th>Action (Process)</th>
<th>Results (Outputs)</th>
<th>Interpretation (Decision Rule)</th>
</tr>
</thead>
<tbody>
<tr>
<td>● The supervisor values using goals as a tool.</td>
<td>● Tell them they only need to set one goal in these meetings.</td>
<td>● The direct report uses goals as a tool to improve their focus and direction at work.</td>
<td>It’s likely the direct report is reluctant to set goals because they:</td>
</tr>
<tr>
<td>● The direct report is reluctant to set goals.</td>
<td>● Tell them you want their goal to be small, manageable, and achievable.</td>
<td></td>
<td>● Overwhelm themselves with too many goals.</td>
</tr>
<tr>
<td></td>
<td>● Tell them your objective is to help them succeed, not to give them a hard time.</td>
<td></td>
<td>● Haven’t achieved their goals in the past.</td>
</tr>
<tr>
<td></td>
<td>● Tell them you want them to choose things they care about and value.</td>
<td></td>
<td>● Get anxious about reporting back to you that they haven’t achieved their goals.</td>
</tr>
<tr>
<td></td>
<td>● Tell them that everyone wins with a good goal.</td>
<td></td>
<td>● Don’t want to feel negative about themselves for not achieving their goals.</td>
</tr>
</tbody>
</table>

2.3.2. **Assist the direct report in writing 1-2 goals.**

2.3.2.1. **Generate ideas.**

2.3.2.1.1. Ask what are one or two of the most important things about their performance of their job duties that they personally want to improve.

2.3.2.1.2. Ask them to identify one or two barriers preventing them performing these job duties.

2.3.2.1.3. Ask them what job duties are causing them the most pain.

⚠ Caution: We want to help direct reports set goals that they can affect regarding their job duties. Don’t focus on what clients are presenting or other emotional relational issues they can’t control.

2.3.2.1.4. Ask them what is causing AWARE the most pain.
2.3.2.1.5. Ask them which ideas they can own and address independently.

<table>
<thead>
<tr>
<th><strong>IF</strong></th>
<th><strong>THEN</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>The generated idea is <strong>WITHIN THE SCOPE</strong> of the direct report’s responsibility</td>
<td>Keep these ideas as candidates for writing goals.</td>
</tr>
<tr>
<td>The generated idea is <strong>NOT WITHIN THE SCOPE</strong> of the direct report’s job responsibilities</td>
<td>Validate that their idea is indeed something that needs to be improved. However, emphasize that you want to help them set goals they can work on and have success in accomplishing. Discard this idea. Repeat task 2.3.2 until you’ve identified an idea within the scope of the direct report’s job responsibilities.</td>
</tr>
</tbody>
</table>

If the generated idea is **WITHIN THE SCOPE OF YOUR JOB** responsibilities | Thank them for bringing it to your attention, tell them you’ll work on addressing it, use Google Tasks to write down the task, and finally, discard this as a goal option. Repeat task 2.3.2 until you’ve identified an idea within the scope of the direct report’s job responsibilities. |

2.3.2.2. Ask them to write 1-2 goals for the coming week.

2.3.2.2.1. Write an action word, e.g. schedule, fill out, create.
2.3.2.2.2. Write what they will be acting upon, e.g. an appointment, paperwork, a daily schedule.
2.3.2.2.3. Write any other essential details to make the goal specific. **⚠ Caution:** Keep the goal small and manageable.

2.3.3. Verify the goals meet AWARE criteria.

2.3.3.1. Ask them if their goal aligns with AWARE’s mission and values.
2.3.3.1.1. Ask them if the idea helps provide direct services to survivors of domestic or sexual violence.
2.3.3.1.2. Ask them if the idea helps affect the social and political systemic changes.
2.3.3.1.3. Ask them if the idea will help them win in their job.
2.3.3.2. Ask them if they can address the goal independently.
2.3.3.3. Write down when they plan to carry out the action.
2.3.3.3.1. Ask them when they plan to carry out the action.
2.3.3.3.1.1. Encourage them to be as specific as they can be.
2.3.3.3.1.1.1. Ask them to think about they’re upcoming schedule and typical daily routines.
2.3.3.4. Write down how they will know they’ve achieved the goal.
2.3.3.4.1. Ask them how they will know they’ve achieved the goal.
2.3.3.5. Ask them if their goal is achievable before we meet again next week.

2.3.3.5.1. Set an achievable goal.

<table>
<thead>
<tr>
<th>IF</th>
<th>THEN</th>
</tr>
</thead>
<tbody>
<tr>
<td>If their goal is achievable within the coming week</td>
<td>Take no action</td>
</tr>
<tr>
<td>If their goal is not achievable within the coming week</td>
<td>Revise the goal. Suggest breaking the goal up into a series of smaller goals that have achievable weekly time frames.</td>
</tr>
</tbody>
</table>

3. **Follow up on the meeting.**

3.1. **Schedule next week’s supervision meeting with the direct report.**

3.1.1. **Use Google Calendar to create an event.**

3.1.2. **Add the direct report as a guest so it appears in their calendar too.**

3.2. **Use the note function in the Google Calendar event you created to record anything you need to act on.**

3.2.1. **Make a note here concerning the outcome of task 2.1.1.**

3.2.1.1. **Record the step-by-step the direct report took to solve a problem, so you can publicly celebrate and share this useful information.**

3.2.1.2. **Record the direct report’s success story that is inspirational.**

3.2.1.3. **Schedule when you will publicly share the useful success.**

3.2.2. **Use Google Calendar to create a separate personal event reminder to share your direct report’s success at the next public opportunity.**

🔥 **Hot Tip:** There is benefit in having the direct report be present and see you adding these follow up reminders. It lets them know it’s important to you and it acts as an extra incentive for you to not forget. Remembering these celebrations is critical in keeping your direct report’s trust and their sense you care.

List of What Is Critical, Difficult, and Complex

1. Determining whether or not the direct report is reluctant to set goals.
2. Assisting the direct reports in setting valued goals that are focused on increasing job role independence.
3. Aligning goals with AWARE’s mission, vision, and values.

Writing specific goals that begin with an action, specify a time, specify a clear target, and are time bound within a week.
Learner Analysis

Brief Description of the Learners

The learners are supervisors of AWARE, a non-profit located in Juneau, Alaska. All AWARE supervisors have different titles, for example, Prevention Director, Lead Children’s Advocate, or Advocacy Services Manager; however, what they all have in common is they supervise one or more staff members who directly report to them.

Sources and Methods

<table>
<thead>
<tr>
<th>Data Sources</th>
<th>Data Collection Method(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant survey</td>
<td>Online survey</td>
</tr>
<tr>
<td>Direct report survey</td>
<td>Online survey</td>
</tr>
<tr>
<td>Client Interview</td>
<td>In-person interview</td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td>In-person interview</td>
</tr>
</tbody>
</table>

Data-Gathering Instruments

- Face-to-face client interview: the project lead interviewed the AWARE deputy director on September 16th, 2018. Answers were recorded using a laptop and Google Docs. 55 pre-prepared questions were used with no unplanned questions.
- Face-to-face SME interview: the project lead interviewed the AWARE subject matter expert on September 25th, 2018. The interviewer came prepared with suggested main tasks and sub tasks. The interviewer used a laptop and the subject matter expert used a desktop to synchronously ask questions, answer questions, add details, and give feedback using a Google Document.
- Supervisor Survey: conducted using Google Forms from 4th - 8th of October 2018, with a sample size of 11 and a response rate of 82%.
- Direct Report Survey: conducted using Google Forms from 4th - 8th of October 2018, with a sample size of 30 and a response rate of 67%.
## Findings and Implications

### Relevant Skills

<table>
<thead>
<tr>
<th>Learner Characteristic</th>
<th>Findings</th>
<th>Data Source/Method</th>
<th>Instructional Implications</th>
</tr>
</thead>
</table>
| Prior Knowledge        | Learners have conducted supervision meetings at AWARE:  
  - 1-4 times: 11%  
  - 11-20 times: 11%  
  - 40+ times: 78%  
  Learners have conducted similar supervisory 1-on-1 meetings at other organizations:  
  - 0 times: 44%  
  - 5-10 times: 11%  
  - 40+ times: 44%  
  Direct reports report having supervision meetings with a supervisor:  
  - 3+ months: 10%  
  Once:  
  - a month: 20%  
  - every 2 weeks: 35%  
  - a week: 35% | Supervisor survey | Therefore, the **activation** phase will do the following:  
  - **Previous experience**  
    - Ask supervisors to share specific instances they assisted direct reports set goals.  
    - Ask learners to share goal setting methods or structures they currently use with their direct reports.  
  - **New experience**  
    - Share a basic visual representation of the new focus for assisting in setting goals.  
  - **Structure**  
    - Prior to the training event, ask supervisors to create goals using an advanced organizer that includes goal components (fill-in-the-blank) as well as the alignment criteria (checklist) to job duties and AWARE mission. |  |
| Targeted Skills | 78% of supervisors consider assisting direct reports in setting valued goals to be complex, difficult, and critical.

Learners have assisted someone in setting goals in a supervisory 1-on-1 meeting:
- 0 times: 11%
- 11-20 times: 33%
- 21-40 times: 11%
- 40+ times: 44%

Direct reports have been assisted in setting goals by their supervisors:
- 1-4 times: 50%
- 5-10 times: 5%
- 11-20 times: 5%
- 21-40 times: 20%
- 40+ times: 20%

### Supervisor survey

### Direct report survey

### Demonstration
- **Demonstration consistency**
  - In a supervision meeting role play, the entire goal setting task is demonstrated using the job aid worksheet, including assisting direct reports that are reluctant to set goals, generating goal ideas they can own, and meeting AWARE goal setting criteria.
  - Additional task demonstrations show varied situations such as reluctance due to not achieving their goals in the past and the direct report having difficulty identifying goal ideas they can own independently.

- **Learner guidance**
  - Clearly identify assisting direct reports that are reluctant to set goals as being a difficult task that is critical to success.
  - Clearly identify tasks associated with direct reports using goals to increase their independence as being critical. Additionally, explicitly state how getting this right will benefit them (supervisors).
  - Clearly identify the goal setting criteria on the job aid worksheet as being critical in helping direct reports successfully achieve their goals.

- **Relevant media**
  - Record videos of model role plays or real goal setting situations. Save the videos for use in future training sessions.

### Application
- **Practice consistency**
  - Have supervisors follow a worksheet job aid as they practice role playing with different partners. The same worksheet that will be used on the job.
  - Have learners take turns role playing supervisors and direct reports where the supervisor assists the direct report to set goals. Then they use the job aid to discuss what went well and what needs improvement.

- **Diminishing coaching**
  - Early on in role play practice, have one learner at a time role play the whole goal setting task in front of the group. To begin with, a “Simon Says” approach will be used where coaching will be provided at every step of the goal setting process. By the end, role
play scenarios will have increased in complexity and problem solving and the coaching will have diminished.

- So that everyone is getting practice, after giving feedback on the individual supervisors practice in front of the group, have the group break away into pairs to incorporate the feedback into their role play with a learner partner.
- As none of the supervisors are experienced with the new supervision meetings yet, the facilitator will move around the group as they pair practice listening for errors. The facilitator will pay particular attention to the difficult, complex, and critical aspects. At the end of pair role play, the facilitator will share their aggregated feedback to the group before moving onto the next practice.
- Each time there’s a new pair role play practice and the coaching is diminished, supervisors will rotate who they partner with.

- **Varied problems**
  - When role playing, there should be varied goals that have to be reworked to align with the goal setting guidelines: AWARE’s mission/vision/goals, workload/job role scope, what needs most improvement, etc.
  - When role playing, there should be varied problem cases to deal with. For example, the direct report wanting to set multiple goals, being reluctant due to not achieving goals in the past, being anxious about reporting back to their supervisor failure to achieve goals, etc.

