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Lex Frieden

TIRR THE INSTITUTE FOR REHABILITATION AND RESEARCH
in the Texas Medical Center / 1333 Moursund Avenue / Houston, Texas 77030 / (713) 797-1440

M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Date: January 20, 1982

Re: Session 12 - Coping with Difficult People

Enclosed is the material describing the twelfth session of Supervisory Skills - Coping with Difficult People. It would be helpful if you could read this before your session on February 3, 1982. The cover information describes what we will be doing during the session as well as what your "homework" assignment will be.

Please remember that this session is a 6 hour session and will last from 1:00 p.m. until 7:30 p.m. Please make appropriate arrangements with your departments, your families, and your transportation so that you will not be disturbed during this time.

Also, remember to bring your completed 3x5 index cards from session #11.

A voluntary, not-for-profit hospital for restorative medicine serving the disabled through care, research and education.

Services Offered: Early restorative medical care, comprehensive rehabilitation, surgical restoration, diagnostic evaluation and planning, independent living services, vocational evaluation, training, placement, sheltered employment.

Topic: Coping with Difficult People

Description: This session is designed to assist participants in identifying:

a. disruptive employees;
b. strategies for handling difficult people; and
c. tactics for dealing with poor performance.

Rationale: Managing people is always challenging, but never as challenging as when an employee demonstrates particularly disruptive behavior. There are basically six types of difficult employees: complainer, indecisive, hostile, the "expert", unresponsive/passive and over-agreeable. This session provides the framework for understanding these issues and the time for practicing the strategies for both preventing and coping with disruptive behaviors.

Performance Objectives: Upon completion of the session, participants will be able to:

- Apply appropriate coping strategies for handling either an indecisive or complainer colleague
- Negotiate behavorial contracts with personnel
- Apply appropriate coping strategies to handle hostile employees

Advance Organizer for Presentation:

1. Discuss the six parts of the personality, (TA)
2. Analysis of six types of difficult employees
3. Strategies for directing emotional energy for positive results
4. Methods for coping with the six types of difficult employees
5. Situations that produce problem employees
6. Preventing employees from developing problem behaviors

Instructional Method:

1. Lecture/discussion
2. Role playing
3. Small group activities

Learning Activities:

1. Complete and discuss an Employee Planning Inventory
2. Develop a behavior contract
3. Role play handling a hostile employee

Between Session Assignment:

1. Use different part of your personality when interacting with a difficult person to obtain a different reaction from them.

2. Develop a behavioral contract with a difficult employee to obtain improved behavior.

3. Follow the strategy in approaching one of the six difficult types of people.

SIX DIFFERENT PARTS OF THE PERSONALITY

CRITICAL PARENT -	protective, rules, procedures, regulations, values
NURTURING PARENT -	supportive, warm, helping others
ADULT -	computer-like, information, facts, figures (no emotions)
FREE CHILD -	creative, fun, playful
COMPLIANT CHILD -	adapts to other's expectations, pleases others
REBEL CHILD -	gets back at others, "I'll show you"

STEPS IN HANDLING EMPLOYEE COMPLAINTS

1. Be courteous. The way employees are treated while complaining effects their attitude. For example, making notes indicates the complaint is being taken seriously. After hearing the complaint, repeat the main elements to assure full understanding. Thank the worker for bringing the matter to your attention and set a date when a decision can be expected.

2. Gather information. Examine the complaining employee's record (absenteeism, productivity, job performance rating). Find out if the worker is a chronic complainer. Review precedents and higher management opinions. Try to resolve the complaint based on the employee's overall job record.

3. Take appropriate action. If the complaint is based on something that cannot be changed, explain why. If the complaint is unjustified, be firm and calm in telling the employee so.

4. Follow-up. Complaints often turn up changes that are needed to improve overall efficiency, cost-containment and motivation. Make those changes.

HANDLING COMPLAINTS BY PROFESSIONAL WORKERS

All of the steps listed above in handling employee complaints are useful. Conflicts between management and laboratory technologists, respiratory therapists, nurses, computer specialists and others are rising. Problem: a significant number of professionals seek outside legal advice if terminated.

RECOMMENDED ACTIONS:

1. Avoid elaborate disciplinary procedures--take a counseling approach instead.

2. Get the professional to acknowledge there is a problem and commit him/her to solving it. Have him/her put the plan in writing. At the very least this establishes a legal defense for the organization.

3. Set up an appeal mechanism through which the professional can complain about unfair supervisors.

-- AN ORGANIZATION WIDE GRIEVANCE MECHANISM THAT IS OPERATED IN GOOD FAITH REDUCES CHANCES OF ADVERSE COURT FINDINGS ALMOST TO ZERO. --

GUIDELINES FOR EMPLOYEE PROBLEM PLANNING

1. What tells you that there is a problem?

2. What are the consequences (i.e. in time, money, employee safety, patient or client relations, image projected about yourself or your unit, etc.)?

3. How much of the present state of affairs can be attributed to a negative interaction involving the employee?

Points to think about:

* Was the employee ever productive or effective?

* Did the employee's performance change for the worse abruptly?

* Is the level of your annoyance or irritation higher than seems appropriate? (check this out with other people)

4. Can you identify anything which may have threatened or stressed you and/or the employee?

5. What kind of problem is it? Is the job too much for the employee? Is the problem the result of perceived threat or stress? Does the problem arise from abiguity about performance standards?

6. Who are the principal people involved? Are any of them distressed by the situation?

7. What have you done in the past to correct the situation? What have the others who are distressed by the situation done to correct it?

8. What seemed to work, even if only temporarily?

9. What action steps appear to hold promise for improving the situation?

   * Will action strengthen positive behaviors?

   * Will action minimize resistence behaviors?

10. Who needs to be involved in your plan?

11. Action steps:

   * What is the first step?

   * When and where will you do it?

   * Follow-up

HOW TO VALUE OTHERS

1. Pay attention and really listen to others: the information they give and the feelings they express.

2. Avoid making assumptions about how others think or feel, or how they will react in any given situation. You can't read their mind and crystal-ball gazing is for gypsies.

3. Don't be destructively generous. Others want to be responsible for themselves. Let them do so. Avoid "parenting" your staff.

4. Sarcasm and teasing are dirty fighting.

5. Do disagree with or confront unrealistic or manipulative behavior. But avoid attacking others as people.

6. Be honest, direct, spontaneous, open and specific. Don't participate in manipulative games. Avoid mind raping - correcting other's statements about how they feel or think. Don't tell them how they should feel or think.

7. Avoid labeling others--as lazy, childish, dumb, uncooperative. Don't make sweeping judgments about feelings, especially about whether the feelings are real or important or morally right or wrong.

8. Use questions very selectively. They are a demanding, controlling form of communication, especially the "why and why not" questions which generally imply your disapproval.

9. When you have differences be willing to negotiate and work out contracts.

GUIDELINES FOR CONTRACTING

1. Define the expected actions. Use behavioral or action terms. Avoid using terms that specify personality traits.

2. Clarify the when, how, where, how much, how long, etc.

3. Negotiate any differences. Obtain agreement.

4. Check the match or agreement between you and the other person by restating the terms of the agreement (using different words), and asking the other person if he or she agrees. When agreement is obtained, ask them to specify how they will go about the task.

CONTRACTING EXERCISE

Rewrite the following sentences into specific requests that include how, where, when, etc.; that is, make the contract clear, specific and unambiguous to both parties involved.

1. Can you get me that information?

2. Why don't you give me a hand with this paperwork?

3. Why don't you do something about training, Bob?

4. How would you like to help me with this project?

5. Can you see me some time next week?

6. Let's speak to Aiken about this plan.

7. Will you send that information out as soon as possible?

8. We ought to set some goals for next year.

GOAL SETTING

State goals in behavioral terms. This commits the individual to action. To be achievable a goal needs to be stated in action terms--something that can be done, measured, seen, etc. When goals are vague or fuzzy they cannot be acted upon. No one knows for sure what to do or how to do it.

FUZZIES	ACTION TERMS
I want to know more about cost containment and its relation to budgeting.	
I want to have positive relations with my subordinates.	
I want to be the best management person in my organization.	
I will increase my awareness of my staff's needs.	

MANAGERS AS COACHES

The most common managerial mistake is assuming the employees know:

1. what's expected of them--standards of performance,
2. how well they're doing, and
3. how to improve their performance.

REALITY: Few organizations have precise standards of performance.

RESULT: The individual manager must take the initiative for improving employee job understanding, performance and productivity.

DEVELOPING THROUGH COACHING:

1. Help the employee recognize the need for change. Discuss why it is in the employee's best interest to change in terms that are meaningful to the employee (not necessarily meaningful to the manager.) People change only when they see a benefit to themselves personally.

2. Identify specific measurable objectives. Work up with employees specific performance standards and scales against which both the manager and employees can measure employee performance.

