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Integrating Innovative Employment & Economic Stability Strategies (IIEESS) Webinar Transcript

Peer-To-Peer Learning Opportunity: Coaching Observation Skills for Supervisors of Direct Service Staff

Date: July 11, 2019

TINA SMITH: Hello, everyone. Welcome to today's webinar, IIEESS Coaching for Success Learning Opportunity: Coaching Observation Skills for Supervisors of Direct Service Staffing. My name is Tina Smith, and I will be the host for today's webinar. Before we get started, I wanted to review a couple of housekeeping items with you to explain how you can participate in today's webinar. When you joined today's call, you may have noticed that you have been placed in Listen Only Mode. If you have questions you'd like the presenter to address, please submit them in the Q & A box located on the right-hand side of your WebEx window. When you logged into your webinar today, your screen should have looked like the area on the top-right of my slide. On the far right of the screen, you should see a section where you can chat or submit questions. Even though both sections are available to you, please submit all of your questions using the Q & A box only. You also have the ability to change the view on your screen. To change your view, please select the Full Screen icon located in the upper-right hand corner in the same window as the presentation. You can see this highlighted on my slide. To exit Full Screen Mode, hover your mouse at the top of the screen and select the Preferred View options by clicking on the Full Screen option. Please note that today's webinar will be recorded. If you experience any difficulties during the webinar, please call WebEx Customer Service number at 1-866-229-3239, Option 3.

Today's webinar will be presented by Mrs. Stephanie Brueck-Cassoli and Ms. Diana Rocha. Our first presenter, Ms. Stephanie, is a part-time faculty member at Boston College's School of Social Work, teaching family therapy. Professor Brueck-Cassoli is also the Director of Curriculum and Instruction for EMPath, focusing on overseeing quality assurance and providing training to organizations across the country. She has a Bachelor's from Washington and Jefferson College, and her Master's in Social Work from Boston College. Our second presenter, Ms. Rocha, is a Senior Learning Specialist at EMPath. She is skilled as a facilitator and trainer with experience in developing capacity building at EMPath. Ms. Diana trains new staff and works with supervisors and their teams to develop capacity building. She also specializes in creating and managing culturally competent mentoring programs. Diana was a member of the team that introduced Mobility Mentoring to EMPath ten years ago. She's a strong advocate for children and families with disabilities, and knowledgeable in special education. At this time, I'd like to give the floor to Ms. Stephanie to begin her presentation.

STEPHANIE BRUECK-CASSOLI: Thanks so much, Tina. Hi everyone. It's great to see you in this webinar format again. It's been a joy to be able to be working with all of you throughout all of these webinars. And so, as Tina mentioned, I'm Stephanie Brueck-Cassoli, and I'm joined by my colleague Diana. And this map is up here just to remind all of us of who is in this wonderful learning cohort, and based on registration, it looks like most of you are very well represented in these states, and so we look forward to hearing from you throughout the webinar. As Tina mentioned, we're going to use the Q & A box primarily today. There will be time at the end for questions, and we will respond to those, but if things come up throughout, please feel free to submit your questions and Tina will make sure that Diana and I have all of our executive function skills intact to be able to answer those as we go.

And as has been tradition here so far, is to use a little ice breaker to get us engaged and warmed up and ready and excited to participate in this webinar. So, since it is summer, and it is definitely very warm here in Boston today, the question for all of you, which Tina is going to put into a little poll, so then you can all respond to the poll and we'll see which wins. So for your summer treat, do you prefer ice cream or popsicles? Let's see which wins.

TINA: Here are the results of the poll question. You should see them shortly.

STEPHANIE: That was so fast. So, it looks like we have a winner of ice cream, with 46% and 25% popsicles, and then we've got 29% who have maybe a different type of treat that they want. And I don't know what that is, but maybe one day, we'll find out what those different treats are. Maybe it's like ice-cream cake, having kind of the best of both worlds. Who knows? But either way, ice cream or popsicles sound pretty great to me right now. So a little bit of a tease, but we're now going to go through our webinar, so hopefully you're not thinking about those treats too much as we go through it. Thank you for participating in that. It gets us all warmed up and used to this system, too.

So, for today's webinar, we are going to focus on a coaching observation tool. And we have prefaced it in the long title for today, and it's primarily focused for supervisors of direct service staff, so for supervisors to be using with their staff to help with the coaching process, of continuously improving your coaching model in your state. So we're really lucky to have Diana with us today, who has been the one who has spearheaded and really been the creator of this tool at EMPath, and she's going to be able to share historical knowledge about how it was created, and why and how it's used at EMPath, so that you can then hear some experiences of it and think about what might work for you in the future. And we are also going to use our coaching framework to orient us to the way that we think about this tool, because as supervisors, we are coaches. And then we are really lucky, because our other colleague, Jen Lowe, who I think is in the background there with Diana somewhere, is going to join us later in the webinar, who did this tool with South Dakota on one of the coaching visits. So she's going to be able to share how that went in South Dakota and give a really nice story that might feel really applicable to all of you. So that is our plan for today.