Integration

- **Watch me**
  - Collect goals written by supervisors in previous role plays and distribute them to the other supervisors for review. Lead a discussion where supervisors point out wins and areas of opportunity in the goals they review.
  - After the training event, supervisors will have an opportunity to demonstrate their new knowledge by having their completed goal worksheet job aids from real supervision meetings reviewed by their fellow supervisors.

- **Reflection**
- Give supervisors a guided reflection worksheet and, with prompts, ask them to individually share their lessons learned.
  - Using the same worksheet, with prompts, ask supervisors to examine how the new knowledge about goal setting relates to the structure they’ve previously followed for goal setting.
- Creation
  - Learners are asked to think about their direct reports, and how they can apply what they’ve learned to assisting their direct reports set valued goals applicable to them and their individual needs.
  - Learners discuss their ideas in small groups.

### Relevant Contextual Factors

<table>
<thead>
<tr>
<th>Learner Characteristic</th>
<th>Findings</th>
<th>Data source/method</th>
<th>Instructional Implications:</th>
</tr>
</thead>
</table>
| Orienting Context—Learner motivations related to the job and any corresponding job training | 100% of learners are motivated to complete supervision meeting training:  
  - 44% strongly agree  
  - 44% agree  
  - 11% slightly agree  
  100% of supervisors agree that supervision meeting training will positively impact them, the direct reports, and AWARE:  
  - 56% strongly agree  
  - 22% agree  
  - 22% slightly agree  
  100% of supervisors agree that mastering effective supervision meetings is one of their core job responsibilities: | Supervisor survey | Therefore with supervisors who are ready and motivated to master the training, our messaging should focus on:  
  **Relevance Strategy:**  
  - we want these goals to be worthwhile to everyone. You, direct reports, AWARE directors, AWARE, and AWARE clients.  
  - we want supervision meetings to be a positive force for everyone. We want you, the supervisors to be perceived positively as you coach and celebrate direct reports’ successes.  
  - AWARE faces more challenges than other workplaces. We want supervision meetings to be an effective tool in removing obstacles.  
  **Confidence Strategy:**  
  - The facilitator should be ready to adapt the |
### Instructional Context—Any factors in the learning environment that may affect learning

<table>
<thead>
<tr>
<th>44% strongly agree</th>
<th>45% agree</th>
</tr>
</thead>
</table>

The site client observations indicate that supervisors are motivated by the AWARE mission and they want to do well for the people they help.

- Point out that they will continue to gain mastery after the training event by participating in peer reviews and with management support.
- Clearly explain the criteria being used to evaluate their performance.

**AWARE’s physical training space is adequate for learning.** The training room is big enough, has appropriate furniture, proper audio/visual equipment, and is free from distractions.

- 90% of learners report access to computers for online training.
- The site client reports that all supervisors have access to a computer suitable for computer delivered training.

Therefore, external and environmental factors should not be an obstacle to a successful training experience. We can anticipate a smooth experience in this regard.

### Transfer Context—Any factors related to the workplace that could facilitate or hinder application of learned skill on the job

| 89% of supervisors agree that their manager will support and value the time they take to conduct weekly supervision meetings on-the-job: |
|--------------------------|-----------------|-----------------|
| 78% strongly agree       | 11% agree        | 11% disagreed   |

89% of supervisors agree that they anticipate they will receive timely

- Integration
  - Managers will support supervisors by pairing up supervisors on a rotating basis each week after they have conducted supervision meetings with direct reports. This peer meeting will afford the following:
  - **Watch me**
    - After the training event, supervisors will have an opportunity to demonstrate their new knowledge by having their completed goal worksheet job aids reviewed by their fellow supervisors.

<table>
<thead>
<tr>
<th>Supervisor survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site client interview</td>
</tr>
<tr>
<td>Site client interview</td>
</tr>
<tr>
<td>Site client interview</td>
</tr>
<tr>
<td>Supervisor survey</td>
</tr>
<tr>
<td>Supervisor survey</td>
</tr>
<tr>
<td>Integration</td>
</tr>
</tbody>
</table>

Conducting Effective Supervision Meetings (Anderson, Snookes, Strasser)
coaching and feedback about how to apply their learning to the workplace:
• 22% strongly agree
• 56% agree
• 11% slightly agree
• 11% disagree

| Mode of Delivery |
|------------------|-----------------|

<table>
<thead>
<tr>
<th>Delivery Mode (select one or more)</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Instructor-led training</td>
<td>Our topics lend themselves well to live demonstration, role play, and peer discussion. Practice and role play will be fundamental for mastering supervision meetings. Development costs would be prohibitive for computer delivery and there is little need for the training to scale for a large audience. Therefore, in person group instruction will be simple and effective to administer and should be the most affordable to create.</td>
</tr>
</tbody>
</table>
Job-Focused Objectives

Critical Tasks that the Training Will Address

2.3.1. Assist direct reports that are reluctant to set goals.
   2.3.1.1. Determine whether or not the direct report is reluctant to set goals.
   2.3.1.2. Reassure direct reports that are reluctant to set goals.
2.3.2. Assist the direct report in writing 1-2 goals.
   2.3.2.1. Generate ideas
   2.3.2.2. Ask them to write 1-2 goals for the coming week.
2.3.3. Verify goals meet AWARE criteria.
   2.3.3.1. Ask them if their goal aligns with AWARE’s mission and values.
   2.3.3.2. Ask them if they can address the goal independently.
   2.3.3.3. Write down when they plan to carry out the action.
   2.3.3.4. Write down how they will know they’ve achieved the goal.
   2.3.3.5. Ask them if their goal is achievable before we meet again next week.

Job-Focused Instructional Objectives

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(2.3.1.) Assist direct reports that are reluctant to set goals.</td>
<td>Cues:</td>
<td>Supervisors will ask the direct report questions to determine their:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● The supervisor has finished discussing job duty wins and challenges.</td>
<td>○ Experience with using goal setting as a tool</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Resources</td>
<td>○ Attitude toward using goal setting as a tool</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● AWARE supervision meeting job aid</td>
<td>● Supervisors will employ suitable reassuring language according to the direct report’s stated reason for their reluctance.</td>
</tr>
</tbody>
</table>
| 2 | (2.3.2. - 2.3.3.) Assist the direct report in writing 1-2 goals. | **Cues**  
- The direct report is receptive to using goal setting as a tool to improve their workplace performance.  
**Resources**  
- AWARE supervision meeting job aid  
- AWARE goal worksheet job aid  
- A private office.  
- A computer with G suite (for checking schedule and planning). | **Ask questions to prompt goal ideas that:**  
- Are important to the direct report.  
- Are aligned with AWARE’s mission, vision, and values.  
- The direct report can own and address independently.  
**Goals meet the following criteria:**  
- The goal starts with an action word.  
- An action word is followed by the specifics of an object that will be acted upon.  
- No more than 2 goals per week.  
- Achievable within a week.  
- Specifies when the direct report plans to carry out the action.  
- Direct report can address the goal independently.  
- Aligns with AWARE’s mission, vision, and values.  
- Specifies how the direct report will know they’ve achieved the goal. |
## Performance Assessment Instrument

### Objectives

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(2.3.1.) Assist direct reports that are reluctant to set goals.</td>
<td>Cues&lt;br&gt;● The supervisor has finished discussing job duty wins and challenges.&lt;br&gt;Resources&lt;br&gt;● AWARE supervision meeting job aid&lt;br&gt;● A private office.</td>
<td>● Supervisors will ask the direct report questions to determine their:&lt;br&gt;○ Attitude toward using goal setting as a tool&lt;br&gt;● Supervisors will employ suitable reassuring language according to the direct report’s stated reason for their reluctance.</td>
</tr>
<tr>
<td>2</td>
<td>(2.3.2. - 2.3.3.) Assist the direct report in writing 1-2 goals.</td>
<td>Cues&lt;br&gt;● The direct report is receptive to using goal setting as a tool to improve their focus and direction.&lt;br&gt;Resources&lt;br&gt;● AWARE supervision meeting job aid&lt;br&gt;● AWARE goal worksheet job aid&lt;br&gt;● A private office.&lt;br&gt;● A computer with G suite (for checking schedule and planning).</td>
<td>Ask questions to prompt goal ideas that:&lt;br&gt;● Are important to the direct report.&lt;br&gt;● Are aligned with AWARE’s mission, vision, and values.&lt;br&gt;● The direct report can own and address independently. Goals meet the following criteria:&lt;br&gt;● The goal starts with an action word.&lt;br&gt;● An action word is followed by the specifics of an object that will be acted upon.&lt;br&gt;● No more than two goals.&lt;br&gt;● Achievable within a week.&lt;br&gt;● Write down when the direct report plans to carry out the action.&lt;br&gt;● Direct report can address the goal independently.&lt;br&gt;● Aligns with AWARE’s mission, vision, and values.&lt;br&gt;● Write down how the direct report will know they’ve achieved the goal.</td>
</tr>
</tbody>
</table>
## Type of Performance Assessment and Rationale

<table>
<thead>
<tr>
<th>Type of assessment</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product assessment</strong></td>
<td>Although the supervisors themselves are not creating the goals, the goals are a tangible end-product of this task and objective, thus providing a final product for assessment to ensure the task was completed accurately.</td>
</tr>
<tr>
<td><strong>Process assessment</strong></td>
<td>The expected performance of the supervisors is an intangible process involving coaching, guiding, and mentoring direct reports. It is for this reason that a process assessment be used to observe the learner’s performance while it is occurring.</td>
</tr>
</tbody>
</table>
Assessor Directions

The assessment will be conducted on-the-job with you shadowing the supervisor as they conduct a supervision meeting with one of their direct reports.

1. At completion of the training, inform all supervisors that they will be assessed. Also explain to supervisors:
   a. The assessment will help determine if the instruction was effective.
   b. Multiple spaced out practices, including assessments, will help you retain the skills you've learned.
2. Within 2 weeks of the completion of the training, arrange with the supervisor when you will join in on their supervision meeting.
3. You will need a blank AWARE Supervision Meeting Assessment instrument.
4. Before the meeting starts, explain to both the supervisor and the direct report that you are here:
   a. As part of the supervision meeting training
   b. To silently shadow the meeting
   c. To take notes
   d. To give the supervisor feedback when the meeting has finished.
5. To avoid meeting disruption, attend the whole supervision meeting, but you only need to assess goal setting using the assessment instrument.
6. After the meeting has finished and the direct report has left, if the supervisor passed the assessment, give the supervisor feedback using the Assessment Instrument. If they didn’t pass, follow remediation steps below.