3. Get the employee to write down goals or objectives and the action steps s/he will take to reach those goals. Both the manager and the employee sign the action plan.

4. Evaluate the action plan with the employee--discuss alternative ways to reach goals and decide jointly on the best approach. Two way communication is essential here. Revise the action plan jointly and sign it again.

5. Recognize and reward any achievement (no matter how small) while the employee is working on the problem areas. Keep checking on how the employee is progressing toward the goal. Is the timing being met? Or does a revision need to be made due to unanticipated circumstances? Be very supportive as the employee strives to reach his/her goals. COACH!

6. The manager solicits feedback from the employee. Consider using a survey that can be answered anonymously. Ask questions such as: 1) How many times were you coached? 2) Did your manager involve you actively in the discussion? 3) Did you feel free to ask questions and make suggestions? 4) Do you have a sense of achievement or of contribution?

COACHING IS AN ON-GOING PROCESS. A NEW CYCLE IS BEGUN AS SOON AS ONE IS COMPLETED.

MANAGING THE ABRASIVE EMPLOYEE

1. When the abrasive employee disrupts the unit, department or group, talk it over with him/her privately and quietly, keeping in mind that his/her abrasiveness may stem from vulnerability and/or drive for perfection.

2. Report observations of behavior uncritically in these discussions. Ask what s/he thought others felt about what s/he did or said. Also ask if that's the result s/he wanted. Ask, too, how s/he might get the desired response. Describe to him/her how people actually did react.

3. Point out that in order to reach goals, s/he must improve his/her relationships and that management is willing to help. Stress his/her value to the organization and his/her need to change.

4. Avoid impulsive attack, but let the employee know that his/her behavior is annoying.

5. Never counterattack (when s/he becomes defensive), merely state observations of his/her behavior. Stress the value of compromise and the impracticality of the all-or-nothing stance.

6. IMPORTANT: Don't assume s/he is aware of her/his problem. Tell the employee in writing if necessary, what will happen if s/he doesn't change.

WHAT BLIND OBEDIANCE COSTS THE ORGANIZATION:

Organizations that discourage dissent and encourage people to keep complaints to themselves run these risks:

1. High Turnover--inspired by feelings of being ineffectual or pent up frustration;

2. Waste or minor theft--Constant pilferage and allowing equipment to deteriorate;

3. Sabotage--intentional destruction of equipment or records;

4. Inferior performance and poor work; and

5. Increased Absenteeism--often the result of legitimate, chronic illnesses (such as hypertension, coronary disease, intestinal disorders) that are aggravated by the emotional stress of repressed anger and on-the-job dissatisfaction.

WHAT TO DOCUMENT

_____ 1. Were pertinent manuals and other written materials provided in a timely fashion?

_____ 2. Was a formal orientation to the job and unit provided?

_____ 3. Was on-the-job training provided?

_____ 4. Were performance standards established?

_____ 5. Were performance standards discussed with the employee?

_____ 6. Were discrepencies between performance standards and employee performance stated directly to employee?

_____ 7. Were improvement goals explicitly stated to employee?

_____ 8. Was remedial help provided (coaching/couseling, training, etc.)?

_____ 9. Was progress noted and discussed with employee?

_____ 10. Was employee given supervisor's plan of action?

_____ 11. Was there a review of performance discrepency and lack of progress?

GROUP TASK ROLES

Initiator - Contributor
Information Seeker
Opinion Seeker
Information Giver
Opinion Giver
Elaborator
Coordinator

Role related to task the group has undertaken. Purpose: to facilitate and coordinate group efforts in accomplishing the task.

GROUP BUILDING AND MAINTENANCE ROLES

Encourager
Harmonizer
Compromiser
Gate Keeper and Expediter
Follower

Roles oriented toward the functioning of a group as a group. Purpose: to alter or maintain the group, to strengthen and regulate the group.

INDIVIDUAL ROLES

Aggressor
Blocker
Recognition Seeker
Self-Confessor
Playboy
Dominator
Help Seeker
Special Interest and Pleader

Role which satisfies participant's individual needs. Purpose: to achieve some individual goal which is not relevant to the group task or to the functioning of the group as a group.

My personal goals for using the information presented on the topic of Coping with Difficult People are:

1.

2.

3.

Signed: _____

DIRECTIONS: Circle the appropriate number, or fill in the information requested.

1. This workshop met my needs:

   1 Not at all

   2 Somewhat

   3 Average

   4 Well

   5 Very Well

2. I found the following topic or activity to be the most valuable:

   _____

   _____

3. I found the following topic or activity to be the least valuable:

   _____

   _____

   What recommendations would you make to improve the topic or activity you described as least valuable?

   _____

   _____

4. What is your reaction to the training materials?

   1 I'll share this with other staff.

   2 This is good resource material and may work.

   3 I'm not sure how helpful this will be, and don't know if I will use it.

   4 I'll never use this information.

   General comments about training materials: _____

   _____

   _____

5. What types or styles of training methods did you find most useful during this training? (Check only two)

1	Lecture	5	Panel presentation
2	Small Groups	6	Question and answer period
3	Large groups	7	Simulation experience
4	Role playing	8	Inventories

Comments _____

_____

6. Has your knowledge of the training topic(s) increased as a result of your participation in this workshop?

1 Yes

2 No

3 Undecided

7. Will your job performance change in any way as a result of this training experience?

1 Yes

2 No

3 Somewhat

8. Indicate how you think your job performance will change as a result of this training program:

_____

_____

_____

9. Please rate how well you feel the following objectives were accomplished:

A Apply appropriate coping strategies for handling either an indecisive or complaining colleague:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

B Negotiate behavioral contracts with personnel:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

C Apply appropriate coping strategies for handling hostile employees:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

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M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Re: Session #8 - Motivating, Managing and Developing People

Date: September 23, 1981

Enclosed is the material describing the eighth session of Supervisory Skills - Motivating, Managing and Developing People. It would be helpful if you could read this before your session on October 7, 1981. The cover information describes what we will be doing during the session as well as what your "homework" assignment will be.

Please remember that this session is a 6 hour session and will last from 1:00 p.m. until 7:30 p.m. Please make appropriate arrangements with your departments, your families, and your transportation so that you will not be disturbed during this time.

Also, remember to bring your completed 3x5 index cards from session #7.

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SEATING ARRANGEMENTS FOR THE EIGHTH SESSION - MOTIVATING, MANAGING AND DEVELOPING PEOPLE

Table 1

1. Linda Collins
2. Dorothy Barker
3. Ruby Banks
4. Mildred Johnson
5. Ann Gutierrez
6. Mary Sawyer
7. Jean Johnston

Table 2

1. Geneva Johnson
2. Judy Findlay
3. Jean Cole
4. Carlos Guillory
5. Diane Clark
6. Sandra Pugh
7. Cindy Monroe

Table 3

1. Roxan Ballweber
2. Milli Patti
3. Jane Fisher
4. Marci Rowland
5. Betty Olsen
6. Carnel Roco
7. Lillian Thomas

Table 4

1. Relia Scott
2. Drucie Bohlen
3. Rick Keniston
4. Gordon Stanley
5. Marilyn Lockett
6. Karen Zinzer
7. Kristy Davidson

Table 5

1. Laverne Hurston
2. Mary Moore
3. Effie LaMothe
4. Lida Dahm
5. Lourdes Cuellar
6. Dorit Hanover

Table 6

1. Saramma Ninan
2. Gerda Baker
3. Betty Wall
4. Laura Campion
5. Gloria Tavis
6. Mildred Branner
7. Ed Summers

Table 7

1. Johnnie Mitchell
2. Diana Bertrand
3. Peggy Kanellos
4. Carol Campbell
5. Linda Brightman
6. Harlan Brown

Table 8

1. Ruby Davis
2. Betsy Martin
3. Lex Frieden
4. John Fletcher
5. Carol Stillman
6. Marcia Sanderson
7. John Lagunas

Topic: Motivating, Managing and Developing People

Description: This session is designed to assist participants in:

1. Creating a climate for high performance among staff;
2. Maximizing "people" performance;
3. Recognizing and treating career burn out;and
4. Developing and maintaining career direction.

Rationale: In almost every organization today, and especially at TIRR, the future can be greatly enhanced by the supervisor's ability to motivate his staff to become highly productive workers. Assisting staff in identifying and meeting career objectives and providing personal and professional growth opportunities is one of the most useful ways to achieve increased performance. Another important factor in maximizing performance is the supervisor's ability to 1) recognize staff members who are experiencing career burn out, 2) diagnose the severity of the burn out, and 3) apply the appropriate technique for resolving the issue. This course provides a conceptual framework for clarifying and understanding these issues, and is structured to allow participants to practise the techniques suggested.