And what I'm going to do now, I'm going to turn it over to Diana just briefly so she can give you a framework of what this observation tool is. I do want to give you a little heads up that what you're going to see on the screen is a very small version of the observation tool, and you're going to see it a couple times in the webinar. Please don't feel like you have to read the small font that's on the screen. It's there really to give you an idea of what does this look like in concept, and you will be able to download the full observation tool at the end of this webinar. So, with that, Diana.

DIANA ROCHA: Thank you, Stephanie. Hello everyone, thank you for joining us today. So yeah, this is like a snapshot of our coaching observation tool. And the idea about creating this observation tool was during a meeting, we were having a meeting, and somebody said, "How can we support our coaches and their work with participants? How can we sort of measure how they're doing their coaching, what kind of coaching styles they have?" So, I was reflecting on that question, because yes, it's really important to see how we can support our coaches, to see if there's trends, and to see if there are areas for growth. So I was sort of thinking about that, and that's when I started thinking about developing this tool, thinking about the coaching, thinking about goal-setting meetings. And I started brainstorming about the process that I have used with participants, and what I have seen other colleagues doing when they're meeting with participants. And that's how I started developing the tool. And thinking about making it sort of simple as well as meeting expectations. The second column is Needs Improvement, and the last column is Not Observed, because sometimes there are things that don't happen in the meeting, so we are not observing, and it's important also to record why we are not observing something. But in short, the tool was created to figure out how we can support our staff members to be better coaches.

STEPHANIE: Awesome. Thank you so much Diana, for giving that quick introduction to the tool, and we will continue to orient the rest of today's discussion on this. So, in the vein of coaching, I did want to bring us back to our roadmap to coaching, which, this shouldn't be new to any of you, you've seen this in either your in-person coaching trainings or through these webinars, and the reason we brought it back is just to remind us that when we're talking about an observation tool, we really want to be clear that we're grounded in a coaching perspective. So the purpose of the observation tool is not to determine if a coach is good or bad and make it feel evaluative in that way. The purpose is to have it be a joint collaborative experience and to figure out what are the strengths, what are the areas of growth, and how can you work together to support that coach in their development. And hopefully, it is bi-directional such that the coach is able to verbalize to you as a supervisor, as well as the other coach, what you can do better to support them. So we just wanted to make sure that we orient all of us to this concept, because we're going to use it to go through the coaching observation tool. And you've heard this from previous supervision webinars as well, but the concept of parallel process very much rings true.

And so we are going to go through the roadmap and we're going to start with building trusting relationships. How do you build that with your staff person, introducing an observation tool and how do you create an environment in which that feels safe and which they want to engage in that process with you? Self-assessment and goal setting for this part is going to be about the coaching observation tool and where do staff have the opportunity to self-assess their strengths, their challenges, and the support that they'd like to see? And what kind of goals do you then set up together for their continuous employment? And then how you collaboratively problem-solve, remain goal-oriented, and then what your role as a supervisor is in terms of accountability and follow-up? So if you think about the coaching relationship, you can see how this very much mirrors that parallel process that we've talked about and how, if we create that space in our supervision, we are then setting up our staff for success to be able to use those same coaching values and perspectives in their work. So, back to Diana to orient us to building trusting relationships.

DIANA: Thank you. So I'm going to share with you how I used the observation tool with a couple of teams here at EMPath and how we...what I learned of the challenges that I found along the way. So first, let's talk about building trusting relationships. So, let's talk about setting the stage for the coaching observation. So the first step that I took was to meet with the supervisor of the team. I introduced the tool that we developed and I talked to her about the whole goal was to really support coaches and their work with participants. She was a little bit nervous about the idea, because it was something new for us, for everybody, but I also reminded her about our culture here at EMPath, our culture of learning and trying new things, so it was a good reminder that, yes, it's okay to try new things, and I say, "You know if it works, that's great. If it doesn't, try something different." But she was committed to try this new tool.

After that, the next step was to meet with her team. At a regular meeting—so we didn't create another meeting, because we're all busy, and I didn't want to have for the staff to have another meeting. So in the regular meeting I came, I introduced the observation tool, and again I reminded them that we are here to learn and we are here to support each other, and that I just wanted to try this new tool with them. They were a little bit nervous about it, again. That happens when there is something new, oftentimes, which they are trying to figure out, "Why are we doing this?" But the message was to see something that is going to help us long-term. Something that is going to... we're going to learn about our strengths, we're going to learn about our areas of growth and at the end, the participants are going to benefit from this. They were really good about talking about their challenges, they were talking about… they were worried about participants, and they were worried about are we sort of evaluating them? Is somebody going to be fired after this evaluation, after this observation tool is used?

So they had a lot of questions, which I really liked that, because it's about building trusting relationships here, and this team felt really comfortable talking about all their concerns that they have for themselves and for their participants. It was a safe environment where everybody was comfortable talking about their concerns, and I really appreciated that. And the only thing that really they pushed for was more about the participants. They really didn't want the participants to think there was something that they were not doing or that they were doing. They wanted to make sure that we explain to our participants this process in a way that it was more for our own learning, this was a learning tool for all of us.