Remediation

In the event that a supervisor does not pass the assessment:
1. Immediately after the assessment, conduct a debriefing.
2. Review a few of the areas of training that they successfully implemented.
3. Review the areas they fell below mastery level and explain their importance by relating them to direct report’s ability to independently take action and make decisions.
4. Provide insight into the areas that need improvement.
5. Arrange a time to shadow their next supervision meeting, and explain that you will use the same assessment tool to offer feedback and to determine mastery.
6. Suggest they make use of peer meetups and supervisor feedback.
7. If the supervisor falls below mastery threshold again, schedule them to attend the next Supervision Meeting Training event.
### AWARE Supervision Meeting Assessment

<table>
<thead>
<tr>
<th>Supervisor Name:</th>
<th>Date:</th>
</tr>
</thead>
</table>

## PART A: Process assessment

<table>
<thead>
<tr>
<th>Did the supervisor:</th>
<th>Meet the criteria?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> Ask questions to determine the direct report’s ATTITUDE TOWARD USING GOAL SETTING as a tool. For example:</td>
<td>□ Yes □ No</td>
<td></td>
</tr>
<tr>
<td>• How do you think goal setting is going?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Do you think goal setting is a USEFUL TOOL?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Do you think goal setting is EFFECTIVE?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Do you see goal setting as an EXTRA BURDEN?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Would you find setting goals OVERWHELMING?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Do you see goal setting as INDICATIVE OF FAILURE, that you’re not meeting expectations?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Are you concerned goal setting means you’ll be MICROMANAGED?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Are you concerned goal setting will result in REPRIMAND?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(objective 1)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**2** Employ suitable REASSURING LANGUAGE according to the direct report’s STATED REASON for their reluctance. For example:

- This isn’t about me telling you what your goals should be. It needs to be a goal you want to make.
- Goals should help you focus on what’s important to you and to AWARE. They should help you move forward and make progress.
- You only need to set one goal. This is an incremental weekly process.
- I want to help you make your goal small, manageable, and achievable.
- My objective is to help you succeed, not to give you a hard time or reprimand you.
- I want you to choose something you value and care about.
- I want this to be a win for everyone - you, me, our clients, and AWARE in general.

(objective 1)
|   | Ask questions to find out GOAL IDEAS that are IMPORTANT TO THE DIRECT REPORT. For example:  
|   | ● What is the most important thing about performing your job duties that you want to improve?  
|   | ● What barriers are preventing you performing your job duties?  
|   | ● What job duties are causing you the most pain?  
|   | (objective 2) |
|   | Prompt the direct report to consider if their ideas ALIGN WITH AWARE’s mission, vision, and values. For example:  
|   | ● Does your goal idea align with AWARE’s mission?  
|   | ● What do you think is causing AWARE the most pain?  
|   | ● What do you think will help AWARE achieve its mission?  
|   | (objective 2) |
|   | Prompt the direct report to identify goal ideas that they can OWN AND ADDRESS INDEPENDENTLY. For example:  
|   | ● How can you change your goal idea so it is something you can do independently?  
|   | ● Is this (goal idea) something you can own and address by yourself?  
|   | ● Which ideas can you own and address independently?  
|   | (objective 2) |
|   | Part A, Total Yeses (out of 5) |
**PART B: Product Assessment (Worksheet)**

<table>
<thead>
<tr>
<th>Does the goal setting worksheet:</th>
<th>Meet the criteria?</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include NO MORE THAN TWO GOALS. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Include goals that start with an ACTION WORD. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Include goals that have an action word followed by the specifics of an OBJECT THAT WILL BE ACTED UPON. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Have goals that the direct report is able to ADDRESS INDEPENDENTLY. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Have goals that ALIGN WITH AWARE’s mission, vision, and values. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Include goals that are ACHIEVABLE WITHIN A WEEK. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Include WHEN the direct report plans to carry out the action. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
<tr>
<td>Include HOW THE DIRECT REPORT WILL KNOW they’ve achieved the goal. (objective 2)</td>
<td>□ Yes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>□ No</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part B, Total Yeses (out of 8)</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Part A &amp; B Total (out of 13)</th>
<th>Mastery Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to achieve mastery, each supervisor must complete this assessment on-the-job once, achieving at least 11 yeses, or a total score of 85% or higher (see Appendix for note).</td>
<td></td>
</tr>
</tbody>
</table>
Instructional Plan Worksheet

<table>
<thead>
<tr>
<th>How long (in minutes) is the entire training program?</th>
<th>180 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many units will you include in the training program?</td>
<td>1 unit</td>
</tr>
</tbody>
</table>

Introduction to the training program

<table>
<thead>
<tr>
<th>Time</th>
<th>6 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td></td>
</tr>
<tr>
<td>● Lead the supervisors into the training event by showing the advance organizer vertically cut in half, then have them guess what’s on the other half with a partner.</td>
<td></td>
</tr>
<tr>
<td>● Explain that:</td>
<td></td>
</tr>
<tr>
<td>○ The reason for attendance is to improve direct report’s ability to independently make decisions and take action, and to decrease the time AWARE leadership spends on tasks beyond their job role.</td>
<td></td>
</tr>
<tr>
<td>○ This is important because AWARE’s goal is for their service model to be effective in both reducing systemic oppression and the physical danger of individual victims of domestic violence. Strengthening direct reports, strengthens AWARE.</td>
<td></td>
</tr>
<tr>
<td>○ Explain (to supervisors) this training is relevant to you because:</td>
<td></td>
</tr>
<tr>
<td>■ Many of you have experience assisting people set goals. This will build on that skill to make you even better at empowering people with direction and focus.</td>
<td></td>
</tr>
<tr>
<td>■ As you help your direct reports focus and direct their efforts, they will not need to rely on you as much.</td>
<td></td>
</tr>
<tr>
<td>■ You will have more time to devote your skills and capability to making AWARE more effective and impactful.</td>
<td></td>
</tr>
<tr>
<td>● Using the advance organizer, tell the supervisors what will be covered in the training. The advance organizer will show how goal setting fits into the meeting as a whole and it will show the relationship between:</td>
<td></td>
</tr>
<tr>
<td>○ determining reluctance</td>
<td></td>
</tr>
<tr>
<td>○ reassuring direct reports</td>
<td></td>
</tr>
<tr>
<td>○ generating ideas</td>
<td></td>
</tr>
<tr>
<td>○ assisting in writing a goal</td>
<td></td>
</tr>
<tr>
<td>○ verifying goal criteria</td>
<td></td>
</tr>
</tbody>
</table>
## Unit 1: Your Direct Report’s Goal

### Objectives

<table>
<thead>
<tr>
<th>#</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
</table>
| 1  | Assist direct reports that are reluctant to set goals.                       | Cues                                                                                 | ● Supervisors will ask the direct report questions to determine their:  
  ○ Attitude toward using goal setting as a tool  
  ● Supervisors will employ suitable reassuring language according to the direct report’s stated reason for their reluctance.                                    |
|    |                                                                             | Resources                                                                             |                                                                                              |
|    |                                                                             | ● AWARE supervision meeting job aid                                                   |                                                                                              |
|    |                                                                             | ● A private office.                                                                   |                                                                                              |
|    |                                                                             | Ask questions to prompt goal ideas that:                                              |                                                                                              |
|    |                                                                             | ● Are important to the direct report.                                                 |                                                                                              |
|    |                                                                             | ● Are aligned with AWARE’s mission, vision, and values.                               |                                                                                              |
|    |                                                                             | ● The direct report can own and address independently.                                |                                                                                              |
|    |                                                                             | Goals meet the following criteria:                                                   |                                                                                              |
|    |                                                                             | ● The goal starts with an action word.                                                |                                                                                              |
|    |                                                                             | ● An action word is followed by the specifics of an object that will be acted upon.   |                                                                                              |
|    |                                                                             | ● No more than 2 goals per week.                                                      |                                                                                              |
|    |                                                                             | ● Achievable within a week.                                                           |                                                                                              |
|    |                                                                             | ● Specifies when the direct report plans to carry out the action.                     |                                                                                              |
|    |                                                                             | ● Direct report can address the goal independently.                                  |                                                                                              |
|    |                                                                             | ● Aligns with AWARE’s mission, vision, and values.                                   |                                                                                              |
|    |                                                                             | ● Specifies how the direct report will know they’ve achieved the goal.               |                                                                                              |
|    |                                                                             | Resources                                                                             |                                                                                              |
|    |                                                                             | ● AWARE supervision meeting job aid                                                   |                                                                                              |
|    |                                                                             | ● AWARE goal worksheet job aid                                                        |                                                                                              |
|    |                                                                             | ● A private office.                                                                   |                                                                                              |
|    |                                                                             | ● A computer with G suite (for checking schedule and planning).                      |                                                                                              |
| 2  | Assist the direct report in writing 1-2 goals.                               | Cues                                                                                 |                                                                                              |
|    |                                                                             | Resources                                                                             |                                                                                              |
|    |                                                                             | ● AWARE supervision meeting job aid                                                   |                                                                                              |
|    |                                                                             | ● AWARE goal worksheet job aid                                                        |                                                                                              |
|    |                                                                             | ● A private office.                                                                   |                                                                                              |
|    |                                                                             | ● A computer with G suite (for checking schedule and planning).                      |                                                                                              |
Plan

<table>
<thead>
<tr>
<th>Phase: Activation</th>
<th>Minutes: 9</th>
<th>(Subtotal: 15)</th>
</tr>
</thead>
</table>
| • Previous Experience. In pairs, have supervisors discuss:  
  ○ One reason why direct reports might be reluctant to set goals with their supervisor and what could be said to reassure their reluctance.  
  ○ A specific instance where they assisted a direct report in setting goals and the method they followed.  
|                     |            |                  |
| • New Experience. Explain to the supervisors that they can use their knowledge about goal setting and integrate it with creating specific goals that improve a direct report’s ability to independently make decisions and take action.  
| • Structure. Share an expository advance organizer that:  
  ○ Uses two side-by-side lists of single words to express reasons for reluctance and countering reassurances.  
  ○ Shows the main components of how to assist setting a goal.  |

<table>
<thead>
<tr>
<th>Phase: Demonstration</th>
<th>Minutes: 35</th>
<th>(Subtotal: 50)</th>
</tr>
</thead>
</table>
| The instructor will play the role of a supervisor assisting a direct report. A volunteer learner will use a role description card to play the role of a direct report for each demonstration. The AWARE Supervision Meeting Job Aid will be displayed near to the demonstrators so that supervisors can follow along and see how the job aid is being used by the demonstrator.  
Demonstration 1: The direct report’s role play is straightforward with no troubleshooting needed.  
  ○ The direct report has a positive attitude toward goal setting.  
  ○ The instructor draws attention to the job aid and worksheet, indicating and calling out each main step.  
|                     |            |                  |
| Demonstration 2: The direct report feels that setting goals is overwhelming and wants a supervisor’s help in resolving conflict.  
  ○ The instructor reassures the direct report, then calling out, draws attention to the job aid text that shows common reasons for reluctance in one column with accompanying reassuring language in the adjacent column.  
  ○ When prompting goal ideas, the instructor uses the job aid to spotlight the need for the direct report to have a goal they can own and address independently, as well as suggested language they can use.  
|                     |            |                  |
| Debrief 1. After the first two demonstrations, in pairs, have supervisors compare them:  
  ○ What were the two main differences between the first two demonstrations?  
  ○ What did the instructor do in the second demonstration to address reluctance and to ensure the goal was something the direct report could own independently?  
| The instructor spotlights how the job aid was used to accomplish this.  
Demonstration 3: The direct report doesn’t like how formal the goal setting process is, they want to plan a resume writing class for residents next month with logistical help from their  |
supervisor, and they don’t see why they need to be specific about when they’ll carry out the action. The instructor asks supervisors to use the job aid to follow along and to pay particular attention to:

- Why the direct report is reluctant and the corresponding reassuring language.
- Whether or not the direct report’s goal was something they can own independently and how was the job aid followed.
- What other goal setting criteria was problematic?

**Debrief 2.** After the demonstrations, in pairs, have supervisors discuss all three demonstrations:

- What were the different reasons for reluctance and what corresponding reassurances were used?
- What did the instructor do in each demonstration to ensure the goal was something the direct report could own independently?
- What did the instructor do to ensure the goal met all goal setting criteria?

The instructor spotlights how the job aid was used to accomplish all of these.

**Phase: Application**

<table>
<thead>
<tr>
<th>Minutes: 105</th>
<th>(Subtotal: 155)</th>
</tr>
</thead>
</table>

Number of practices: 4
Number of assessments: 1

Learners will pair up to role play as supervisors or direct reports. Each practice will allow for switching roles so that each learner plays the role of supervisor.