Performance Objectives: Upon completion of the session, participants will be able to:

- Identify short and long range environmental factors that may influence job performance
- Identify three growth tracks for increasing staff potential and develop an action plan for implementing growth tracks
- Identify three stages of career burn out and apply preventive and/or treatment strategies for each stage

Advance Organizer for Presentation:

1. Discovering an employee's needs for career growth
2. Assisting an employee in meeting his career needs
3. Concepts involved in employee contracting
4. Recognizing, preventing and/or treating career burn out
5. Designing a career development plan
6. Concepts of life/work planning

Instructional Methods:

1. Lecture/discussion
2. Small group activities

Learning Activities:

1. Discuss questions which may be useful in determining how to develop abilities and work effectively with an employee.
2. Complete a personal needs inventory.
3. Complete a burn out questionnaire.
4. Discuss statements an individual may make that indicate which of the three stages of burn out s/he is in.
5. Discuss life/work planning questions.

Between Session Assignment: Before the next session complete at least one of the following tasks and record your results on a 3x5 index card.

1. Have each employee complete the personal needs inventory and develop a plan for utilizing his/her strengths on the job.
2. Discuss growth tracks with each employee (including administrative, educational and technical tracks).
3. Have each employee complete a burn out questionnaire to determine proneness to burn out.

PROBLEM ORIENTED JOB SPECIFICATION:

1. Key problems that require a replacement or additional persons

   Key short range problems:

   Key long range problems:

2. What end result do I want to achieve by investing in this person?

3. How will I measure the return on the investment in this person?

4. To achieve results what will the person have to do in the following areas of responsibility?

   People/client/patient/relationships:

   Supervision of others:

   Relationships with other departments:

   Miscellaneous, significant responsibilities:

5. What experience would be relevant and helpful in solving the KEY problems of the job?

6. What special abilities are necessary to solve the KEY problems of the job?

7. What growth can the person achieve by solving the KEY problems of the job?

USEFUL QUESTIONS

The following are useful questions to ask the new employee or the job applicant to get an in-depth feel for the person and ideas about motivation and growth directions that would be appropriate for the individual within your department or unit.

1. In your previous job, what were your main tasks? Why did you put them in that order? Approximately how much time did you need for each of those tasks?

2. What have you found to be the most interesting and satisfying in your previous jobs? the least satisfying?

3. What special problems arise in your job? Which ones concern you the most? How do you approach them?

4. How has your job changed since you've held it? What part did you play in the change? What evidence of your work do you see remaining after you left the job? Were these results planned or did they simply follow from your work?

5. Of all of your previous supervisors or bosses, how would you describe your favorite one? your least favorite one?

6. What do you ideally see yourself contributing to this organization and this department?

PERSONAL NEEDS INVENTORY

CLUSTER I: _____	LOW NEED		SOME NEED		HIGH NEED	
I like to do difficult things.	1	2	3	4	5	
I need a job that challenges me.	1	2	3	4	5	
I get real satisfaction out of mastering something hard.	1	2	3	4	5	
I'm not afraid to take risks when I'm in control.	1	2	3	4	5	
If I put my time and money on something, I want to have a say in its outcome.	1	2	3	4	5	
I want to know how I'm doing. If I make a mistake, I want to know about it.	1	2	3	4	5	
When I do something right, I need to learn about it.	1	2	3	4	5	TOTAL=_____

CLUSTER II: _____	LOW NEED		SOME NEED		HIGH NEED	
I have to work with people, I couldn't work alone.	1	2	3	4	5	
I need a lot of friendly people around me to be able to get my job done.	1	2	3	4	5	
It's important to me to be liked.	1	2	3	4	5	
I believe in expressing positive feelings toward others.	1	2	3	4	5	
I like to know how other people feel about things.	1	2	3	4	5	
I enjoy helping others.	1	2	3	4	5	
When someone has a problem, I like to be the one they seek for advice.	1	2	3	4	5	TOTAL=_____

CLUSTER III: _____

	LOW NEED			SOME NEED	HIGH NEED
I've got to be my own boss.	1	2	3	4	5
I like to tell people what to do (give orders).	1	2	3	4	5
I stick up for what I believe, no matter what anyone else thinks.	1	2	3	4	5
If my opinions cause an argument now and then -- well, I don't mind.	1	2	3	4	5
I like to focus on getting the job done, not on discussing feelings.	1	2	3	4	5
I've got responsibility, and I'll make decisions, no matter whose toes get stepped on.	1	2	3	4	5
I enjoy making decisions.	1	2	3	4	5

TOTAL=_____

BEING A MENTOR:

Being a Mentor involves:

1. A mutual agreement based on genuine personal affinity to engage in a teacher-subordinate relationship;

2. An ability to structure learning situations that suit the particular needs of the subordinate and will help build self-confidence and skills;

3. Daily informal contact and instructional dialog; and

4. A willingness to be open with information received from above--first to prepare the subordinate for the next career step and to encourage the subordinate to be open about problems.

DAY-TO-DAY EXPERIENCES FOR EMPLOYEE GROWTH/LEARNING

Assignments:

Breadth & depth of assignments

Types of assignments

Special project assignments

Variety in assignments

Mobility assignments between departments/units

Responsibilities:

Scope of responsibilities

Ability to undertake supervisory responsibilities

Planning responsibilities

Technical Knowledge:

Exposure in some depth with some hands-on experience to newest techniques and technology in the field

Exposure in some depth with some hands-on experience to newest techniques and technology in an allied field or related field

Exposure in some depth with some hands-on experience to potential areas of responsibility (marketing services, lobbying, computer technology, etc.)

Educational Advancement:

New knowledge acquired through education, training, seminars, conferences

Exposure to public and community activities

Speaking and writing opportunities (professional meetings)

Organizational Opportunities:

Opportunities to serve on and lead inter- and intra-departmental committees or task forces

Industry-wide and inter-organizaiton activities, committees and task forces

Opportunities for short or long term travel or relocation (setting up formal or informal relationships with another hospital or health care agency)

HOW TO VALUE OTHERS

1. Pay attention and really listen to others: the information they give and the feelings they express.

2. Avoid making assumptions about how others think or feel, or how they will react in any given situation. You can't read their mind and crystal-ball gazing is for gypsies.

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2. Why don't you give me a hand with this paperwork?

3. Why don't you do something about training, Bob?

4. How would you like to help me with this project?

5. Can you see me some time next week?

6. Let's speak to Aiken about this plan.

7. Will you send that information out as soon as possible?

8. We ought to set some goals for next year.

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FUZZIES	ACTION TERMS
I want to know more about cost containment and its relation to budgeting.	
I want to have positive relations with my subordinates.	
I want to be the best management person in my organization.	
I will increase my awareness of my staff's needs.	

QUESTIONNAIRE

____ 1. There is little variety or change in my work.

____ 2. I seldom find what I am doing to be challenging or demanding.

____ 3. My present position does not use my potential.

____ 4. There is a lot of time to socialize with others in my work area.

____ 5. I often feel bored with the work I'm doing.

____ 6. I frequently feel apathetic and lethargic.

____ 7. Lately I have to push myself to get things done.

____ 8. My job seldom requires initiative or responsibility.

____ 9. Basically my work has become very routine.

____ 10. I seldom look forward to going to work.

____ 11. I nearly always have a high energy level.

____ 12. I look forward to getting vigorous physical exercise several times a week.

____ 13. I am a career person and describe myself that way.

____ 14. I have a generally high level of enthusiasm.

____ 15. I put approximately equal energy into my work and personal life.

____ 16. I am proud of myself and have high self esteem.

____ 17. I feel I have a commitment to myself to enjoy life.

____ 18. I often feel excited about new ideas and learning new things.

____ 19. I frequently take relaxation breaks and find it easy to unwind.

____ 20. I have made a commitment to myself to maintain a high level of mental and physical health (ideal weight, non-smoker, etc.).

____ 21. I do not work well under pressure.

____ 22. When possible I delay or avoid making decisions.

QUESTIONS ON LIFE/WORK PLANNING

1. List peak experiences you've had.

2. List things you do uncommonly well.

3. List things you do poorly.

4. List things you'd like to stop doing.

5. List things you'd like to do well.

6. List peak experiences you'd like to have.

7. List things you'd like to start doing now.

8. List values that you'd like to actualize.

CAREER STATEMENTS

1. Good things come to those who work long, hard hours.

2. Good things come to those who perform well.

3. Growth in a career is a function of the kind of a boss that you have.

4. If you want to achieve, you must know your weakness and how to overcome it.

5. Whatever you do, you should do your best.

6. Doing something is better than doing nothing.

7. It pays to have work life and personal life separated.

8. I know that I'm succeeding because I've just been promoted.

9. Life would be much better in another organization.

10. If I strive for perfection, I will be promoted.

ELEMENTS OF PERSONAL LIFE/WORK PLAN:

1. Future focused role image.

2. Flexible life work plan.

3. Define what are the necessary skills and knowledge of the people who are there now and build these into your continuing education plan.