When I went there to meet with them, I sort of prepared a letter that we can send to participants to explain the process. They didn't like that idea. They didn't want to use a letter. They wanted to call the participants themselves, or they said, next time we come, we have a new participant, they really wanted to talk to them about it. And I also appreciated how during that meeting, the supervisor also voiced her concerns. So it was a good meeting, because everybody was able to express their concerns in a positive way and we were able to have an agreement to try it. “Let's try this and see what's going to happen.” So for... and during that meeting, we also reviewed the observation tool. Each line by line, you will receive at the end of this webinar, a copy of the observation tool. You will see, it's like four pages long, and during that meeting we were able to read every line and to talk about that. So something for you to think about in the future when you're ready to use something like this.

STEPHANIE: Diana, can I add something, for a moment?

DIANA: Sure.

STEPHANIE: So, I just want to take, just a quick zoom out in terms of context, because I don’t know if we were clear about this, but we're really lucky at EMPath because we have Diana, who is someone who can support the supervisors and the staff. So she's been able to create this tool and pilot it with the teams, with the goal that this moves the process to be owned by the supervisors, so to speak, but we've been able to have this capacity-building team, Diana and me, and we're able to pilot these different approaches. And so I just wanted to provide a little bit of context as to why Diana was talking about working with supervisors. But it still applies in the same way. Diana's also using a parallel process. That's all. Thank you, Diana.

DIANA: Thank you, Stephanie. So creating momentum. So after that meeting, I was able to meet with each staff member to highlight again that this was a learning opportunity for us. We reviewed the tool again. I just wanted to make sure that they feel comfortable, because again, they were a little apprehensive about the process, and I understand that. I talked about how uncomfortable they will probably feel about having somebody shadowing their meetings. And yes, they raised all those concerns about that. But again, it was… my main goal was to really show them that I was not there to criticize what they're doing. It was more about to support them. The long-term goal was going to be how can we support our staff members so they can do great work with our participants? So very important is to think about our participants and who will be willing to participate in the shadowing. And they did find some participants that were able to… that welcomed the idea, and we just set up the meeting.

I'm sorry, I'm going to go back here. Sorry. Sorry about that. Before... So for this part of supervision as parallel process and self-assessment and goal setting, the staff members, they identified their meetings that they wanted me to shadow to observe. Some of them wanted me to go to a goal-setting meeting. Some of them wanted me to go to a coaching meeting, a regular coaching meeting, and that was okay. It was their choice what meeting they wanted me to go to. I think something that was suggested, it was for… the supervisors said, you know, "I want to tell you what are her strengths,” for the staff member. What are the staff member's strengths? What are their areas of growth?" And at that moment, I didn't want to know that, because I wanted to go into that meeting without having any preconceptions about what I was going to observe. But of course you know your staff members now and you have a good idea of what their strengths are and their areas for growth, so it will be more for you to ask them, what are their... what do they think are their strengths and that will be part of the parallel process and so on.

Okay, so let's talk about the observation and using the tool. So before doing that, I set up an appointment with the staff member that I was going to shadow, because I wanted to make sure that after the shadowing, we have time to talk about her experience and my experience doing this shadowing. So we set up that, it was like 24 hours after the meeting, and she was also eager to learn about what I was thinking, about what I observed. And after that, I went to... we were doing home visits so I went to a participant's home, and the first thing I did was to thank the participant for allowing me to shadow their meeting, and I thanked the staff member also for allowing me to be there. And I sat in a place where I could see and hear both participant and mentor. And I brought the tool with me and I took a lot of notes with a lot of examples of what I heard and what I observed. I just wanted to make sure I have enough data so I can provide feedback to the mentor... I'm sorry, to the staff.

Now for the debrief and the follow-up, again I wanted to be with them after like 24 hours. I wanted to make sure I have enough time to really think about what I observed and to have enough information to give them about my shadowing. So I made a list of all of their strengths, I made a list of their areas for growth, and then different things that we talk about was their experience during this. And it was really positive for them. Most of them said that, yes, at the beginning, they were a little bit nervous because they knew I was there and I was observing them, but it was okay because I never asked questions, I was just there observing. One of our staff members said that she forgot I was there, because again, I didn't ask any questions or anything. And in general, people, after having their first observation, they were fine. After having the first observation, one of the staff members told the other team members that it was fine, that it wasn't scary, and that the feedback was helpful. So after that, I was able to work very well with the team because they realized that it was more like a learning process. Does anybody have any questions?

TINA: If you have any questions, just remember to type them in the Q & A box on the right-hand side, and we will read them out and the presenters will answer them.