**Practice 1:** In the role play, the following criteria will be problematic.

- Reluctance
- Independently own
- When
- Measurement

Direct reports are forthcoming about their goals. The instructor:

- Reminds supervisors to review the job aid, pointing out corresponding reassuring language to common reasons for reluctance and language suggestions for direct report ownership of goals.
- States each step, before asking learner supervisors to complete it.
- Listens in on practicing pairs and provides immediate error detection and correction at each step when supervisors attempt to employ relevant reassuring language and set a goal.
  - Points out the specific reassuring language in the job aid that corresponds with the specific reluctance expressed in the role scenario.
  - Points out specific language in the job aid to use to direct the direct report toward a goal they can own and address independently.
  - Uses the job aid to point out and suggest how to meet goal measurement criterion and how precisely to specify when the direct report will carry out the goal action.
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

**Practice 2:** In the role play, the following criteria will be problematic.
The instructor:
- Reminds supervisors to review the job aid, pointing out corresponding reassuring language to common reasons for reluctance and language suggestions for direct report ownership of goals.
- Listens in on practicing pairs and provides immediate error detection and correction at each step when supervisors attempt to employ relevant reassuring language and set a goal.
  - Prompts supervisors to use their job aid to independently find specific reassuring language in the job aid that corresponds with the specific reluctance expressed in the role scenario.
  - Prompts supervisors to use their job aid to independently find specific language to use to direct the direct report toward a goal they can own and address independently.
  - Prompts supervisors to use their job aid to find suggestions on how to meet goal measurement criterion and how precisely to specify when the direct report will carry out the goal action.
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

Practice 3: The instructor and an additional facilitator play the roles of more difficult direct reports. Supervisors practice two at a time. Those not practicing will watch and be asked to provide something they did well, and a suggestion for improvement. In the role play, the following criteria will be problematic.

- Reminds the supervisors to review their job aid
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

*Practice 4: Conducted on-the-job with a real direct report within one week. The client will shadow the whole supervision meeting. The client:
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

*Assessment 1: Conducted on-the-job with a real direct report within two weeks. The client will shadow the whole supervision meeting. The client:
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.
## Coaching Strategy

<table>
<thead>
<tr>
<th>Practices</th>
<th>Assessments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
</tr>
</tbody>
</table>

### Before the Role Play Begins
- Remind learners to review the job aid.
- Remind learners about what is critical, difficult, and complex.
  - Reasons for reluctance with corresponding reassurance.
  - Generating goal ideas the direct report can own independently.

### During the Role Play
- Provide coaching (immediate error detection and correction) for what is critical, difficult, and complex.
  - Practice 1: pointing out, showing, telling relevant job aid information.
  - Practice 2: prompting independent searching of relevant job aid information.
- State each step in the job aid before asking learners to complete it.

### After the Role Play
- Use the performance assessment to provide delayed feedback.

*Not included in the time plan for the application phase.

### Phase: Integration

<table>
<thead>
<tr>
<th>Minutes: 15</th>
</tr>
</thead>
</table>

### Watch Me.
- Practice 4 and Assessment 1 will provide supervisors an opportunity to demonstrate their skill to their supervisor on the job.
- A few weeks after the assessments have finished, the client will attend supervision meetings to shadow and give on-the-job feedback using the assessment checklist. Additionally, the client will ask if there are any other barriers to skill transfer that are emerging. This will not be to determine mastery.

### Reflect.
- Give supervisors a guided reflection worksheet with prompts that include:
  - Considering their first supervision meeting and what they want to be sure they do in that meeting.
  - Linking goal setting to improving direct report’s ability to independently make decisions and to increasing the time and focus AWARE leadership can spend on their value producing roles.

### Create.
- Supervisors are asked to think about specific direct reports on their team and to discuss in small groups how they can apply what they’ve learned about assisting their specific direct reports in setting valued goals applicable to them and their individual needs.
- Invite supervisors to set up peer meetups or informal meetings with their senior supervisor after the training event. Advise supervisors to use these meetings to talk about, firstly, how they are making these new skills their own, and secondly, to give and receive feedback.

*Not included in the time plan for the integration phase.*
## Conclusion to the training program

<table>
<thead>
<tr>
<th>Time</th>
<th>10 minutes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>The instructor uses the expository advance organizer to recap what was learned and emphasizes how this all ties back to increasing all direct reports' ability to independently make decisions, which benefits them and AWARE as they are able to focus more on their value-producing job roles. The instructor tells supervisors that <em>their</em> supervisor will schedule an observation of their supervision meeting within one week and an assessment within two weeks.</td>
</tr>
</tbody>
</table>
Detailed Instructional Plan

Course Information

<table>
<thead>
<tr>
<th>Performance Gap(s)</th>
<th>Strategic Business Objective(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What we want our AWARE supervisors to do is hold supervision meetings with direct reports that result in: supervisors reporting a mean response above 5.1 (out of 6) for their direct reports’ ability to independently make decisions and take action, and upper-management reporting an average of 10% of their time spent on tasks beyond their job role.</td>
<td>One of AWARE’s most important goals is for their service model to be effective in both reducing systemic oppression and the physical danger of individual victims of domestic violence. In order to achieve this goal, AWARE’s leadership have identified a strategic organizational objective:</td>
</tr>
<tr>
<td>What our AWARE supervisors are doing now is holding supervision meetings with direct reports that result in: supervisors reporting a mean response of 4.1 (out of 6) for their direct reports’ ability to independently make decisions and take action, and upper-management reporting an average of 30% of their time spent on tasks beyond their job role.</td>
<td>★ <em>Increasing time and focus on value-producing goals.</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mode of Delivery</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗  Instructor-led training.</td>
<td>Our topics lend themselves well to live demonstration, role play, and peer discussion. Practice and role play will be fundamental for mastering supervision meetings. Development costs would be prohibitive for computer delivery and there is little need for the training to scale for a large audience. Therefore, in person group instruction will be simple and effective to administer and should be the most affordable to create.</td>
</tr>
<tr>
<td>✗  Traditional classroom</td>
<td></td>
</tr>
<tr>
<td>❑  Virtual classroom</td>
<td></td>
</tr>
<tr>
<td>❑  Self-paced training. Can include:</td>
<td></td>
</tr>
<tr>
<td>❑  Print-based workbooks</td>
<td></td>
</tr>
<tr>
<td>❑  Online/eLearning that learners complete individually</td>
<td></td>
</tr>
<tr>
<td>❑  Structured on-the-job training</td>
<td></td>
</tr>
<tr>
<td>❑  Flipped classroom</td>
<td></td>
</tr>
</tbody>
</table>
## Sequence and Division of Objectives

<table>
<thead>
<tr>
<th>Objective No. /Unit No.</th>
<th>Performance</th>
<th>Conditions on the job</th>
<th>Criteria on the job</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective 1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Unit 1                 | Assist direct reports that are reluctant to set goals. | **Cues**
  ● The supervisor has finished discussing job duty wins and challenges. |
  ● Supervisors will ask the direct report questions to determine their attitude toward using goal setting as a tool.  
  ● Supervisors will employ suitable reassuring language according to the direct report's stated reason for their reluctance. |
|                        |             | **Resources**
  ● AWARE supervision meeting job aid |
  ● A private office. |
| Objective 2            |             |                       |                      |
| Unit 1                 | Assist the direct report in writing 1-2 goals. | **Cues**
  ● The direct report is receptive to using goal setting as a tool to improve their focus and direction. |
  Ask questions to prompt goal ideas that:
  ● Are important to the direct report.  
  ● Are aligned with AWARE's mission, vision, and values.  
  ● The direct report can own and address independently.  
  Goals meet the following criteria:
  ● The goal starts with an action word.  
  ● An action word is followed by the specifics of an object that will be acted upon.  
  ● No more than 2 goals per week.  
  ● Achievable within a week.  
  ● Specifies when the direct report plans to carry out the action.  
  ● Direct report can address the goal independently.  
  ● Aligns with AWARE's mission, vision, and values.  
  ● Specifies how the direct report will know they've achieved the goal. |
  **Resources**
  ● AWARE supervision meeting job aid |
  ● AWARE goal worksheet job aid |
  ● A private office. |
  ● A computer with G suite (for checking schedule and planning). |
## Introduction

<table>
<thead>
<tr>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Est. Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Element: Introduction</strong></td>
<td></td>
<td>6 Mins.</td>
</tr>
<tr>
<td>● Lead the supervisors into the training event by showing the advance organizer vertically cut in half, then have them guess what’s on the other half with a partner.</td>
<td>● Classroom</td>
<td></td>
</tr>
<tr>
<td>● Explain that:</td>
<td>● Chairs</td>
<td></td>
</tr>
<tr>
<td>○ The reason for attendance is to improve direct report’s ability to independently make decisions and take action, and to decrease the time AWARE leadership spends on tasks beyond their job role.</td>
<td>● Projector/ screen</td>
<td></td>
</tr>
<tr>
<td>○ This is important because AWARE’s goal is for their service model to be effective in both reducing systemic oppression and the physical danger of individual victims of domestic violence. Strengthening direct reports, strengthens AWARE.</td>
<td>● Computer</td>
<td></td>
</tr>
<tr>
<td>○ Explain (to supervisors); this training is relevant to you because:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ Many of you have experience assisting people in setting goals. This will build on that skill to make you even better at empowering people with direction and focus.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ As you help your direct reports focus and direct their efforts, they will not need to rely on you as much.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ You will have more time to devote your skills and capability to making AWARE more effective and impactful.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Using the advance organizer, tell the supervisors what will be covered in the training. The advance organizer will show how goal setting fits into the meeting as a whole and it will show the relationship between:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Determining reluctance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Reassuring direct reports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Generating ideas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Assisting in writing a goal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Verifying goal criteria</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Unit 1: Your Direct Report’s Goal

<table>
<thead>
<tr>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Est. Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Course Element: Activation</strong></td>
<td>● Classroom</td>
<td>9 Mins</td>
</tr>
<tr>
<td>● <em>Previous Experience</em>. In pairs, have supervisors discuss:</td>
<td>● Chairs</td>
<td></td>
</tr>
<tr>
<td>○ One reason why direct reports might be reluctant to set goals with their supervisor and what could be said to reassure their reluctance.</td>
<td>● Projector/ screen</td>
<td></td>
</tr>
<tr>
<td>○ A specific instance where they assisted a direct report in setting goals and the method they followed.</td>
<td>● Computer</td>
<td></td>
</tr>
<tr>
<td>● <em>New Experience</em>. Explain to the supervisors that they can use their knowledge about goal setting and integrate it with creating specific goals that improve a direct report’s ability to independently make decisions and take action.</td>
<td>Soft Copy:</td>
<td></td>
</tr>
<tr>
<td>● <em>Structure</em>. Share an expository advance organizer that:</td>
<td>● Advance organizer 2</td>
<td></td>
</tr>
<tr>
<td>○ Uses two side-by-side lists of single words to express reasons for reluctance and countering reassurances.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Shows the main components of how to assist setting a goal.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Course Element: Demonstration

The instructor will play the role of a supervisor assisting a direct report. A volunteer learner will use Demonstration Role Descriptions to play the role of a direct report for each demonstration. The AWARE Supervision Meeting Job Aid will be displayed near to the demonstrators so that supervisors can follow along and see how the job aid is being used by the demonstrator.

Demonstration 1:

- Reluctance
- Independent Ownership
- Time-bound
- Measurable

The direct report's role play is straightforward with no troubleshooting needed.
- The direct report has a positive attitude toward goal setting.
- The instructor draws attention to the job aid and worksheet, indicating and calling out each main step.