4. Alter self image and world view.

5. Stage your skills.

6. Deliberately aquire a power base within your organization.

7. Increase the amount of energy you have.

8. Learn stress management.

9. Develop your right hemisphere if you are currently a left hemisphere thinker.

10. Develop the ability to envision different realities.

11. Go into frontier areas of your profession and develop there.

12. Master the techniques of organizational and community changes.

13. Traits are changeable--different ones are brought out by the environment. Therefore, design your organizational and home spaces in ways that are turn ons for you. (Also, know what turns you off.)

LIFE/WORK PLANNING QUESTIONS

1. How much money do you need to consider yourself effective?

2. What kind of work gives you the most job satisfaction?

3. What kind of an environment do you want to live and work in? (Include physical, social, economic, political)

4. What are the social needs of yourself and your family (e.g. mixing, partying, politicizing, etc.)?

5. What kind of personal/family life do you want to lead?

6. How much prestige does your ego require?

7. How much security do you need? Relate to risk taking.

THINK THROUGH THE CONFLICTS IN YOUR ANSWERS AND MAKE CONSCIOUS DECISIONS ABOUT TRADE-OFFS. BASE YOUR CAREER PLAN ON THE ABOVE.

CAREER DEVELOPMENT PLAN:

1. Analyze educational requirements.

2. Experience: Where should you go to get the kind of experience you need to achieve what you need?

3. What books should you read to improve your skills?

4. Skill Analysis: Develop whatever skills it takes to get to your goal.

5. What are areas of my person that need improvement?

6. What are my emotional liabilities? (Time bomb inside of you)

WHAT TO DO ABOUT JOB BURNOUT:

1. Change jobs.

2. Build in capacity to transcend the situation.

3. Redesign the job. Avoid situational negantrophy.

4. Change careers.

5. Get fulfillment outside of the job.

6. Know your stressors and how to tackle them.

7. Get career counseling.

8. Improve your time management skills.

9. Know your work and play rhythms and live accordingly.

10. Start your day in your own space.

DIRECTIONS: Circle the appropriate number, or fill in the information requested.

1. This workshop met my needs:

   1 Not at all

   2 Somewhat

   3 Average

   4 Well

   5 Very Well

2. I found the following topic or activity to be the most valuable:

   _____

   _____

3. I found the following topic or activity to be the least valuable:

   _____

   _____

   What recommendations would you make to improve the topic or activity you described as least valuable?

   _____

   _____

4. What is your reaction to the training materials?

   1 I'll share this with other staff.

   2 This is good resource material and may work.

   3 I'm not sure how helpful this will be, and don't know if I will use it.

   4 I'll never use this information.

   General comments about training materials:_____

   _____

   _____

5. What types or styles of training methods did you find most useful during this training? (Check only two)

1	Lecture	5	Panel presentation
2	Small Groups	6	Question and answer period
3	Large groups	7	Simulation experience
4	Role playing	8	Inventories

Comments _____

_____

6. Has your knowledge of the training topic(s) increased as a result of your participation in this workshop?

1 Yes

2 No

3 Undecided

7. Will your job performance change in any way as a result of this training experience?

1 Yes

2 No

3 Somewhat

8. Indicate how you think your job performance will change as a result of this training program:

_____

_____

_____

9. Please rate how well you feel the following objectives were accomplished:

A Identify short and long range environmental factors that may influence job performance:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

B Identify 3 growth tracks for increasing staff potential and develop an action plan for implementing growth tracks:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

C Identify three stages of career burn out and apply preventive and treatment strategies for each stage:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very Well

My personal goals for using the information presented on the topic of Motivating, Managing and Developing People are:

1.

2.

3.

Signed: _____

Lex Frieden

TIRR THE INSTITUTE FOR REHABILITATION AND RESEARCH
in the Texas Medical Center / 1333 Moursund Avenue / Houston, Texas 77030 / (713) 797-1440

M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Re: Session #5 - Creative Management of Stress

Date: June 24, 1981

Enclosed is the material describing the fifth session of Supervisory Skills - Creative Management of Stress. It would be helpful if you could read this before your session on July 1, 1981. The cover information describes what we will be doing during the session as well as what your "homework" assignment will be.

Please remember that this session is a 6 hour session and will last from 1:00 p.m. until 7:30 p.m. Please make appropriate arrangements with your departments, your families, and your transportation so that you will not be disturbed during this time. Thank you.

RECEIVED JUL 1 1981

SEATING ARRANGEMENTS FOR THE FIFTH SESSION - CREATIVE MANAGEMENT OF STRESS

Table 1

1. Lex Frieden
2. Diane Clark
3. Marie Puryear
4. Jean Cole
5. Lynda Collins
6. Mary Moore
7. Carlos Guillory

Table 2

1. Judy Findlay
2. Effie LaMothe
3. Marilyn Lockett
4. Mildred Branner
5. Geneva Johnson
6. Lou Parker
7. Karen Zinzer
8. Betty Olson

Table 3

1. Peggy Kanellos
2. Sandra Pugh
3. Melanie Norwood
4. Elizabeth Meadows
5. Betsy Martin
6. Marci Jackson
7. Mildred Johnson
8. Ann Guitierrez

Table 4

1. Milli Patti
2. Linda Brightman
3. Diane Atkins
4. Eleanore Grefe
5. Lourdes Cuellar
6. Marcia Sanderson
7. Laura Campion

Table 5

1. Jean Johnston
2. Ilana Doneson
3. Ann Worthy
4. Betty Wall
5. John Fletcher
6. Gordon Stanley
7. Gerda Baker
8. Gloria Tavis

Table 6

1. Carol Stillman
2. Carnel Roco
3. Laverne Hurston
4. Diana Bertrand
5. Saramma Ninan
6. Dorit Hanover
7. Mary Sawyer
8. Cindy Monroe

Table 7

1. Sue Axel
2. Kathleen Jones
3. Ruby Banks
4. Relia Scott
5. Lida Dahm
6. Lillian Thomas
7. Harlan Brown
8. Jane Fisher

Table 8

1. Gloria Tavis
2. Beverly Koch
3. Carol Campbell
4. Ruby Davis
5. Kristy Davidson
6. John Lagunas
7. Roxanne Balweber

Topic: Creative Management of Stress

Description: This session is designed to assist participants in identifying:

1. Current areas of stress in their lives;
2. Circumstances which could induce stress;
3. Family proneness to illnesses which may result from inadequate handling of stress;and
4. Techniques for combating stress related problems.

Rationale: Stress has been defined as the nonspecific response of the body to any demand. This statement implies that stress is not necessarily bad. In fact, it cannot be avoided; merely being alive involves continual stress. Stress only becomes distructive when the individual's reaction is insufficient, inappropriate or excessive. It is essential that managers on all levels be able to recognize, appreciate and control stress both in the workplace and in their personal lives, and develop and operate stress-management programs. This course provides participants with the backgeround knowledge and activities necessary for developing these skills.

Performance Objectives:

- Identify organizational, individual and personal stressors in your life
- Complete an assessment of family proneness toward disease and analyze the pattern
- Devise an action plan to modify your behavior concerning stress

Advance Organizer for Presentation:

1. Determine areas of stress at work and at home.
2. Discuss different periods of stress that you have gone through.
3. Determine life event changes that you have experienced during the last year.
4. Determine and analyze illnesses your family is most prone to develop.
5. Analyze the findings on the Wellness Inventory and develop an action plan for high level wellness.

Learning Activities:

1. Complete a stress evaluation questionnaire.
2. Complete a life event changes inventory.
3. Complete a "family illness tree".
4. Complete a wellness inventory.
5. Practice various meditation techniques.
6. Complete a value system inventory.

WORKSHOP SCHEDULE

IDENTIFYING CAUSES AND SYMPTOMS OF STRESS

The nature of stress. How the organization as well as the individual creates stress. Our adaptive range for coping with stress. Physiology of stress: flight or fight snydrome. Identification of personal stress triggers. Relationship of stress to stages in adult life.

RELATIONSHIP OF STRESS TO DISEASE

Distress and the onset of disease. Personality and illness: cancer, cardio-vascular disease, arthritis, migraine, afflictions of civilizations. Optimal stress levels. Constructive use of stress. How stress can be used as a positive force at work.

AN INTEGRATED APPROACH TO MANAGING PERSONAL AND ORGANIZATIONAL STRESS

Stress treatment techniques:
autogenic training, meditation, visualization, relaxation response, exercise, diet, values clarification, developing your own philosophy.
Designing a personalized stress management program.

Workshop Evaluation

Further expansion of the nations health care system is likely to produce only marginal increases in the overall health status of the American people...the greatest benefits are likely to accrue from efforts to improve the health habits of all Americans and the environment in which they live and work.

The Forward Plan for Health, HEW, 1975.