DIANA: Okay. So the last thing that I did was that I met with the supervisor of the team. I gave the feedback to each staff member that I observed, and I observed each member three times. And then I met with the supervisor, and I gave the same feedback that I gave to each staff member. And they saw on their strengths and their areas for growth, we realized that they needed a little bit more coaching on goal setting, and that's what we're working on with that particular team. So work more on supporting their staff on goal setting. So she's going to help them and then I'm also going to support them as a team to practice more goal setting. Okay, now, Stephanie, you want to continue, please?

STEPHANIE: Yes, there you go. I think you're talking through the coaching tool. Yes.

DIANA: Thank you. So this is one of the pages of the coaching tool. And again, you will get a copy of this after the webinar. But we wanted to show you, to highlight some areas since you can't see them very well there, but at least we can give you an example of what's there for the coaching. So one of the steps there is “sets/uses an agenda collaboratively developed with participant.” So it's really important that the staff develop an agenda with the participant. It really keeps the meetings structured. And the participant always knows what's next. And something that you can, that some members can do when you're doing the observation is to think about… you know, the participant comes into the office, so some of the questions that as a staff member you can ask is, "What would you like to talk about today?" "What's on your mind?" And then the participant can respond what's on their mind. And then you can also add what you're planning to talk about on that day, whether it's an assessment or something new that you need to communicate with the participant. So again, this is a really good way to start the meeting with an agenda.

The second one is “Encourages collaborative rather than coach-driven relationship.” When I think about that, I'm thinking about goal check-in meetings, for instance. If a participant said that she's not interested in working in a goal that she has been working on, that's okay. And as coaches we need to be clear, so we can always ask, "Tell me more about that. How come you don't want to work on that goal anymore?" And you know, we listen to what a participant is saying. Another question that we can ask, "Okay, sounds like you don't want to work on this goal. So what would you like to work on next? What are some of the things you want to do next?" So we can have… so she, the participant, is the one who is always taking control of the meeting. She's the one who's driving this meeting.

The “schedule a follow-up meeting with participant.” This is really good for accountability, and when you're finishing a meeting it's really important that you set up a meeting for next time. You can ask the participant, "Okay, when can you come back so we can continue our conversation about goal-setting." Or, "What day of the week is better for you to come?" But it's really important to have that meeting, to set up that follow-up meeting. So when you're observing, you tell the staff member that's one of the three things that are really important for us.

So this is an initial… goal-setting initial meeting, like the first time that you are setting a meeting, a goal-setting meeting. So examples that we can talk about here is to explain the purpose of goal setting and the goal-setting tool. So as participants explain what they want to accomplish with improving their lives or their children's lives, introduce the goal setting as a tool to help them identify the steps to make this happen and the supports that they may need, the challenges that they might encounter. And you can also explain that the tool helps us because of the SMART criteria. We can use the SMART criteria to make all the goals more Specific, and of course, Measurable, Attainable, Relevant, and Time-bound. That's a really good feature that has the SMART criteria. And we can also on the goal setting form that we have, so we have the steps for the participants to reach the goals, so the form is really key to support the participants.

Another example of what we have on the goal setting initial meeting is to encourage participants to identify challenges to reach goals and action steps, and to develop strategies to overcome the challenges. So as coaches we need to be very curious, and when we are writing goals with participants, one of the questions that we can ask to participants is, "What…" So for instance if the participant says that her goal is to register into a community college, one of the questions that we can ask is, "Who can support you to reach this goal? What is your main challenge to achieving this goal? What's one thing you can do to overcome the challenge?" So again, it's to really ask a lot of open-ended questions to support the participant on making sure that he or she will reach the goal.

Another example is “Treat goal setting as participant-driven and mentor-supported.” And for this again I have to say as coaches we need to be curious and ask a lot of questions. And remember this goal-setting process is participant-led. And for instance, you can say, "Well, I heard you say you were worried about not having a program for your son. What would you like to do about it?" And again, ask, you know, all these questions knowing that all this is participant-driven, depending on what she answers, depending on what she wants, that you can continue the conversation, but that she, the participant, is always the one leading the conversation.

And let's see some examples about goal setting, the follow-up meeting. So let's say that, you know, the staff members set up the meeting, set up goals for different participants, and the next time, some things… an example of that: “Ask whether anything has changed since the last meeting.” And that's a really good question, because you want to hear if there is anything that has changed for the participant. Maybe the goal that was set up last time is no longer relevant for the participant. Or maybe the participant needs to change the day when she's going to accomplish the action that's set. So this question is really important to always ask at every meeting. Another example about this follow-up meeting is to “Celebrate with the participant when goals are accomplished and reflect on the process (challenges, resources, strengths).” This is really, for me, this is a very important process here, because you really are celebrating with the participant, which is very important. Whether she reached a small goal or a big goal, it's really important to celebrate it, as well as to help the participant to reflect on how, on the process of reaching that goal, and to reflect on the support she had, to reflect on the challenges she faced and how she will overcome those challenges. And to think with her, the participant, about "I reached this goal. I was able to do this. What else can you do after reaching this goal?" And taking that opportunity to really help the participant to think about next steps.