Demonstration 2:

- Reluctance
- Independent Ownership
- Time-bound
- Measurable

The direct report feels that setting goals is overwhelming and wants a supervisor's help in resolving conflict.
- The instructor reassures the direct report, then calling out, draws attention to the job aid text that shows common reasons for reluctance in one column with accompanying reassuring language in the adjacent column.
- When prompting goal ideas, the instructor uses the job aid to spotlight the need for the direct report to have a goal they can own and address independently, as well as suggested language they can use.

Debrief 1. After the first two demonstrations, in pairs, have supervisors compare them:
- What were the two main differences between the first two demonstrations?
- What did the instructor do in the second demonstration to address reluctance and to ensure the goal was something the direct report could own independently?

The instructor spotlights how the job aid was used to accomplish this.

<table>
<thead>
<tr>
<th>Course Element: Demonstration</th>
<th></th>
<th>30 Mins</th>
</tr>
</thead>
<tbody>
<tr>
<td>The instructor will play the role of a supervisor assisting a direct report. A volunteer learner will use Demonstration Role Descriptions to play the role of a direct report for each demonstration. The AWARE Supervision Meeting Job Aid will be displayed near to the demonstrators so that supervisors can follow along and see how the job aid is being used by the demonstrator.</td>
<td>Classroom</td>
<td>Chairs</td>
</tr>
<tr>
<td>Demonstration 1:</td>
<td>Projector/ screen</td>
<td>Computer</td>
</tr>
<tr>
<td>- Reluctance</td>
<td>Hard &amp; Soft Copies:</td>
<td>Classroom</td>
</tr>
<tr>
<td>- Independent Ownership</td>
<td>- Job aids</td>
<td>Chairs</td>
</tr>
<tr>
<td>- Time-bound</td>
<td>- Goal Setting Worksheets</td>
<td>Projector/ screen</td>
</tr>
<tr>
<td>- Measurable</td>
<td>Hard Copies:</td>
<td>Computer</td>
</tr>
<tr>
<td>The direct report's role play is straightforward with no troubleshooting needed.</td>
<td>Demo Role Description 1</td>
<td></td>
</tr>
<tr>
<td>- The direct report has a positive attitude toward goal setting.</td>
<td>Demo Role Description 2</td>
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<tr>
<td>- The instructor draws attention to the job aid and worksheet, indicating and calling out each main step.</td>
<td>Demo Role Description 3</td>
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<tr>
<td>Demonstration 2:</td>
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<td></td>
</tr>
</tbody>
</table>
Demonstration 3:

☑ Reluctance   ☑ Time-bound
☑ Independent Ownership   ☐ Measurable

The direct report doesn't like how formal the goal setting process is, they want to plan a resume writing class for residents with logistical help from their supervisor, and they don’t see why they need to be specific about when they'll carry out the action. The instructor asks supervisors to use the job aid to follow along and to pay particular attention to:

- Why the direct report is reluctant and the corresponding reassuring language.
- Whether or not the direct report's goal was something they can own independently and how was the job aid followed.
- What other goal setting criteria was problematic?

Debrief 2. After the demonstrations, in pairs, have supervisors discuss all three demonstrations:

- What were the different reasons for reluctance and what corresponding reassurances were used?
- What did the instructor do in each demonstration to ensure the goal was something the direct report could own independently?
- What did the instructor do to ensure the goal met all goal setting criteria?

The instructor spotlights how the job aid was used to accomplish all of these.
## Course Element: Application

<table>
<thead>
<tr>
<th>Number of practices:</th>
<th>4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of assessments:</td>
<td>1</td>
</tr>
</tbody>
</table>

Learners will pair up to role play as supervisors or direct reports. Each practice will allow for switching roles so that each learner plays the role of supervisor.

**Practice 1:** In the role play (Role Description 1a & 1b), the following criteria will be problematic:

- ☐ Reluctance
- ☐ Independent Ownership
- ☐ Time-bound
- ☐ Measurable

Direct reports are forthcoming about their goals. The instructor:

- Reminds supervisors to review the job aid, pointing out corresponding reassuring language to common reasons for reluctance and language suggestions for direct report ownership of goals.
- States each step, before asking learner supervisors to complete it.
- Listens in on practicing pairs and provides immediate error detection and correction at each step when supervisors attempt to employ relevant reassuring language and set a goal.
  - Points out the specific reassuring language in the job aid that corresponds with the specific reluctance expressed in the role scenario.
  - Points out specific language in the job aid to use to direct the direct report toward a goal they can own and address independently.
  - Uses the job aid to point out and suggest how to meet goal measurement criterion and how precisely to specify when the direct report will carry out the goal action.
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

**Practice 2:** In the role play, the following criteria will be problematic:

- ☑ Reluctance
- ☐ Independent Ownership
- ☐ Time-bound
- ☐ Measurable

The instructor:

- Reminds supervisors to review the job aid, pointing out corresponding reassuring language to common reasons for reluctance and language suggestions for direct report ownership of goals.
- Listens in on practicing pairs and provides immediate error detection and correction at each step.

**Additional Resources:**

- Classroom
- Chairs
- Projector/ screen
- Computer
- Hard & Soft Copies:
  - Job aids
  - Goal Setting Worksheets
  - Assessment Instruments
- Hard Copies:
  - Role Description 1a
  - Role Description 1b
  - Role Description 2a
  - Role Description 2b
  - Role Description 3a
  - Role Description 3b

**Classroom Items:**

- Classroom
- Chairs
- Projector/ screen
- Computer
when supervisors attempt to employ relevant reassuring language and set a goal.
○ Prompts supervisors to use their job aid to independently find specific reassuring language in the job aid that corresponds with the specific reluctance expressed in the role scenario.
○ Prompts supervisors to use their job aid to independently find specific language to use to direct the direct report toward a goal they can own and address independently.
○ Prompts supervisors to use their job aid to find suggestions on how to meet goal measurement criterion and how precisely to specify when the direct report will carry out the goal action.
● Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

**Practice 3:** The instructor and an additional facilitator play the roles of more difficult direct reports. Supervisors practice two at a time. Those not practicing will watch and be asked to provide something they did well, and a suggestion for improvement. In the role play, the following criteria will be problematic.

- ☑ Reluctance
- ☑ Time-bound
- ☑ Independent Ownership
- ☑ Measurable

The instructor:
- Reminds the supervisors to review their job aid
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

**Practice 4:** Conducted on-the-job with a real direct report within one week. The client will shadow the whole supervision meeting. The client:
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

**Assessment 1:** Conducted on-the-job with a real direct report within two weeks. The client will shadow the whole supervision meeting. The client:
- Provides delayed feedback using the assessment items from the AWARE Supervision Meeting Assessment.

*Not included in the time plan for the application phase.*
### Course Element: Integration

- **Reflect.** Give supervisors a guided reflection worksheet with prompts that include:
  - Considering their first supervision meeting and what they want to be sure they do in that meeting.
  - Linking goal setting to improving direct report’s ability to independently make decisions and to increasing the time and focus AWARE leadership can spend on their value producing roles.

- **Create.**
  - Supervisors are asked to think about specific direct reports on their team and to discuss in small groups how they can apply what they’ve learned about assisting their specific direct reports in setting valued goals applicable to them and their individual needs.
  - Invite and encourage supervisors to set up peer meetups or informal meetings with their senior supervisor after the training event. Advise supervisors to use these meetings to talk about, firstly, how they are making these new skills their own, and secondly, to give and receive feedback.

- **Watch Me.**
  - *Practice 4 and Assessment 1 will provide supervisors an opportunity to demonstrate their skill to their supervisor on the job.
  - *A few weeks after the assessments have finished, the client will attend supervision meetings to shadow and give on-the-job feedback using the assessment checklist. Additionally, the client will ask if there are any other barriers to skill transfer that are emerging. This will not be to determine mastery, but instead to optimize transfer.

*Not included in the time plan for the integration phase.*
Coaching Table

<table>
<thead>
<tr>
<th>Coaching Strategy</th>
<th>Practice</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Before the Role Play Begins</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Remind learners to review the job aid.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remind learners about what is critical, difficult, and complex.</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>• Reasons for reluctance with corresponding reassurance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Generating goal ideas the direct report can own independently.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>During the Role Play</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Provide coaching (immediate error detection and correction) for what is critical,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>difficult, and complex.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Practice 1: pointing out, showing, telling relevant job aid information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Practice 2: prompting independent searching of relevant job aid information.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State each step in the job aid before asking learners to complete it.</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>After the Role Play</strong></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Use the performance assessment to provide delayed feedback.</td>
<td>✓</td>
<td>✓</td>
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Summary

<table>
<thead>
<tr>
<th>Description / Explanation</th>
<th>Resources</th>
<th>Est. Time</th>
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<tbody>
<tr>
<td><strong>Course Element: Summary</strong></td>
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<tr>
<td>The instructor uses the expository advance organizer to recap what was learned and</td>
<td>Advance</td>
<td></td>
</tr>
<tr>
<td>emphasizes how this all ties back to increasing all direct reports’ ability to</td>
<td>Organizer</td>
<td></td>
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<tr>
<td>independently make decisions, which benefits them and AWARE as they are able to focus</td>
<td></td>
<td></td>
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<tr>
<td>more on their value-producing job roles. The instructor tells supervisors that their</td>
<td></td>
<td></td>
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<tr>
<td>supervisor will schedule an observation of their supervision meeting within one week</td>
<td></td>
<td></td>
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<tr>
<td>and an assessment within two weeks.</td>
<td></td>
<td></td>
</tr>
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</table>

Total course estimated time = 180 minutes
Team Project Status Reviews

Team Project Status Review 1

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>AWARE</th>
<th>Date:</th>
<th>9/11/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Author:</td>
<td>Joel Strasser</td>
<td>Project Team Members:</td>
<td>James Snookes, Jessica Stratton, Joel Strasser, Valen Anderson</td>
</tr>
</tbody>
</table>

Overall Project Status in Relation to Schedule

Project Status Summary:  _x_ Green  ____Yellow  ____Red
Indicate the extent to which the team believes the ID project is producing quality work on schedule.

What parts of the project has the team completed?
We’ve agreed on helpful tools to organize our project work and to work on individual parts on the project, including Asana, Google Docs, and Google Hangouts. We had an initial team meeting and spent time getting to know each other to get a feel of how we’ll work together. We reviewed the pertinent information from the class meeting. We set a recurring time for weekly group meetings and scheduled our first wellness check with Steve. We divided up and discussed our first week team deliverables including our project description, team charter, and first project status review. All scheduling from the project description have been organized with tasks assigned and deadlines set in our project management tool, Asana.

What parts of the project are in progress?
We are working on the project description, the team charter, and the project status review. These will be completed by Friday 9/14 to ensure submission 24 hours prior to our wellness check with Steve. Instruments for gathering data from both the site client and job incumbents are also in progress as the performance analysis and all other future deliverables are dependent on this data.

What parts of the project will the team work on next?
The next main task is to begin triangulating data from the client to conduct our performance analysis. Over the next few weeks and months we’ll work through the following items. We’ll complete our performance analysis. We’ll attend additional class meetings. We’ll complete our task analysis. We’ll continue to complete project status reviews. We’ll complete our learner
We'll complete our objectives. We'll complete a performance assessment instrument. We'll write instructional plan worksheets. We'll finalize our instructional plan. We'll complete an ID review. All these tasks are outlined in our upcoming due tasks within the Asana program we’re using.

Actual or Potential Roadblocks

What obstacles has the team run into so far and how did you work through or around them?
Initially the team came up with some agreed upon methods of communicating and working efficiently together. We quickly agreed upon the use of Asana and Google Docs. We were able to meet on Monday, our first full day working together to get organized and get a lot of the initial planning out of the way. When a teammate was having difficulty using Asana, they communicated this with the team. The team made a quick five minute Camtasia screencast shared on YouTube to demonstrate some of the main Asana features the team is using for our project.