You were born to choose--not born to lose.

Success, Lila Swell.

No wind favors the person who has no destined port.

Montaigne

All people have the stars,...but they are not the same things for different people. For some, who are travelers, the stars are guides. For others they are no more than little lights in the sky. For others who are scholars they are problems. For my businessman they were wealth. But all these stars are silent. You--you alone--will have the stars as no one else has them.

Antoine de Saint-Exupery, The Little Prince

Some people are stress seekers. They need it to live and be happy. This is good and they should seek it. They are like racehorses. Other people are stress avoiders. They want to be placid and easy going. This is what they need to live, and they should avoid stress. We call them turtles.

Whatever one does, a person must strive to live with his/her nature and be useful. Usefulness can simply be that a person has good will toward others.

Han Selye

STRESS EVALUATION QUESTIONAIRE

1. Describe three job situations that create stress for you.

   1.

   2.

   3.

2. How often do you skip lunch or take less than the usual time?

   ____ Rarely or never (once every 2 weeks or less) ____Occasionally (once a week) ____Frequently (Twice a week or more)

3. How often do you take your work home during the week?

   ____ Rarely or never ____Occasionally ____Frequently

4. Which of these do you have occasionally or frequently?

____ Insomnia	____Indigestion
____ Worrying	____Fatigue
____ Anxiety	____Hypertension
____ Headaches	____Colds, Flu, etc
____ Tension	____Irritability
____ _____	____Tense neck, back, etc

5. How often do these statements apply to you at work?

   I have several things to do at once and not enough time to do them ____Rarely ____Occasionally ____Frequently

   I will do anything I can to keep from failing at a task ____Rarely ____Occasionally ____Frequently

6. Describe three job situations that give you satisfaction?

   1.

   2.

   3.

7. How often do you engage in non-work physical activity, sports, or exercise?

   ____ Rarely or never ____ Occasionally ____ Frequently

8. How often do you engage in a relaxing hobby or mental recreation?

   ____ Rarely or never ____ Occasionally ____ Frequently

SOCIAL READJUSTMENT SCALE

RANK		Mean Value
1	Death of spouse	100
2	Divorce	73
3	Marital separation	65
4	Jail term	63
5	Death of close family member	63
6	Personal injury or illness	53
7	Marriage	50
8	Fired at work	47
9	Marital reconciliation	45
10	Retirement	45
11	Change in health of family member	44
12	Pregnancy	40
13	Sex difficulties	39
14	Gain of new family member	39
15	Business readjustment	39
16	Change in financial state	38
17	Death of close friend	37
18	Change to different line of work	36
19	Change in number of arguments with spouse	35
→20	Mortgage over $10,000	31
21	Foreclosure of mortgage or loan	30
22	Change in responsibilities at work	29
23	Son or daughter leaving home	29
24	Trouble with in-laws	29
25	Outstanding personal achievement	28
26	Wife begins or stops work	26
27	Begin or end school	26
28	Change in living conditions	25
29	Revision of personal habits	24
30	Trouble with boss	23
31	Change in work hours or conditions	20
32	Change in residence	20
33	Change in schools	20
34	Change in recreation	19
35	Change in church activities	19
36	Change in social activities	18
→37	Mortgage or loan less than $10,000	17
38	Change in sleeping habits	16
39	Change in number of family get-togethers	15
40	Change in eating habits	15
41	Vacation	13
42	Christmas	12
43	Minor violations of the law	11

TOTAL COLUMN A= _____

TOTAL COLUMN B= _____

TOTAL COLUMN A + B = _____

Source: T. Holmes and M. Masuda, "Psychosomatic Syndrome," Psychology Today, April, 1972.

ACTION PLAN

1. Life goal or philosophy

2. Organizational and departmental stressors

3. Personal Stressors

4. Dietary Actions

5. Exercise Actions

6. Relaxation or Meditative Plan

COPING WITH STRESS

1. What are your goals in life?

   Life goals:

   1.
   2.
   3.
   4.

   Are you sure you are not striving for more than you really want or need?

2. Are you leading your life your way?

   Or are you trying to measure up to someone else's (society's, the hospital or health care agency you work for, or the neighbor's, or parent's) standards?

3. Do you set aside time to relax and refresh your mind and body? (Think about what you did on your last days off or on your last vacation)

   Do you allow yourself enough pleasure and rest?

   Or do you drive and push yourself constantly? (Review what you did after comming home from work yesterday)

4. What situational factors in your life trigger stress?

5. What type of person provokes stress in your life?

6. Do you feel you are currently able to develop to your fullest potential?

   What is aiding you or hindering you from attaining your fullest potential?

7. How do role tensions, role ambiquities, or role expectations at home, at work or in our society affect your stress level?

8. Do you have as much power as you want?

9. Are you in control of your life?

AVOIDING STRESS RELATED TO FEAR

In general, follow these rules:

1. Take a philosophical outlook toward life: hope for the best, plan for the worst, and take what comes with humor and style.

2. Don't whine.

3. Only rarely will anything turn out as badly as we fear. So why waste time and energy out of imagining the worse?

4. When trouble comes, don't give in to first inclinations to immobility and solitude. Do something about your troubles.

5. If your sleep is affected by your stress: cut down on your evening meal and start doing evening exercises. An ideal way to eat during stressful times is a large breakfast, a light lunch and very little dinner.

6. Don't drink to drown your sorrows.

7. Help others. Through helping others you will be able to see your own problems in a better perspective.

8. Never despair, never give up.

STEPS TO CONTROLLING STRESS

1. EXERCISE on an empty stomach for five to fifteen minutes after getting up every morning. It is important that you stretch all muscles (arms, legs, stomach, and back) and get the heart pumping blood.

2. PRACTICE RELAXATION RESPONSE - for fifteen to twenty minutes in the morning.

3. VISUALIZE YOUR DAY GOING WELL FOR YOU. Imagine for one to two minutes the day going the way you would like it to. Picture these activities and then begin your day.

4. PRACTICE RELAXATION RESPONSE - for at least five minutes prior to going to bed.

5. VISUALIZE YOUR DAY IN REVIEW - to discover patterns of how you react to stress.

6. PHYSICAL ACTIVITY - Set aside two 45-minute periods each week during which you do some strenous physical activity, such as jogging, jumping rope, playing tennis or squash, swimming, doing yoga or dance movements, or even taking a brisk walk.

RELAXATION RESPONSE AND STRESS

External Response	Relaxation	Stress
* Breathing	Slow	Fast, shallow
* Muscles	Relaxed	Tense
* Hands	Warm & dry	Cold & sweaty
Movement	Slight	Figidity
Pupils of eyes	Constricted	Dilated
ǂ Heart beat	Slow & regular	Fast & irregular
ǂ Blood flow	To digestive system	To brain and muscles
ǂ Blood pressure	Decreased	Increased
Liver	No response	Releases sugar
Spleen	No response	Releases white corpulses
Pituitary gland	No response	Releases ACTH
Adrenal glands	No response	Releases corticiods
Thymus	No response	shrinkage

* Relaxation techniques mainly focus on these areas and other areas of the body will follow.

ǂ Body ready for flight or fight.

THE RELAXATION RESPONSE

This is a simple easy to learn technique of destressing that was developed by Dr. Herbert Benson of Harvard Medical Schoool. It can be done at work, at home or any place that you can sit quietly for about 10 minutes. Research studies of this and similar mental approaches to destressing show that they produce the following results:

relaxation of physical tensions
lowered blood pressure and slower pulse rate
a more relaxed mental state

INSTRUCTIONS

1. Arrange not to be disturbed

2. Sit quietly in a comfortable position, hands in your lap, legs uncrossed, close your eyes.
3. Relax all you muscles beginning at the top of your head and going through your body down to your toes.

4. Breathe through your nose. As you breathe out, say the word "ONE" silently to your self.

   Each time you exhale say the word "ONE" and keep your attention on saying it.

   Remain relaxed and calm. If you notice tensions in your body, relax them. If thoughts come to your mind or distract you, just return to repeating "ONE". Let the thoughts go. Don't get caught up in them.

5. Continue for 10--20 minutes, but no longer.

6. When you finish, open your eyes slowly, sit for a few minutes. Stretch your head and neck, take a few slow, full breathes.

When you resume work, try to maintain the same state of calm that you feel during the relaxation.

Based on The Relaxation Response, by Herbert Benson, MD.

VALUES

Security
Status
Being Liked
Recognition
Approval
Affection
Belongingness

Acceptance
Power
Achievement
Authority
Service
Glamour
Money

DAILY STRESS AND TENSION LOG

Decription of Stress or tension felt	Time of Day	Where? Doing What? With Whom?	What thought or feelings did I have?	What Did I do in response to the stress?
1. Headache, Tight neck muscles, Fatigue	10:45 am	At work, Repeated interruptions and demands on my time.	Frustration Anger	Became irritable and short tempered
2.				