The last example here is to hold participant and self-accountable for making progress on goals and on program outcomes. And we can do this by after the meeting, sending an email to the participant. The staff member will send an email to the participant with a recap of what happened during the meeting, next steps, the goals that were reviewed, or maybe new goals were written. And then to check in with participants, whether it's by email or whether it's by phone call or text, to really support the participant, remind her on what she's working on, to hold her, or him, accountable for the progress they are making on the goal, which is to be aligned with the program outcomes. Any questions?

STEPHANIE: There might be one that came in, although I couldn’t see it. Tina, can you see it on your end?

TINA: Yes, someone is wanting us to provide the observation tool that is more legible, because the slide is smaller. But I was going to let them know that they will get a copy at the end of the webinar for them to have for their own reference, but right now, we're just highlighting the main points from the observation tool right now.

STEPHANIE: Yeah, thanks, Tina.

TINA: But yes, the observation tool will be available following the webinar.

STEPHANIE: We promise, we promise. So what Diana just went through, which is helpful, is really talking about the main components of the tool, so the ethos of coaching and the main points that she's looking for when she's observing coaches. And you could see from the observation tool that it's broken into different sections depending on the type of meeting you're observing. And so when you then see the full tool, you'll see that all of the main points that she highlighted are reflected in, you know, more broken-down questions, so that you're also able to have some objective observations when it comes to it, which can be hard to do.

So to continue on the coaching roadmap, I wanted to point out some themes I was hearing when Diana was speaking, and you can hear that the ones that she pulled out as areas of focus typically were ones that specifically referenced having a collaborative approach between the participant and the coach. And it came up in both the self-assessment, or the coaching piece, as well as the goal-setting piece because that collaborative approach is really what undergirds that coaching relationship. And so when we think about potentially shifting from a transactional relationship that we historically used and being intentional about our coaching practice, that collaborative approach, and how to continue to reorient ourselves and remind ourselves on how to do that, that is really key. And so I really appreciated Diana's attention to that piece and calling it out in the tool so that you as supervisors are able to look to that really easily and have an intentional conversation with your staff about it.

So as Diana had mentioned, when she finishes doing the observation tool with the staff person, they set up a meeting and so it's something they know is coming well in advance, and before the tool is administered, so to speak, she's also asking of areas of growth that the staff person identified, and then in addition, after having done the tool, what are areas of growth? What are things you think you did well? And then that grounds the goal setting and goal follow-through between the supervisor and the staff person. So within supervision, we want to make sure we're allocating a certain amount of time to be able to follow up on the goals that we set with our staff around this before. So what are the learning goals that the staff person has for continuously improving their coaching practice? And how can we make sure that in our supervision time among all the important administrative pieces and data collection pieces, that we're leaving time to make sure that we are continuing to come back to the goals that they’ve set, asking how we as supervisors can support that staff person? How, if there's something we can be doing in supervision that's helpful—I've done role plays in supervision, talking through test conversations—how can we make sure we are supporting the staff person in their goals? And by doing that, you're modeling how you set an agenda with a participant and making sure that you're coming back to the goals that they set with you at first. Because what we don't do is set a goal with a participant and then three months later say, "Hey, how'd that goal go?" Right? It's a continuous process. So you're doing the same thing in your supervision meeting.

And then the last point just talked about responding rather than reacting to crises, and the point of that bullet point is just to highlight that we don't want the crises to derail the goals. And I mean that in, the goals might change over time, and that's totally okay, but we don't want the crisis to derail spending time on talking about what the staff person wants to continue to improve on. So how can we uphold our coaching practices to make sure that we're continuing to support those conversations.

So the next road sign on our coaching roadmap is problem solving. And so with this, if you set a goal with participants, likely you've noticed that that goal needs to change, and the same thing is probably going to happen with staff. There might be, you know, ways that goal was articulated that doesn't feel as applicable to a broad array of participants. Maybe it's one specific participant that really was challenging for them. But the point is that you are, in your goal-oriented meetings, you are asking the staff person what they want to improve on and what their ideas are for shifting practices. It's also great to, especially when we're talking about shifting to a coaching culture, to have that buy-in from staff about what that coaching culture looks like. So, are there things that they've learned from doing this coaching observation process that they would, as Diana mentioned the other team did, of making suggestions for what to do differently next time, or wording on the tool that might help, you know, really allowing them to be a part of the process, to help you think through how an observation practice in your program can be really effective. I do want to note that where I'm sitting, sometimes it can be a little noisy, so if you hear little voices in the background, it's because there's kids outside my door, so part of working in our office, just a heads up.

And so then with the problem solving, there are times when you as the supervisor, you know what resources exist for that staff person, or you know what your professional development budget looks like and what types of training are available to that staff person, so of course sharing those opportunities with your staff when appropriate, and again, trying to align professional development opportunities, not just what is important for the agency, but how does that align with that individual staff person's goals? And I think, before I move to the next one, I think I see another question that came in?