What potential obstacles do you see related to what you will be working on next?
Creating the client interview instrument and the job incumbents survey in time to visit the client and allow the supervisors time to complete a survey is a large potential obstacle. Jessica, the deliverable lead for the performance analysis may find it challenging to process the data, analyse the data, and write a detailed performance analysis in time for the pass 1 deadline (9/22). This may also be an issue with workload balance due to what is involved in creating interview and survey instruments, data gathering, and conducting our analysis. Since our project author (James) will have a heavy workload with client interviews and site visits, the other team members have agreed to work on the data analysis and composition. Based on the early successes we’ve had working as a team it is anticipated that we will be able to address these and other obstacles in a successful manner.

What, if any, help will you need to overcome the obstacle(s)?
Regular meetings with our instructor to ask for guidance and feedback and to make sure we are on track. Checking in with team members to ensure a balanced workload.

Teamwork Successes

What aspects of working as a team have gone well?

- Communication methods: Google Hangouts, Asana, and Google Docs.
- Positivity amongst team members.
- Team members using their strengths to contribute effectively to the group.
What will the team do to build on those successes as the project continues?

- Keep momentum in the weekly meetings.
- Continue to utilize Asana for project management and process improvement.
- Remain open to suggestions from team members, instructor, and client.

Teamwork Improvements

What aspects of managing partnerships and collaborative relationships with project stakeholders could the team improve upon?

- Currently, there is no process or plan in place for managing the relationship with the site client. This includes clueing the site client in on our ID process, scheduling time for interviews, surveys, deliverable reviews, and regular meetings with the team. This will be added to our next team meeting agenda for discussion and prioritization.

What aspects of managing partnerships and collaborative relationships among its members could the team improve upon?

- Balancing personal and professional schedules (since we all have different obligations, schedules, etc.).
- Continuing to learn each other’s strengths and use them for maximum benefit.

How might the team better plan and manage its instructional design project?

- Regularly evaluating what has gone well and what areas need improvement during weekly team meetings. This is a standard item on every meeting agenda to guarantee opportunities for better planning and project management.
- There is an assumption all team members are comfortable with key features of both Asana and Google Docs. For Asana, using My Tasks to ensure no subtasks assigned to them are missed, and using Inbox to ensure no communications are missed. For Google Docs, using Commenting and using the Suggesting function with its accompanying accept/reject function.

What steps will the team take to improve these aspects? What, if any, help will you need?

- When opportunities are identified and changes are adopted, remain open to continued improvement.
- Individual team members agree to speak up if they see a need for a change.
- In our next team meeting, discuss key features of Asana and Google Docs to ensure all team members are aligned.
Team Project Status Review 2

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>AWARE</th>
<th>Date:</th>
<th>9/28/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Author:</td>
<td>Joel Strasser</td>
<td>Project Team Members:</td>
<td>James Snookes, Jessica Stratton, Joel Strasser, Valen Anderson</td>
</tr>
</tbody>
</table>

Overall Project Status in Relation to Schedule

Project Status Summary:  _x__Green   _x__Yellow   ____Red

Our status is somewhere between green and yellow. Toward yellow because internal deadlines have been missed 2 weeks in a row. Although we were able to navigate it (by other team members carrying extra weight and changing the deadline last minute), it’s definitely an issue since it happened again this week with our Task Analysis. Green because we have been able to figure out a way to work together and get the work done without missing any of the project deadlines.

What parts of the project has the team completed?

- We’ve agreed on helpful tools to organize our project work and to work on individual parts on the project, including Asana, Google Docs, and Google Hangouts.
- All of our remaining scheduled tasks from the project description have been organized with tasks assigned and deadlines set in our project management tool, Asana.
- We’ve reviewed pertinent information from our instructor led class meetings.
- We set a recurring time for weekly group meetings and held productive meetings thus far.
- We’ve had our first wellness check with Steve with a team representative who has shared the notes with the team. We’ve assigned team representatives for the remaining wellness checks.
- We’ve turned in our first team deliverables including our project description pass #1 and #2, team charter, team project status review #1, and performance analysis pass #1.
- In preparation for the remaining project deliverables, James has interviewed our client in person and tried to gather all needed data in one pass. He ran out of time for some client management items; however, he was able to address those items with the client this week.
- James also met with the SME this week for the task analysis; although, this will need further input from the SME.
- Pass 1 of the task analysis was completed this week.
What parts of the project are in progress?
We are currently working on our performance analysis pass #2 and we are in the early stages of working on the participant survey. As with every deliverable and data gathering instrument, we have internal deadlines set for initial drafts of these to be complete in order to give the entire team the opportunity to review and contribute to each task.

As our work is in progress, conversations between team members are constantly ongoing through the chatting tools available in Asana and the commenting features in Google Docs. This communication assists us in making our work run smoothly and efficiently.

What parts of the project will the team work on next?
Over the next few weeks and months we’ll work through the following items.

- We’ll attend additional class meetings, team meetings, and wellness checks.
- We’ll complete the second pass of our task analysis.
- We’ll complete our learner analysis.
- We’ll complete our objectives.
- We’ll complete a performance assessment instrument.
- We’ll complete the instructional plan worksheet.
- We’ll finalize our instructional plan.
- We’ll complete an ID review.

All these tasks are outlined in our upcoming due tasks within Asana.

Actual or Potential Roadblocks

What obstacles has the team run into so far and how did you work through or around them?
We’ve remained fluid and adjusted to team and individual circumstances that have arisen. Our internal deadlines have been pushed out on occasion as we focus on team contributions. As a result of us scanning through upcoming handouts and other materials, thankfully we haven’t missed any deliverable deadlines and we anticipate meeting all deliverable deadlines through the remainder of this project. It appears most of our site client data gathering is done. That being said, there is currently some confusion regarding measurement data from our site client. Our uber client is giving feedback about us needing certain measurement data, but AWARE doesn’t have any. We hope to clarify this with our uber client this Sunday. Similarly, we struggled with the “Standards” section of the Task Analysis and would appreciate clarification on that section.

Initially the team came up with some agreed upon methods of communicating and working efficiently together. These methods and agreements were put into our team charter. Some communication and work imbalance in the team was discussed in our synchronous team
meeting this week. Issues with Asana and Google Docs were raised to help address these imbalances, such as using *Suggesting* mode in Google Docs, and using *Inbox* in Asana to ensure communications are not missed. Unfortunately, even after addressing the workload balance issues and the need for everyone to contribute, internal deadlines (reviews) were missed on the Task Analysis. This is worrying some team members since it’s a recurring issue that we’ve tried to address multiple times.

There is some concern regarding scope. We did get some critical feedback from the uber client in our last class meeting, during the questions at the end. As a result of that feedback, we drastically changed the scope of our task analysis. We were concerned that the site client would be disappointed as trauma informed communication is her expertise; however, she was in complete agreement. Even though we cut a huge amount to stay in scope, scope may not yet be fully resolved.

**What potential obstacles do you see related to what you will be working on next?**

An immediate challenge we’re working on is including and using all the information we have in the right way for our project deliverables. This is not an obstacle that will stop our progress, but it will require the input, dedication, and work of our entire team in order to be successful. We’ve discussed group and individual accountability and will continue to do so.

Aware does not have measuring sticks that we seem to need for our performance and task analyses. We are in need of a more precise target that we are shooting for in order to create effective analyses and learning objectives. We plan to clarify our role and scope with the uber client and the site client in order to narrow our focus.

Completing the job incumbents survey in order to allow the supervisors time to complete the survey is a large potential obstacle. As we work on the performance analysis pass #2 we may find it challenging to process the data, analyze the data, and write a detailed performance analysis in time for our internal pass #2 deadline which we already pushed to 10/8 in order to perhaps incorporate data from the upcoming participant survey. This is proving to be an issue with workload balance due to what is involved in creating interview and survey instruments, data gathering, and conducting our analysis. Since our project author (James) has a heavy workload with site client preparation and visits, the other team members have agreed to work on the data analysis and leading of deliverables. Ensuring this is proceeding in a balanced manner as planned is necessary to overcome this obstacle. Based on the early successes we’ve had in planning ahead and using online tools to constantly collaborate, it is anticipated that we will be able to address these and other obstacles in a successful manner.

**What, if any, help will you need to overcome the obstacle(s)?**

Continuing the regular meetings with our uber client to ask for guidance and feedback, especially regarding AWARE lack of extant measurement data, and to make sure we are generally on track. Checking in with team members to ensure a balanced workload. Continuing team meetings to address issues as they arise and issues that have arisen.
Meeting deadlines and working together will continue to challenge and stretch us, but we have shown we are up to the challenge.

Teamwork Successes

What aspects of working as a team have gone well?
- Communication methods: Google Hangouts, Asana, and Google Docs. Email, text messages, and phone calls are secondary forms of communication we employ.
- Positivity amongst team members.
- Team members using their strengths to contribute effectively to the group.

What will the team do to build on those successes as the project continues?
- Keep momentum in the weekly meetings.
- Continue to utilize Asana and other tools for project management and process improvement.
- Remain open to suggestions from team members, instructor, and client.
- Team members respond to feedback to improve team performance and workload balance

Teamwork Improvements

What aspects of managing partnerships and collaborative relationships with project stakeholders could the team improve upon?
- Our communication with and collaboration with the site client has flowed very well throughout the recent weeks. We’ve also arranged to bring the client in on some of our planning in order to cover what is important while we plan. Continuing to look for opportunities to collaborate and being open to our client’s ideas will allow our project to succeed.

What aspects of managing partnerships and collaborative relationships among its members could the team improve upon?
- Balancing personal and professional schedules (since we all have different obligations, schedules, etc).
- Continuing to learn each other’s strengths and use them for maximum benefit.
- Each member of our team has committed to make real substantial contributions to each deliverable. In this way we will avoid a single member making all the effort with a sign off from the others. Rather we’ll have an output that is truly the product of collaboration.

How might the team better plan and manage its instructional design project?
- Regularly evaluating what has gone well and what areas need improvement during weekly team meetings. This is a standard item on every meeting agenda to guarantee
opportunities for better planning and project management. So far we’ve done well at creating meeting agendas with important considerations and discussing what needs to be discussed.

- We must continue to manage the scope of our project in order to ensure we aren’t expanding too much, as is very easy to do. We’ve already identified and eliminated some areas we spent much time on only to discover they were outside our scope. As hard as this is to do, it is vital to keeping our project on track and within our ability.
- We’ve confirmed that all team members are comfortable with key features of the programs we’re using. Throughout our meetings and other forms of communication we’ve shared tricks that we’ve learned. In order to create the best outcome possible we all must be willing to continue sharing tips and ideas for improvement. This even includes critiques when appropriate.

What steps will the team take to improve these aspects? What, if any, help will you need?

- When opportunities are identified and changes are adopted, remain open to continued improvement.
- After Action Reviews (AARs) are an indispensable component of our learning as we go. Identifying what went well and what our areas in need of improvement is not to be overlooked as we go through our projects.
- One thing our team has excelled at so far is trying to understand and appreciate the position of other teammates. By putting ourselves in each others shoes we’ve developed a real appreciation for each other. Continuing this pattern will be vital as we move on.
- Individual team member agree to speak up if they see a need for a change. We have done well at this so far and we must hold ourselves and each other accountable. Doing so has helped us build rapport, strengthen group cohesion, and establish trust among team members.
Overall Project Status in Relation to Schedule

Project Status Summary:  _x__ Green  ___ Yellow  ____Red

Team AWARE has successfully made it through the stages of forming, storming, and norming. At this point we are solidly in the performing stage. As we continue to work together we are firing on all cylinders and working together to create a quality work product that we can all be proud of.

What parts of the project has the team completed?