SELF CONTRACTS FOR PLANNING PHASE OF STRESS MANAGEMENT

Version one

I have decided to work on a program of stress managment and I will enlist the aid of _____.

I will set aside the following days and timesfor planning my program and practicingstress managment techniques:

_____.

Signed _____

Assistant _____

Date _____

Version two

I have decided to work on a program of stress management.
I will set aside the following days and times for planning my program and practicing stress management techniques: _____

_____

_____

Signed _____

Date _____

RELAXATION PRACTICE SCHEDULE

NAME _____ DATE _____

	Monday	Tuesday	Wednesday	Thursday
Morning Practice: Exercise				
Comments:				
Visualization:				
STRENOUS PHYSICAL ACTIVITY:				
Evening Practice: Relaxation Response				
Comments:				
Visualization: Day in Review				
Stress Patterns:				

RELAXATION PRACTICE SCHEDULE

NAME _____ DATE _____

	Friday	Saturday	Sunday	Weekly Summary Reward
Morning Practice: Exercise				
Comments:				
Visualization:				
STRENOUS PHYSICAL ACTIVITY:				
Evening Practice: Relaxation Response				
Comments:				
Visualization: Day in Review				
Stress Patterns:				

SUCCESS EXPERIENCE	REASON FOR IT BEING A SUCCESS FOR YOU	PATTERN OF SUCCESS

My personal goals for using the information presented on the topic of creative management of stress are:

1.

2.

3.

Signed: _____

DIRECTIONS: Circle the appropriate number, or fill in the information requested.

1. This workshop met my needs:

   1 Not at all

   2 Somewhat

   3 Average

   4 Well

   5 Very Well

2. I found the following topic or activity to be the most valuable:

   _____

   _____

3. I found the following topic or activity to be the least valuable:

   _____

   _____

   What recommendations would you make to improve the topic or activity you described as least valuable?

   _____

   _____

4. What is your reaction to the training materials?

   1 I'll share this with other staff.

   2 This is good resource material and may work.

   3 I'm not sure how helpful this will be, and don't know if I will use it.

   4 I'll never use this information.

   General comments about training materials:_____

   _____

   _____

5. What types or styles of training methods did you find most useful during this training? (Check only two)

1	Lecture	5	Panel presentation
2	Small Groups	6	Question and answer period
3	Large groups	7	Simulation experience
4	Role playing		

Comments _____

_____

6. Has your knowledge of the training topic(s) increased as a result of your participation in this workshop?

1 Yes

2 No

3 Undecided

7. Will your job performance change in any way as a result of this training experience?

1 Yes

2 No

3 Somewhat

8. Indicate how you think your job performance will change as a result of this training program:

_____

_____

_____

9. Please rate how well you feel the following objectives were accomplished:

A Identify organizational, individual and personal stressors in your life:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

B Complete an assessment of family proneness toward disease and analyze the pattern:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

C Devise an action plan to modify your behavior concerning stress:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

Lex Frieden

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in the Texas Medical Center / 1333 Moursund Avenue / Houston, Texas 77030 / (713) 797-1440

RECEIVED JUN 2 2 1981

M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Re: Session #4 - Diagnosing Appropriate Leadership and Motivation

Date: June 1, 1981

Enclosed is the material describing the fourth session of Supervisory Skills - Diagnosing Appropriate Leadership and Motivation. It would be helpful if you could read this before your session on June 24, 1981. The cover information describes what we will be doing during the session as well as what your "homework" assignment will be.

When you come on the 24th, besides bringing this packet with you, please also bring your scores from the Leadership Inventory which you took during the May 27 session. We will take that Inventory again, and it will be very helpful for you to be able to compare your scores.

See you then.

A voluntary, not-for-profit hospital for restorative medicine serving the disabled through care, research and education.

Services Offered: Early restorative medical care, comprehensive rehabilitation, surgical restoration, diagnostic evaluation and planning, independent living services, vocational evaluation, training, placement, sheltered employment.

SEATING ARRANGEMENTS FOR THE FOURTH SESSION - DIAGNOSING APPROPRIATE LEADERSHIP

Table 1

1. Laverne Hurston
2. Kathleen Jones
3. Betty Wall
4. Kristy Davidson
5. Lourdes Cuellar
6. Marci Jackson
7.
8. John Legunas

Table 2

1. Sue Axel
2. Carnel Roco
3. Ann Worthy
4. Eleanore Grefe
5. Betsy Martin
6. Lou Parker
7. Carlos Guillory
8. Ruby Davis

Table 3

1. Michael White
2. Johnnie Mitchell
3. Diane Atkins
4. Elizabeth Meadows
5. Geneva Johnson
6. Mary Moore
7. Carol Campbell
8. Jane Fisher

Table 4

1. Jean Johnston
2. Linda Brightman
3.
4. Mildred Branner
5. Lynda Collins
6. Cindy Monroe
7. Beverly Koch
8. Harlan Brown

Table 5

1. Milli Patti
2. Regina Pierce
3. Joe Syon
4. Mary Sawyer
5. Jean Cole
6. Lillian Thomas
7. Gloria Tavis

Table 6

1. Rick Keniston
2. Effie LaMothe
3. Marie Puryear
4. Dorit Hanover
5. Lida Dahm
6. Gerda Baker
7. Laura Campion

Table 7

1. Judy Findlay
2. Diane Clark
3. Saramma Ninan
4. Gordon Stanley
5.
6. Relia Scott
7. Ann Gutierrez

Table 8

1. Lex Frieden
2. Ruby Banks
3. Diana Bertrand
4. John Fletcher
5. Marcia Sanderson
6. Mildred Johnson
7. Betty Olson

Topic: Diagnosing Appropriate Leadership and Motivation (continuation of Session 3 - Dynamic Leadership)

Description: As a follow-up to Session 3, this session is designed to assist participants in identifying:

1. Jobs which require a low degree of flexibility vs. jobs which require a high degree of flexibility;
2. Characteristics of task relevant maturity levels; and
3. Maslow's hierarchy of needs and how it relates to task relevant maturity level.

Rationale: The way in which a department functions is, in many ways, dependent upon the leadership style(s) of the department head and staff supervisors. Maximum departmental functioning can only be achieved when these individuals are able to vary their styles of leadership commensurate with the maturity level of the staff. This skill is based upon an individual's familiarity with the various leadership styles, and ability to identify an employee's maturity level and individual needs. This course provides participants with the background knowledge and activities necessary for developing these skills.

Performance Objectives: Upon completion of the session, participants will be able to:

- Site instances from his own experience in which he did not use the most appropriate leadership style or in which he appropriately used one of his least preferred styles
- Identify job tasks which require either low or high flexibility
- Identify characteristics associated with task relevant maturity and immaturity
- Identify the four levels of Maslow's hierarchy of needs as they relate to task relevant maturity of employees

Advance Organizer for Presentation:

1. Discuss homework assignment from Session 3.
2. Define low vs. high flexibility demands and low vs. high task relevant maturity.
3. Discuss the State Hospital case.
4. Define Maslow's hierarchy of needs.
5. Discuss the Bob Smith case.

Instructional Methods:

1. Lecture/discussion
2. Small group activities

Learning Activities:

1. List situations in which participants a) did not use the most appropriate leadership style, or b) used their least preferred style.
2. Answer questions concerning the Bob Smith case.
3. Complete the Leadership Styles Inventory.

Between Session Assignment: Before the next session, answer the following questions about a puzzling employee:

1. What is the employee's maturity level?
2. Where is the employee on Maslow's hierarchy of needs?
3. What task is the employee currently not completing effectively?
4. What leadership style should you use to assist him in completing that task?

JOBS REQUIRING LOW OR HIGH LEADERSHIP STYLE RANGE

Low Flexibility Demands	High Flexibility Demands
Low-level managerial jobs	High-level managerial jobs
Simple managerial jobs	Complex managerial jobs
Established goals	Emerging goals
Tight procedures	Fluid procedures
Established goals	Unstructured tasks
Routine, automated, decision-making	Nonroutine decision-making
Little environmental change	Rapid environmental change
Manager has complete power	Manager does not have complete power
Following plans essential	Using initiative essential
Manager accepted or rejected by subordinates	Subordinates neutral to manager
Few interconnecting jobs	Many interconnecting jobs

TASK RELEVANT MATURITY

Low Task Relevant Maturity Characteristics	High Task Relevant Maturity Characteristics
Dependent	Independent
Passive	Active
Behaves in few ways	Behaves in many ways
Not aware of how behavior affects others	Aware of how behavior affects others
Short time perspective	Long time perspective

EFFECTIVE AND INEFFECTIVE USE OF LEADERSHIP STYLES

Basic Styles	Effective	Ineffective
High Task and Low Relationships	Seen as knowing what they want and imposing their methods for accomplishing this without creating resentment.	Seen as having no confidence in others, unpleasant, and interested only in short-run output.
High Task and High Relationships	Seen as satisfying the needs of the group for setting goals and organizing work, but also providing high levels of socio-emotional support.	Seen as initiating more structure than is needed by the group and spends more time on socioemotional support than necessary.
High Relationships and Low Task	Seen as having implicit trust in people and as being primarily concerned with developing their talents.	Seen as primarily interested in harmony and being seen as "a good person," and being unwilling to risk disruption of a relationship to accomplish a task.
Low Task and Low Relationships	Seen as appropriately permitting subordinates to decide how the work should be done and playing only a minor part in their social interaction.	Seen as uninvolved and passive, as a "paper shuffler," who cares little about the task at hand or the people involved.