TINA: Uh, yes, there is another question here. Let me pull it up. Sorry about this, guys. They want to know, "Will we receive the observation tool after the presentation today?" Which, we will, we will have the observation tool available after the webinar. "And copies of the slides?" We can also do that for you as well.

STEPHANIE: Perfect, thank you. Okay, so then our final road sign is Accountability & Follow-up, and it is definitely a last-but-not-least road sign, because it's like tying a ribbon around the whole process. Because without accountability and follow-up, we really are not following through on what we said we were going to do, and therefore potentially eroding that first road sign that Diana talked about, which is Building Trusting Relationships. So if I, the supervisor, say, "This observation tool is going to be what anchors the way that we think about our continuous relationship together and your continuous development as a coach, and I'm viewing this tool as a collaborative way to help you get there and help me continue to support you," then I want to make sure I'm following on that, not using it in a different way, in an evaluative fashion. We just want to make sure we're aligned with the way that we said we were going to use it.

We also, if we say that we want input from them and we're eliciting feedback, that we find a way to either incorporate it in there or come back and share why maybe it's not being incorporated, and if there are other opportunities for their ideas to be used in another place in our programming. I think about how often with new pilot programs, we do focus groups with participants and I think it is so crucial that after you've done focus groups, to be able to share with participants what changed in the program based on their feedback, and so the same thing with staff. How has their experience with it and them being willing to do this process with you, how has that changed the way that programming is moving forward?

And then with the goal setting that we talked about earlier, there's an accountability and follow up to that as well. Is there a goal that they've been working on? So let's say a staff person was a really eager sharer of resources and enjoyed sharing the ways problems could get solved, and that something you're working on together is how to take a step back and have that staff person ask maybe a couple of questions to the participant about how they might solve the problem, and over time, you're noticing through your observations that they've really done an excellent job of incorporating that feedback and eliciting more expertise from the participant themselves. And so how do you recognize the fact that they worked on that goal and that they completed that goal? So you know, it could be a card, like, "Woohoo - you did it!" or a way of just saying, maybe a certificate system. It's really up to you about how you think about acknowledging the work that they've done and then supporting their next, continuously wanting to learn, so what is the next thing they want to work on to be a better coach?

And if you… so Diana's position is unique in that she's not a supervisor, but she makes it really clear to them from the beginning how frequently they are going to be meeting and at what intervals they're going to meet, and we would recommend if you can do that as supervisors as well, that would be great. So are you going to bring up this observation tool monthly, quarterly, how is that going to be pulled into your regular supervision time? The other thing we've been talking a lot about: one-on-ones, but could you think about using this as a group? So with your entire team, maybe there's a pair-and-share opportunity, or you could have buddy systems within your staff about how to continue to support each other on their learning goals, because I do recognize that your time is limited, and so how can you think about using this learning process and this observation tool without overburdening your supervisors or your specific time in making this happen? So lots of creative options to help you create a process where you have an observation tool.

So with that, I'm really excited, because our colleague Jen is going to join us in just a moment, and she was in South Dakota for one of the many coaching trainings. And while on one of those visits, she was able to use the coaching observation tool, and so she's going to share a message from the field about how that went and what you might glean from that process as you think about this in your space. Jen?

JEN LOWE: Thanks, Stephanie, I appreciate that. Diana and I did a presto-chango facilitator. And I'm really excited to share a little bit about my observation of coaching practices in South Dakota but before I did, I just wanted to provide a little bit of context. Last year, as part of the IIEESS project, I had the opportunity to watch the team, and that's really where we officially highlighted, externally highlighted the coaching observation tool. So I thought it might be helpful just to share that experience, and then share about South Dakota.

So with Washington, D.C., prior to starting the IIEESS project, a lot of the staff had already received some coaching training, they had done a lot of motivational interviewing training. So when they started with the IIEESS project, they were already a little bit ahead in their coaching practices. They already had a good foundation to begin with, and so one of the site visits they invited us for was to do coaching observation. They wanted us to jump in and do some observations of the team. And these were primarily in office observations. I was joined by Azaliah from Public Strategies. We both went out to Washington, D.C. And it was a joint in-office and in-the-field observation. But I'm going to speak to the in-office observations that I was able to do.

So in-office, we worked with staff, we shadowed them quietly in the office as they were meeting, primarily doing goal-setting conversations or goal-setting meetings with customers. And because it was in-office, it really allowed me to quietly take notes in the corner. I think Diana had also mentioned at some point when she was doing observations with staff, that staff tended to forget that she was there, and I hope that was the situation when I was in D.C. I think I positioned myself in the meetings to be as unobtrusive as possible. And so after each of those in-office observations, the staff member and I would do a short debrief, maybe about 10 or 15 minutes, to allow them to reflect on their experiences, and to allow me to provide that feedback so that we had a good sense of where each other was coming from. I would think it would feel difficult if you never got that feedback or response from people, so always making sure that you're sharing what your feedback is or sharing what your observations were and allowing staff to be able to share back as well.