- We’ve agreed on helpful tools to organize our project work and to work on individual parts on the project, including Asana, Google Docs, and Google Hangouts.
- All of our remaining scheduled tasks from the project description have been organized with tasks assigned and deadlines set in our project management tool, Asana.
- We’ve reviewed pertinent information from our instructor led class meetings.
- We’ve integrated feedback from classmates and our uber client into our deliverables.
- We set a recurring time for weekly group meetings and consistently held productive meetings.
- We’ve had team wellness checks with Steve and team representatives have shared notes with the team. Based on our team success we opted to discontinue regular team wellness checks and have determined to hold them on an as-needed basis going forward.
- We’ve turned in several team deliverables including our Project Description pass #1 and #2, Team Charter, Team Project Status Reviews #1 and #2, Task Analysis pass #1 and #2, Performance Analysis pass #1 and #2, Learner Analysis pass #1 and #2, Objectives pass #1 and #2, Performance Assessment Instrument pass #1, and Instructional Plan Worksheet pass #1.
- In preparation for the remaining project deliverables, James has met with and interviewed our client in person to gather information and share ideas multiple times. He met with some supervisors and direct reports this week, gaining insight into authentic reasons for reluctance setting goals.
What parts of the project are in progress?
We are currently awaiting feedback on our Instructional Plan Worksheet pass #2 and Performance Assessment Instrument pass #2. As with every deliverable and data gathering instrument, we have internal deadlines set for initial drafts of these to be complete in order to give the entire team the opportunity to review and contribute to each task.

As our work is in progress, conversations between team members are constantly ongoing through the chatting tools available in Asana and the commenting features in Google Docs. This communication assists us in making our work run smoothly and efficiently.

What parts of the project will the team work on next?
Over the next several weeks we’ll work through the following items.

● We’ll attend team meetings and wellness checks as needed.
● We’ll complete the job aid.
● We’ll complete an advance organizer.
● We’ll finalize our Instructional Plan pass #1 and #2.
● We’ll complete an Instructional Design review.

All of these tasks are outlined in our upcoming due tasks within Asana.

Actual or Potential Roadblocks

What obstacles has the team run into so far and how did you work through or around them?
We’ve remained fluid and adjusted to team and individual circumstances that have arisen. Our internal deadlines have been pushed out on occasion as we focus on team contributions. As a result of us scanning through handouts and other materials relating to upcoming deliverables, thankfully we haven’t missed any deadlines and we anticipate meeting all deliverable deadlines through the remainder of this project. Most of our site client data gathering is done, however we still have an open line of communication with our site client and continue to solicit feedback. As we’ve worked hard to improve our project, we’ve had a healthy amount of back and forth conversation with our uber client to try to get our pass #2 deliverables as close to perfect as we can.

Initially the team came up with some agreed upon methods of communicating and working efficiently together. These methods and agreements were put into our team charter. Some communication and work imbalance in the team was discussed in our synchronous team meetings over the last month. As we were working through issues of an imbalance of the workload, the fourth member of our team bowed out of the project and the class due to personal issues outside of the the class. Going forward as a three person group was a slight adjustment and it meant more projects assigned to each member, however things have run much smoother in the ensuing weeks. We’ve spent much less time discussing workload balance and individual
team members have stepped up in a big way to fill in the gaps created by losing a team member. We have also changed some of our collaboration strategies and project management techniques. If anything, our team is running smoother now than ever.

Earlier on in the project there were issues regarding scope that we tried to sort through as we realized we were planning to cover more subjects and material than we had time to do efficiently. Through discussions with our site client, our uber client, and amongst ourselves, we narrowed the scope into a manageable and efficient plan.

We did find the Suggestion feature in Google Docs sometimes meant that the document became overwhelmed with suggestions and comments. This was especially the case when the team beach-balled on Pass 2’s. Valen made the suggestion that if one of us saw a need to overhaul, we should make the changes in another document first. This meant that instead of dozens of suggestions cluttering up our document, there was one manageable suggestion. Additionally, we made use of the Version History function and found it be be very powerful and useful.

What potential obstacles do you see related to what you will be working on next?

More than ever in the life cycle of this project, our team is meshing well and looking forward to the next steps of our project. In our most recent team meeting, positivity and optimism prevailed. We know we have challenging tasks ahead of us that will require intensive efforts but we do not foresee any major obstacles impeding the way.

What, if any, help will you need to overcome the obstacle(s)?

Continued open communication amongst our team will aid us in successfully completing our instructional design plan. We'll continue to hold team meetings weekly, as well as our meetings with our uber client. On top of that we know team wellness checks are also available as needed.

The main help we need from our uber client is feedback and occasional clarification of feedback. We have worked hard to make necessary improvements based on our feedback and on occasion we’ve either misunderstood areas or needed clarification on areas. We’ve shown that we value the feedback we receive and have made incredible progress and improvements to our deliverables through the integration of feedback.

Meeting deadlines and working together will continue to challenge and stretch us, but we have shown we are up to the challenge.
Teamwork Successes

What aspects of working as a team have gone well?

- Communication methods: Google Hangouts, Asana, and Google Docs. Email, text messages, and phone calls are secondary forms of communication we employ.
- Positivity amongst team members.
- Team members using their strengths to contribute effectively to the group.
- Team members stepping up and filling voids created by the loss of a team member.
- Team members showing willingness to work hard and put in time and effort to create quality project deliverables.

What will the team do to build on those successes as the project continues?

- Keep momentum in the weekly meetings.
- Continue to utilize Asana and other tools for project management and process improvement.
- Remain open to suggestions from team members, instructor, and client.
- Respond to feedback to improve team performance and workload balance.

Teamwork Improvements

What aspects of managing partnerships and collaborative relationships with project stakeholders could the team improve upon?

- Our communication with and collaboration with the site client has flowed very well throughout the recent weeks. We’ve also brought the client in on some of our planning in order to cover what is important while we plan.
- We’ve taken client suggestions seriously in order to be able to provide an authentic, quality project to them that they can use and benefit from. Continuing to look for opportunities to collaborate and being open to our client’s ideas will allow our project to succeed.

What aspects of managing partnerships and collaborative relationships among its members could the team improve upon?

- Balancing personal and professional schedules has been an area of focus where we’ve made great strides.
- We’ve got a great handle on learning and benefiting from each other’s strengths. We believe continuing to use this knowledge for maximum benefit will continue to yield success.
- Each member of our team has committed to make real substantial contributions to each deliverable. We’ve seen this play out successfully over recent weeks. We’ve work hard to avoid a single member making all the effort with a sign off from the others. Rather we’ve had outputs that are truly the product of collaboration. We are committed to continuing this approach.
How might the team better plan and manage its instructional design project?

- Regularly evaluating what has gone well and what areas need improvement during weekly team meetings. This is a standard item on every meeting agenda to guarantee opportunities for better planning and project management. We’ve done well at creating meeting agendas with important considerations and discussing what needs to be discussed.
- We must continue to manage the scope of our project in order to ensure we aren’t expanding too much, as is very easy to do. We’ve continued to identify and eliminate areas we spent time on only to discover they were outside our scope. As hard as this is to do, it is vital to keeping our project on track and within our ability.
- We’ve confirmed that all team members are comfortable with key features of the programs we’re using. Throughout our meetings and other forms of communication we’ve shared tricks that we’ve learned. In order to create the best outcome possible we all must be willing to continue sharing tips and ideas for improvement. This even includes critiques when appropriate.
- Overall, remaining steady in the course we’ve outlined and used to this point needs to be followed. We’ve created a recipe for success and we must strive to persevere to the end of our project.

What steps will the team take to improve these aspects? What, if any, help will you need?

- When opportunities are identified and changes are adopted, remain open to continued improvement.
- After Action Reviews (AARs) have been an indispensable component of our learning as we go. The importance of identifying what went well and what are areas in need of improvement is not to be overlooked as we go through our projects.
- One thing our team has excelled at so far is trying to understand and appreciate the position of other teammates. By putting ourselves in each other’s shoes we’ve developed a real appreciation for each other. Continuing this pattern will be vital as we move on.
- Individual team members all agree to speak up if they see a need for a change. We have done well at this so far and we must hold ourselves and each other accountable. Doing so has helped us build rapport, strengthen group cohesion, and establish trust among team members.
References

Appendix A: Mastery

It is desirable to see supervisors meet the standards of the criterion multiple times to verify mastery. Therefore, an additional authentic on-the-job practice (practice 4) with facilitator support and feedback will be conducted to enhance transfer of skills to the workplace. Following this final practice, this assessment will act as a single mastery assessment and will be carried out after the training event and after practice 4. It will take place the on-the-job during a real Supervision Meeting for authenticity.

Appendix B: AWARE Supervision Meeting Job Aid

(next page)
SUPERVISION MEETING

Job Aid

1. Prepare

2. Facilitate the Meeting
   - Win
   - Challenge
   - Set Goals

3. Follow Up
Arrange Meeting ➔ Use Google Calendar to create an event. Add the direct report as a guest so it appears in their calendar.

Review ➔ Review previously set goals in preparation to ask about wins and challenges.

Carry Over Items ➔ Are there any other carry over items from last week?

---

Job Duty Win ➔ Prioritize discussing wins related to last week’s goal.

- Not a relational client success.

- Jamie has been focusing on keeping on top of important paperwork. This week, she submitted all paperwork on time by setting a 3 PM paperwork reminder using Google Tasks. Celebrate!

- Laura has an emotional breakthrough in connecting with a participant that’s having a hard time. [This is relational].

Celebrate the Win

- The success is useful in solving problems. It’s inspirational and authentic.

- Congratulate them immediately.

- Publicly share their success as soon as possible.

- The success is NOT useful in solving problems. It’s NOT inspirational and authentic.

- Congratulate them immediately.

- Make a note of the steps they took and include this in Follow Up below.

---

Job Duty Challenge ➔ Prioritize discussing challenges related to last week’s goal.

- Avoid emotional and relational challenges.

- Georgie is having difficulty finding a good time to complete important paperwork. Crises and emergencies come up that seem much more important.

- Laura was triggered by an emotional situation one of her clients is presenting.

Validate ➔ Don’t rush to fix their problems. Listen, validate, empathize.

- I can see why ______ would be challenging.

Empathize ➔ I remember when I faced a similar challenge at ____.

- I haven’t dealt with this kind of issue before, I can only imagine how you must feel.
### Determine Attitude ➔

- Do you think goal setting is a useful tool?

- Do you see goal setting as an Extra burden?
- Do you find setting goals Overwhelming?
- Do you feel that if you need to set goals it means you’re Failing?
- Are you concerned you’ll be Micromanaged?
- Do you find the process too Formal and Structured?
- Are you concerned it will result in Reprimand?

### Reassure

- Validate & empathize.
- I can see why (it feels like an extra burden).

- This is not about me telling you what your goals should be or giving you extra work. It needs to be a goal you value and care about and want to accomplish.

- Goals should help you focus on what’s important to you and to AWARE. They should be doable to help you move forward and make progress.

- I don’t see it that way. This is about you setting a goal each week that’s important to you and to AWARE. It’s about moving toward something better.

- This is your goal. My input is to help you make it small, manageable, and achievable.

- My goal with this is that it’ll help you grow and feel like you’re doing your best work. I do think making goals can help with focus and direction.

- My objective is to help you succeed, not to give you a hard time or reprimand you.

### Prompt Goal Ideas:

- **Important to the Direct Report**
  - Is this something you care about?
  - What is the most important thing about performing your job duties that you want to improve?
  - What job duties are causing you the most pain?

- **Align With AWARE**
  - How does your goal idea align with AWARE’s mission?
  - What do you think is causing AWARE the most pain?
  - What do you think will help AWARE achieve its mission?