MATURITY I STYLE

Style 1 - Telling

I M M A T U R E

* concerned about hygiene factors: physiological and safety
* child ego state
* problem to leader not followers

Style 2 - Selling

* concerned about hygiene factors: safety and social
* child and parent ego state
* problem to leader and followers

Style 3 - Participating

M A T U R E

* concerned about motivator factors: social, esteem
* parent and adult ego state
* problem to followers, not leader

Style 4 - Delegating

* concerned about motivator factors: esteem, self actualization
* adult ego state
* not problem to leader or followers

BOB SMITH CASE

In 1955 a forty bed hospital was opened in a small community. An employee of a local appliance repair shop, Bob Smith, was employed as a part-time maintenanceman to maintain the proper functioning of the physical plant.

The hospital enlarged in succeeding years, in 1970 had become a three-hundred bed general hospital. The duties and responsibilities of Bob Smith enlarged commensurately. He discovered that he was often required to work overtime and was frequently called back to the hospital during the night to make necessary repairs. He conscientiously performed his work without complaint and became over the years a devoted and loyal employee. Additional men were occasionally added to the maintenance department, and Bob Smith was made head of the Maintenance Department, placed on salary, and given the responsibility of directing the effort of seven subordinates.

The Assistant Administrator soon noted that Bob Smith still preferred personally to make repairs on equipment rather than direct the efforts of his subordinates. Bob was called before the Assistant Administrator who discussed with him the nature of his new position. He was told that the work of the maintainance department had grown in complexity and responsibility with hospital expansion. One man could no longer perform the work required of that department. A department head must select capable subordinates, train these subordinates to maintain equipment, and direct them in such a way that work is performed in an efficient manner. Bob Smith agreed to appear each day in the dress required of the department head, shirt and tie, and to perform the functions of the department head.

The Assistant Administrator was disappointed to learn in the following months that Bob Smith was department head in title only. Other department heads were complaining that equipment was in need of repair. It was reported that when maintenance department personnel were summoned, more likely than not, they were unable to complete the work without calling Bob Smith personally to complete the work. One department head informed the Assistant Administrator that Bob Smith was inclined to be possessive in regard to equipment, resented anyone else making repairs, and refused to delegate responsibility for repairs to subordinates. Bob Smith preferred, instead, working long hours overtime and returning to the hospital in the early hours of the morning. He had also hesitated to select and to train competent subordinates.

The Assistant Administrator, realizing some action should be taken, was reminded by at least one department head that Bob Smith was a valuable employee and had devoted many years to the hospital and exhibited unique loyalty. To discharge or to demote such a man would be a poor way indeed to compensate him for such loyalty.

Questions about the Bob Smith Case

1. What was the maturity level of Bob Smith prior to and after being made Department Head?

2. What was Maslow's need level of Bob Smith prior to and after becoming Department Head?

3. What was the style of the Assistant Administrator prior to and after making Bob Smith Department Head?

4. What was the maturity level of Bob Smith's staff?

5. What was the leadership style of Bob Smith prior to and after being made Department Head?

6. What should the hospital do?

1

SITUATION

Your subordinates are not responding lately to your friendly conversation and obvious concern for their welfare. Their performance is in a tailspin.

ALTERNATIVE ACTIONS

A. Emphasize the use of uniform procedures and the necessity for task accomplishment.
B. Make yourself available for discussion but don't push.
C. Talk with subordinates and then set goals.
D. Intentionally do not intervene.

2

SITUATION

The observable performance of your group is increasing. You have been making sure that all members were aware of their roles and standards.

ALTERNATIVE ACTIONS

A. Engage in friendly interaction, but continue to make sure that all members are aware of their roles and standards.
B. Take no definite action.
C. Do what you can to make the group feel important and involved.
D. Emphasize the importance of deadlines and tasks.

3

SITUATION

Members of your group are unable to solve a problem themselves. You have normally left them alone. Group performance and interpersonal relations have been good.

ALTERNATIVE ACTIONS

A. Involve the group and together engage in problem-solving.
B. Let the group work it out.
C. Act quickly and firmly to correct and redirect.
D. Encourage group to work on problem and be available for discussion.

4

SITUATION

You are considering a major change. Your subordinates have a fine record of accomplishment. They respect the need for change.

ALTERNATIVE ACTIONS

A. Allow group involvement in developing the change, but don't push.
B. Announce changes and then implement with close supervision.
C. Allow group to formulate its own direction.
D. Incorporate group recommendations, but you direct the change.

5

SITUATION

The performance of your group has been dropping during the last few months. Members have been unconcerned with meeting objectives. Redefining roles has helped in the past. They have continually needed reminding to have their tasks done on time.

ALTERNATIVE ACTIONS

A. Allow group to formulate its own direction.
B. Incorporate group recommendations, but see that objectives are met.
C. Redefine goals and supervise carefully.
D. Allow group involvement in setting goals, but don't push.

6

SITUATION

You stepped into an efficiently run situation. The previous administrator ran a tight ship. You want to maintain a productive situation, but would like to begin humanizing the enviroment.

ALTERNATIVE ACTIONS

A. Do what you can to make group feel important and involved.
B. Emphasize the importance of deadlines and tasks.
C. Intentionally do not intervene.
D. Get group involved in decision-making, but see that objectives are met.

7

SITUATION

You are considering major changes in your organizational structure. Members of the group have made suggestions about needed change. The group has demonstrated flexibility in its day-to-day operations.

ALTERNATIVE ACTIONS

A. Define the change and supervise carefully.
B. Acquire group's approval on the change and allow members to organize the implementation.
C. Be willing to make changes as recommended, but maintain control of implementation.
D. Avoid confrontation; leave things alone.

8

SITUATION

Group performance and interpersonal relations are good. You feel somewhat unsure about your lack of direction of the group.

ALTERNATIVE ACTIONS

A. Leave the group alone.
B. Discuss the situation with the group and then initiate necessary changes.
C. Take steps to direct subordinates toward working in a well-defined manner.
D. Be careful of hurting boss-subordinate relations by being too directive.

9

SITUATION

Your superior has appointed you to head a task force that is far overdue in making requested recommendations for change. The group is not clear on its goals. Attendance at sessions has been poor. Their meetings have turned into social gathering. Potentially they have the talent necessary to help.

ALTERNATIVE ACTIONS

A. Let the group work it out.
B. Incorporate group recommendations, but see that objectives are met.
C. Redefine goals and supervise carefully.
D. Allow group involvement in setting goals, but don't push.

10

SITUATION

Your subordinates, usually able to take responsibility, are not responding to your recent redefining of standards.

ALTERNATIVE ACTIONS

A. Allow group involvement in redefining standards, but don't push.
B. Redefine standards and supervise carefully.
C. Avoid confrontation by not applying pressure.
D. Incorporate group recommendations, but see that new standards are met.

11

SITUATION

You have been promoted to a new position. The previous supervisor was uninvolved in the affairs of the group. The group has adequately handled its tasks and direction. Group inter-relations are good.

ALTERNATIVE ACTIONS

A. Take steps to direct subordinates toward working in a well-defined manner.
B. Involve subordinates in decision-making and reinforce good contributions.
C. Discuss past performance with group and then you examine the need for new practices.
D. Continue to leave group alone.

12

SITUATION

Recent information indicates some internal difficulties among subordinates. The group has a remarkable record of accomplishment. Members have effectively maintained long range goals. They have worked in harmony for the past year. All are well qualified for the task.

ALTERNATIVE ACTIONS

A. Try out your solution with subordinates and examine the need for new practices.
B. Allow group members to work it out themselves.
C. Act quickly and firmly to correct and redirect.
D. Make yourself available for discussion, but be careful of hurting boss-subordinate relations.

DIRECTIONS FOR SCORING

Circle the letter that you have chosen for each situation on the same line to the right, under Column I (STYLE RANGE) and also Column II (STYLE ADAPTABILITY). After you have circled alternative actions, total the number of circles for each sub-column under Column I (STYLE RANGE) and Column II (STYLE ADAPTABILITY) and enter totals in the spaces provided below.