And so we ended up coming back with Stephanie. Stephanie and I went back and did a more advanced coaching, because I think what we realized doing the observation is that they had a really great foundation, so it allowed the opportunity for us to brainstorm with the team and think about what would be the next best professional development opportunity, and that was more advanced coaching. And so Stephanie and I went back and did that. And so now to my example from South Dakota. An incredible team out there. They had done a training as part of the IIEESS project. In the fall we did a coaching training with them. And so they’ve just started implementing coaching practices within their work. They're piloting in two offices right now, I believe Pine Ridge and Mission. And they'd been at it for about three months before they invited us back out to do another site visit for coaching observation. And so this site visit was a little different. It was going to be site visits that were primarily in the field. So Claudia came from Public Strategies and I. We were able to go out and meet with staff. Even before we went out into the field we met as a group and then went out into the field to do some observations.

But let me back up a second, because I think planning was a big part of this. We wanted to make sure that in our planning process, we were raising, I think, some of the concerns that Diana had mentioned earlier of, will staff feel apprehensive about Claudia and I, who aren't part of the team, coming in and observing them and shadowing them in their practices? And the response that we got was actually no, management does this anyway. Staff are used to management going out and doing observations, and so this would feel like a natural part of the work. It's something they've already been doing, which was really helpful, I think, for Claudia and I to hear, and it took away some of our concerns and apprehensions about observing.

So we went out into the field with some incredible staff, and as you can imagine using the tool in the field is a little trickier, a little more challenging than using the tool in an office-based setting. And so what I found was that in the field, because we were visiting people at work sites all over a couple of different towns we were working in, it was a bit challenging to actually take out the observation tool and write notes because we were doing site observations, working at either juvenile detention centers or elder food services, and so it was hard to, logistically use the tool.

But the tool was incredibly helpful for both Claudia and I to just become familiar with it, to become familiar with the structure, so that post observation, we were able to make our notes, make notations, whether it was in the car or afterward, be able to put in our notes and comments and feedback into the structure, into the tool. And so that for us provided a nice way to then debrief with the group, the entire team on both days. We were there for two days doing observations. It allowed us to debrief with the group, to hear what their reactions were, to hear what our feedback was, and to really brainstorm as an entire team where they would like some more professional development opportunities, where we thought they were doing really great work, and we even only in the three months that we were piloting, there was so much… it was so great to see what they were doing. But it allowed us the opportunity to share and think about what the next steps could possibly be. Yeah, so that was my observation of using an earlier iteration of the tool in Washington, and then a later iteration of the tool, the tool that you'll be getting today, with South Dakota.

STEPHANIE: I was on mute. Anyway, I was just saying thank you, Jen. That was helpful to hear it from another context. So we left the end here for questions and comments, and I saw one come in, and the question being, "Could coaches videotape themselves in practice and then use it as a self-assessment tool?", which is interesting. At first, when I read the concept of videotaping, it was before I saw it as a self-assessment. So we had thought… we had talked about potentially videotaping or using an audio recording, and staff actually were less comfortable with that option. They worried about that more, and so because it was a pilot, we would rather take the path that felt most collaboratively aligned, so what the staff felt most comfortable with and so that we could also engage in an observation culture, so we went with in-person. But from a capacity standpoint, I can understand where that question might be coming from. I think the other thing is to think about getting permission from participants, whether they're okay with being video recorded or audio recorded.

And then in terms of using it as a self-assessment, I think that's super fascinating, whether staff would engage in that process, maybe as a team without a supervisor? So I like that, because it takes the power dynamic out of it, although we hope that supervision doesn't feel power-dynamic-y, but you know, at the end of the day we do supervise our staff. So I think that's a really interesting one to explore, and I appreciate that idea. So sometimes agencies have staff groups, like they call it “group supervision” or “peer support,” so that could be a space where people use that. I've seen people use that space to do goal-setting practice, so they'll write a goal that they've done with a participant, and then they all together talk about how the goal could be SMARTer, because every goal could be better, honestly. And so I could see it being a similar approach, which is really interesting. Yeah. Jen, did you have something to add? I saw you nodding.

JEN: No. Just that I am agreeing with everything you're saying. Great feedback.

STEPHANIE: Yeah, really interesting. So thank you for that question. And so I think in light of that question, the kind of take-home message from this is that this is something we are piloting at EMPath. We're definitely in the first year of stages, so there are things we definitely still need to learn. It's also how we're able to do it based on our setup, and so what we invite people to do is to take the tool and make it their own and use it in the way that is most impactful for the way you do your program flow and supervision. So it's kind of a starting off point. Other questions?

JEN: (Laughs)

STEPHANIE: Did you hear the kids in the background?

JEN: Yes, they have questions.