- **Independently Own**
  - We want your goals to be something you can address yourself.
  - Is there something you can get started on by yourself?
  - If you were to take the initiative, what steps would you take?
  - How can you change your goal idea so it is something you can do independently?

- **Goal Setting Worksheet**
  - Fill out the Goal Setting Worksheet.
Follow Up

Schedule Next Week’s Meeting

Use Google Calendar to create an event. Add the direct report as a guest so it appears in their calendar too.

Record Action Items

Use the note function in the Google Calendar event you created.

To publicly celebrate and share wins:
   If there was a useful win, record the step-by-step the direct report took to solve the problem.
   OR
   If the win was inspirational, record the direct report’s success story.

Create a separate personal event reminder to share your direct report’s success at the next public opportunity.

AWARE Mission
Provide direct services to survivors of domestic or sexual violence and to affect the social and political systemic changes to address oppression.

Intervention
Make changes in victims lives that positively impact safety and independence.
   Provide education and opportunities for survivors.

Prevention
Analyse system gaps that disadvantage survivors and advocate for change.
   Address (awareness & education) root causes of domestic violence.
   Address climates that tolerate sexism, racism, and classism.
Appendix C: AWARE Supervision Meeting Goal Setting Worksheet
**SUPERVISION MEETING**

**Goal Setting Worksheet**

Start with an **action word**.

<table>
<thead>
<tr>
<th>Action</th>
<th>Create</th>
<th>Organize</th>
<th>Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt</td>
<td>Write</td>
<td>Plan</td>
<td>Have</td>
</tr>
<tr>
<td>Remind</td>
<td>Revamp</td>
<td>Prepare</td>
<td>Learn</td>
</tr>
<tr>
<td>Arrange</td>
<td>Fill out</td>
<td>Make</td>
<td>etc.</td>
</tr>
</tbody>
</table>

Followed by the specifics of an **object** that will be acted upon.

<table>
<thead>
<tr>
<th>Action</th>
<th>Client(s)</th>
<th>Partner(s)</th>
<th>Paperwork</th>
<th>A workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan out</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>my schedule</td>
<td></td>
<td>Coworker(s)</td>
<td>A schedule</td>
<td></td>
</tr>
<tr>
<td>Details</td>
<td></td>
<td></td>
<td>etc.</td>
<td></td>
</tr>
</tbody>
</table>

**Example:**  
Plan out **my schedule** for next week in blocks of 30 minutes.

**What** is your **goal**?

**When** will you have completed the action?

**Example:** Thursday at 3pm

How will you **know you’ve achieved** the goal?

**Example:** Every 30 minute block for the work week will be accounted for.

**Criteria Checklist**

- **One or two goals**
- Achievable within **1 week**
- **Important to the direct report**
- Direct report can **address independently**
- **Aligns with AWARE’s** mission, vision, & values
Appendix D: Role Descriptions
Instructions
You are the direct report. The boxes marked ❌ are problematic for you:

- You are happy to set goals (attitude).
- You can independently own your goal.
- Your goal is time-bound.
- Your goal is measurable.

- Your goal: is important to you, aligns with AWARE, and you have 1 or 2 goals.

Any problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals:

Yes! This is great. I love making goals.

Your Goal

What’s Your Goal?                          Revised Answer

1. Research effective ways to motivate residents to do chores.
2. Create a prototype plan that I can test.

Is this something that’s important to you?

Yeah! This will hopefully help improve the residents’ environment, and maybe I’ll learn principles that will help with my teenagers!

Does it align with AWARE’s mission?

Yes, if I can do this effectively, residents will feel more comfortable and maybe it can help them feel more independent.

When will you carry out the action?

1. Tuesday, 4 PM
2. Wednesday, 4 PM

How will you know you’ve achieved the goal(s)?

I have 2-4 good ideas. I have written a prototype plan, ready to test.
Instructions
You are the direct report. The boxes marked ☑️ are problematic for you:

☒ You are happy to set goals (attitude).
☒ You can independently own your goal.
✔ Your goal is time-bound.
✔ Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: Not really. I’m already so busy. Goal setting just feels like an extra burden.

Your Goal

What’s Your Goal?
Update the safety plan presentation. I haven’t done it yet because I’d like to sit down with you and work on it together.

Is this something that’s important to you?
Yeah! The presentation slides could be clearer and less wordy. I just want to make sure I do it correctly.

Does it align with AWARE’s mission?
Yes. A safety plan can have a huge impact on victim’s independence and safety.

Revised Answer
1. Revamp safety plan slides.
2. Create a “smile” sheet to get feedback about the presentation.

When will you carry out the action?
1. Tuesday, 9 AM
2. Friday, 9 AM

How will you know you’ve achieved the goal(s)?
1. All slides have been changed to visually reinforce the content of the presentation.
2. The smile sheet asks about the value of each concept in the presentation.
Instructions
You are the direct report. The boxes marked ✗ are problematic for you:

- You are happy to set goals (attitude).
- You can independently own your goal.
- Your goal is time-bound.
- Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: If I'm being honest, no. It's a little too formal and structured.

Your Goal

What’s Your Goal?

I’d really like it if the residents got some useful workshops. Like maybe a resume writing class.

But I'll need some HELP with knowing how much time they'll need for the workshop, what the cost will be, what needs to be done regarding contracting, etc.

Is this something that’s important to you?

Yeah! I think it's exactly what some of the residents need right now.

Does it align with AWARE’s mission?

Absolutely. It provides education and opportunities for survivors.

Revised Answer

1. Find 3 resume writing trainers.
2. Ask trainers; how much time they’ll need for the workshop, what the cost will be, what I need to do regarding a contract.
3. Choose one trainer. (Combine goal 2 & 3)

When will you carry out the action?

I don’t know, my schedule’s all over the place. It’s easier to do it in the moment when I have some time.

1. Today, 2pm
2. Thursday, 9am

How will you know you’ve achieved the goal(s)?

I have found a trainer. I know: how much time, the cost, and information about contract requirements.
Instructions
You are the direct report. The boxes marked ☑️ are problematic for you:

☑️ You are happy to set goals (attitude).
☑️ You can independently own your goal.
☑️ Your goal is time-bound.
☑️ Your goal is measurable.

Your goal: is important to you, aligns with AWARE, and you have 1 or 2 goals.

Any problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: Yes! This is great. I love making goals.

Your Goal

What's Your Goal? Revised Answer

1. Research effective ways to motivate residents to do chores.
2. Create a prototype plan that I can test.

Is this something that's important to you?
Yeah! This will hopefully help improve the residents' environment, and maybe I'll learn principles that will help with my own teenagers at home!

Does it align with AWARE's mission?
Yes, if I can do this effectively, residents will feel more comfortable and maybe it can help them feel more independent.

When will you carry out the action?

1. Tuesday, 4 PM
2. Wednesday, 4 PM

How will you know you’ve achieved the goal(s)?

I have 2-4 good ideas. I have written a prototype plan, ready to test.
Instructions
You are the direct report. The boxes marked ☐ are problematic for you:

☑ You are happy to set goals (attitude).
☑ You can independently own your goal.
☑ Your goal is time-bound.
☑ Your goal is measurable.

☑ Your goal: is important to you, aligns with AWARE, and you have 1 or 2 goals.

Any problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: Oh yes. I love having goals to shoot for.

Your Goal

What's Your Goal? Revised Answer

1. Plan out my schedule for next week in block of 30 minutes.

Is this something that’s important to you?
Yeah! I often get tunnel vision when I get busy. This will help me stay on task.

Does it align with AWARE’s mission?
Yes. If I can schedule my time better, I'll be more effective in my job role.

When will you carry out the action?

1. After this meeting

How will you know you’ve achieved the goal(s)?

Every 30 minute block for the work week will be accounted for.
Instructions
You are the direct report. The boxes marked ✗ are problematic for you:

- You are happy to set goals (attitude).
- You can independently own your goal.
- Your goal is time-bound.
- Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: Not really. I’m already busy dealing with crises and emergencies and adding goals is just overwhelming.

Your Goal

What’s Your Goal?

I need to clear the air with Eden. She just dominates the conversation and talks over me all the time and it’s making for a very unpleasant work environment.

I think it would help if you mediate the conversation.

Is this something that’s important to you?
Absolutely! I’ve tried ignoring it, but it’s not working.

Does it align with AWARE’s mission?
Yes. It’s not making for a positive environment -- which we need.

Revised Answer

1. Tell Eden her talking over me is bothering me. Be calm and respectful.
2. Ask Eden to suggest a solution.

When will you carry out the action?

Tomorrow afternoon.

How will you know you’ve achieved the goal(s)?

I told Eden my concern. I was calm and respectful. We agreed on a solution and next steps.
Instructions
You are the direct report. The boxes marked ✗ are problematic for you:

- ✓ You are happy to set goals (attitude).
- ✓ You can independently own your goal.
- ✓ Your goal is time-bound.
- ✓ Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals:

I'm not sure. I find it really demotivating when I'm given a hard time for not succeeding.

Your Goal

What's Your Goal?

Not to avoid difficult conversations with residents about substance abuse.

I’d feel more comfortable if you could be there to step in if needed.

Is this something that’s important to you?

Yeah, I want to get better at being confident and direct when I need to be.

Does it align with AWARE’s mission?

For sure. This is really about the residents safety and even their independence.

Revised Answer

1. Talk to Grace about her substance abuse. Focus on her behavior and the consequences.

When will you carry out the action?

Tomorrow before lunch.

How will you know you’ve achieved the goal(s)?

I spoke to one resident about substance abuse.
Instructions
You are the direct report. The boxes marked ☒ are problematic for you:

☒ You are happy to set goals (attitude).
☒ You can independently own your goal.
☒ Your goal is time-bound.
☒ Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: I'm not really happy about it. If feels like you're saying I'm failing, otherwise I wouldn't need to set goals.

Your Goal

What's Your Goal?
I'd really like it if the residents got some useful workshops. Like maybe a job interview preparation workshop.

But I'll need some help planning it. I don't know how much time they'll need for the workshop, what the cost will be, what needs to be done regarding contracting, etc.

Is this something that's important to you? Yeah! I think it's exactly what some of the residents need right now.

Does it align with AWARE's mission? Absolutely. It provides education and opportunities for survivors.

Revised Answer
1. Find three resume writing trainers and narrow it down to one.
2. Ask trainers; how much time they'll need for the workshop, what the cost will be, what I need to do regarding a contract.

When will you carry out the action?
Don't worry. I'll get it done before our next meeting.

1. Today, 2 PM
2. Thursday, 9 AM

How will you know you've achieved the goal(s)?
Residents have a workshop on job interview preparation.

I have found a trainer. I know: how much time, the cost, and how to make the contract.
Instructions
You are the direct report. The boxes marked ✗ are problematic for you:

- You are happy to set goals (attitude).
- You can independently own your goal.
- Your goal is time-bound.
- Your goal is measurable.

Your problematic answers are in red. Non-problematic and revised answers are in green.

Attitude toward goals: Giving me goals to work on every week feels like I'm being micromanaged.

Your Goal

What's Your Goal?

I don't maintain clear boundaries with victims.

I think it would really help to talk to you. You're so experienced at dealing with this kind of thing.

Is this something that's important to you?

For sure. I just can't afford to keep on taking work home with me.

Does it align with AWARE's mission?

Yeah, it sometimes really interferes with my job role and has other knock on effects.

Revised Answer

1. Write down where my boundaries are -- think about what I can tolerate and what makes me stressed or uncomfortable.

When will you carry out the action?

I don't know, my schedule's all over the place. It's easier to do it in the moment when I have some time.

1. Today, 4 PM

How will you know you've achieved the goal(s)?

I have something written down to show you.

I have two lists, what I can tolerate and what I can't. Each list will have at least three items.