STEPHANIE: Always. Okay. A question came in as to whether we found a 24-hour delayed response for observation feedback to be the most efficient timeframe. Interesting question. I don't know if we tested, you know, 24 hours vs. right after to be able to say which is better. I think I could see it play out two different ways. When I think about the staff that I've worked with, I think that some of them might sit in some anxiety if I didn't follow up with them right after, and I wouldn't want them to worry about it. Because even if I upfront say, "This is about us collaboratively thinking about how to support you and I want to be here to help you become the coach that you want to be," I think I also need to prove that a bit. And so if you're able to spend at least a couple of minutes, if your time is tight, after to just particularly call out what they did well, I wouldn't want staff to go home anxiously sleeping on it, so I appreciate that question.

And it might be a little much to do a full hour debrief right after they've done a meeting. So I think it's a bit of a balance. So if there's a way for you to provide some immediate, "Hey, thank you so much for letting me observe you. You clearly care about this participant's well-being and it is so evident based on the way that you have built that relationship. I look forward to talking with you more tomorrow. I hope you have a good night." However you want to frame it. So I think that's a really thoughtful way of getting at that. Thank you for that question. Any other questions?

I think those are good questions to start with. I'm trying to think—Jen, did anything come up for you? Or any other popular questions when you were doing it in South Dakota or D.C.?

JEN: No, no. The only thing that I'm reflecting on right now is because I wasn't a direct supervisor of the folks that I observed, and because we only had limited time while we were there, if that experience is going to look much different than the experience of supervisors who get to work with staff ongoing. And so our experience coming in for a day or two days and quickly having to debrief and think about next steps and professional development opportunities is going to be very different.

STEPHANIE: Very different. Yeah, I mean, it's hard to have continuous goal orientation if you're coming in for a couple of days and then leaving, right? Yeah. So I think what you're bringing up is that consistency and the importance of the one-on-one relationship or the group relationship that you're creating through the use of the tool.

JEN: Right, right. So it isn't just us coming in and leaving, but maybe us coming in, sharing the tool, and having the tool be used in an ongoing way.

STEPHANIE: Yeah. And I think, while I'm talking about piloting, I'm not sure if we made this clear. Sometimes when we operate in our spaces, we forget that other people are not in our spaces, so they don't know what we've done. But what Diana did is she started working with one team only, and piloting it and getting feedback from them, and then moving to other teams and taking on the feedback and incorporating it as she went. So as all pilots go, always, I think it's great to start with a small team. You all have identified champions of coaching within your states, who have been able to spread the coaching ethos across the state. And so maybe starting with your enthusiastic supporters to help get some feedback in terms of what they think their peers might feel about the tool, what questions feel like they align with the way that they do their work, where there might be some hiccups. I think sometimes we are removed unintentionally, and so it can be really helpful to solicit that kind of feedback and be really intentional about how this can be the most impactful for the people that you're trying to make it impactful for. So that's the other piece I want to make sure we're clear on.

I'm not seeing any other questions, which is okay. And I am in no need to keep you all here until 3:30 just because that's what we have to do. But what we do have for the next few minutes is Tina's going to do her magic and upload the tool for you to be able to download, and it's going to pop up when you're also… Oh, one more question. So Tina's going to pop up the observation tool, you're going to be able to download it, and then there's also going to be a survey, just to give a quick participation feedback. So if you could please fill that out, and then you can get your downloaded copy.

So the question that came in was: "Does your evaluative format utilize observation? So after one year of implementation, would the format be similar to the one they have seen previously?" Oh, I see, So, I think I see. Um. One moment, I'm digesting this. Okay. If I understand this correctly, so we… the coaching observation tool, the general format should be… we do keep it the same. The only thing that we've changed is like a few wording, or we noticed things that were repetitive on there. And in terms of—oh, and there it pops up—and in terms of wanting to make sure that staff are familiar with it when they review it, yeah, you want to keep it consistent enough so that it's not a new tool every time. I agree with that concept. I do think that if things have changed on the tool, it's cool to share, because the reason it's changed is because you've gotten feedback from their peers. And so you're saying you've listened to their feedback, and this is what you're doing with it. So I think changes are okay to do.

I do also want to be clear: The way the question is worded was asking about evaluations, and this coaching tool doesn't get entered into our HR system at all. So we have a separate annual review process here at EMPath, and the coaching observation tool is totally separate. It's like a… think of it as a professional development path for us. But yeah.

TINA: I have the observation tool open for those who would like to download it for themselves. I will leave it up as you get this done. Just highlight over the file and right-click to download. Also, we will have our final webinar on August the 8th, so be available for that. Also, I was wanting to let you know that this PDF is 508 compliant, so you should be good to go.

STEPHANIE: Awesome. Thank you for making sure that it was compliant, too. So again, please, I hope you can take from the tool what is helpful to you. If you're willing to share with us what you've done to change it, we're always happy to hear your ideas because we learn from you, too, so we appreciate that. That is it for our part. So really, just thank you for participating and for your questions. This will be… I think the survey is going to pop up as soon as you close out the webinar. It's going to be some automatic thing, hard to avoid.

TINA: Correct.

STEPHANIE: Yes, thanks, Tina. And then that'll be it. So I'll stay on here for another couple minutes, just in case we have some final questions. But with that, the webinar content part is concluded. So thank you very much.

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