SITUATIONS	COLUMN I (Style Range) Alternative Actions				COLUMN II (Style Adaptability) Alternative Actions			
	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)
1	A	C	B	D	D	B	C	A
2	D	A	C	B	B	D	C	A
3	C	A	D	B	C	B	A	D
4	B	D	A	C	B	D	A	C
5	C	B	D	A	A	D	B	C
6	B	D	A	C	C	A	B	D
7	A	C	B	D	A	C	D	B
8	C	B	D	A	C	B	D	A
9	C	B	D	A	A	D	B	C
10	B	D	A	C	B	C	A	D
11	A	C	B	D	A	C	D	B
12	C	A	D	B	C	A	D	B
Sub-columns	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)

Multiply by:			
(a) -2	(b) -1	(c) +1	(d) +2

\+ \+ \+ = TOTAL

My personal goals for using the information presented on the topic of Diagnosing Appropriate Leadership and Motivation are:

1.

2.

3.

Signed: _____

DIRECTIONS: Circle the appropriate number, or fill in the information requested.

1. This workshop met my needs:

   1 Not at all

   2 Somewhat

   3 Average

   4 Well

   5 Very Well

2. I found the following topic or activity to be the most valuable:

   _____

   _____

3. I found the following topic or activity to be the least valuable:

   _____

   _____

   What recommendations would you make to improve the topic or activity you described as least valuable?

   _____

   _____

4. What is your reaction to the training materials?

   1 I'll share this with other staff.

   2 This is good resource material and may work.

   3 I'm not sure how helpful this will be, and don't know if I will use it.

   4 I'll never use this information.

   General comments about training materials: _____

   _____

   _____

5. What types or styles of training methods did you find most useful during this training? (Check only two)

1	Lecture	5	Panel presentation
2	Small Groups	6	Question and answer period
3	Large groups	7	Simulation experience
4	Role playing		

Comments _____

_____

6. Has your knowledge of the training topic(s) increased as a result of your participation in this workshop?

1 Yes

2 No

3 Undecided

7. Will your job performance change in any way as a result of this training experience?

1 Yes

2 No

3 Somewhat

8. Indicate how you think your job performance will change as a result of this training program:

_____

_____

_____

9. Please rate how well you feel the following objectives were accomplished:

A Site instances from your own experience in which you did not use the most appropriate leadership style or in which you appropriately used one of your least preferred styles:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

B Identify job tasks which require either low or high flexibility:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

C Identify characteristics associated with task relevant maturity and immaturity:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

D Identify the four levels of Maslow's hierarchy of needs as they relate to task relevant maturity of employees:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

Lex Frieden

TIRR THE INSTITUTE FOR REHABILITATION AND RESEARCH
in the Texas Medical Center / 1333 Moursund Avenue / Houston, Texas 77030 / (713) 797-1440

M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Re: Session #7 - Time Management and Delegation

Date: August 24, 1981

Enclosed is the material describing the seventh session - Time Management and Delegation. It would be helpful if you could read this before your session on September 16, 1981. The cover information describes what we will be doing during the session, as well as what your homework assignment will be.

REMEMBER TO BRING YOUR 3 X 5 INDEX CARDS WITH YOUR HOMEWORK FROM THE AUGUST SESSION.

See you on September 16, 1981, 4:00 - 7:00 in the Promethean Room.

A voluntary, not-for-profit hospital for restorative medicine serving the disabled through care, research and education.

Services Offered: Early restorative medical care, comprehensive rehabilitation, surgical restoration, diagnostic evaluation and planning, independent living services, vocational evaluation, training, placement, sheltered employment.

SEATING ARRANGEMENTS FOR THE SEVENTH SESSION - TIME MANAGEMENT AND DELEGATION

Table 1

1. Effie LaMothe
2. Saramma Ninan
3. Jane Fisher
4. Gordon Stanley
5. Lida Dahm
6. Mildred Branner
7. Harlan Brown

Table 2

1. Linda Brightman
2. Gloria Tavis
3. Marci Jackson
4. Marilyn Lockett
5. Lou Parker
6. Elizabeth Meadows
7. Ruby Davis

Table 3

1. Ruby Banks
2. Carlos Guillory
3. Johnnie Mitchell
4. Karen Zinzer
5. Dorit Hanover
6. Betty Olson
7. Ann Worthy

Table 4

1. Mildred Johnson
2. Diane Clark
3. Carnel Roco
4. Kristy Davidson
5. Judy Findlay
6. Diana Bertrand
7. Betsy Martin
8. John Lagunas

Table 5

1. Ann Gutierrez
2. Cindy Monroe
3. Lillian Thomas
4. Laverne Hurston
5. Gerda Baker
6. Peggy Kanellos
7. Lex Frieden
8. John Fletcher

Table 6

1. Sue Axel
2. Jean Johnston
3. Relia Scott
4. Mary Moore
5. Betty Wall
6. Carol Campbell
7. Beverly Koch
8. Laura Campion

Table 7

1. Sandra Pugh
2. Roxan Ballweber
3. Drucie Bohlen
4. Melanie Norwood
5. Eleanore Grefe
6. Ilana Doneson
7. Carol Stillman

Table 8

1. Geneva Johnson
2. Milli Patti
3. Rick Keniston
4. Lynda Collins
5. Jean Cole
6. Lourdes Cuellar
7. Marcia Sanderson
8. Mary Sawyer

Topic: Time Management and Delegation

Description: This session is designed to assist participants in identifying:

1. leading time wasters in his/her working environment;
2. how to eliminate those time wasters;
3. the degree to which s/he delegates;
4. how to delegate tasks based on an employee's communication style; and
5. the appropriate leadership style to use to insure maximum performance on the delegated task.

Rationale: One of the most valuable skills a supervisor can have is the ability to schedule and maximize the use of time, both for himself and for his employees. Time management skills, which include delegation, may be the easiest and mose effective way to revamp the productivity - and the morale - of a unit or department. This course is structured to explain the theory behind these concepts, and to aid in the development of the techniques necessary for applying them.

Performance Objectives: Upon completion of the session, participants will be able to:

- Identify his own leading time wasters
- Apply management techniques to one particularly difficult time management problem in his work environment
- Determine how to select which tasks should be delegated and to whom
- Choose the leadership style which will facilitate one employee's performance on one delegated task

Advance Organizer for Presentation:

1. Discuss the concept of time management.
2. Identify creative solutions to time management problems.
3. Identify tasks which should be delegated.
4. Determine a rationale for matching staff with delegable tasks.
5. Determine the most appropriate leadership style to use while delegating.

Instructional Methods:

1. Lecture/discussion
2. Small group activities

Learning Activities:

1. Discuss leading time wasters and creative solutions.
2. Complete a questionnaire which will identify your delegation needs.
3. Complete a Delegation Inventory.
4. Identify one staff member with each style of communication; select a task to delegate to each which will use the strength of his style.
5. Complete the Response Sheet for one puzzling employee.

Between Sesssion Assignment: Before the next session, participants will:

1. apply at least one time management principle at home or work for a period of three weeks;
2. delegate at least one task to a subordinate based on his communication style; and
3. use the appropriate leadership style to obtain better performance from a puzzling employee.

A short description of these activities and the result of each will be recorded on a 3 x 5 index card and turned in during the October session.

LEADING TIME WASTERS

1. Telephone interruptions
2. Preoccupation
3. Meetings, both scheduled and unscheduled
4. Negative feelings -- handling emotional energy
5. Lack of objectives, priorities and deadlines
6. Cluttered desk and personal disorganization
7. Involvement in routine and detail that should be delegated to others
8. Attempting too much at once and underestimating the time it takes to do it
9. Failure to set up clear lines of responsibility and authority
10. Inadequate, inaccurate or delayed information from others
11. Indecision and procrastination
12. Lack of or unclear communication and instruction
13. Inability to say "No"
14. Visitors dropping in without appointments
15. Crisis situations for which no plans were possible

HANDLING INFORMATION OVERLOADS

1. Read books like newspapers. Read only the portions you are interested in.
2. Read headlines on jacket first.
3. Glance through the book quickly looking for things that may interest you.
4. Give yourself no more time than you would take to read a newspaper.
5. Your job in reading a book is to find the key ideas and understand how they apply to your situation. (Preface, table of contents and summaries will help you to do this quickly).
6. Since we remember little of what we read, it saves time to be selective and read only what is most likely to be worth remembering.

HOW TO HANDLE MAIL AND CORRESPONDENCE

1. Look for opportunities to eliminate or reduce the volume of paper that comes in. Discontinue obsolete reports.
2. Write informal notes right on a piece of incoming mail.
3. Use a dictating machine. Dictate only key ideas.
4. Handle each piece of paper only once. Do something to move ahead a project each time you pick it up.
5. Question whether you should correct or make changes to a letter once it is typed.

REMEMBERING IDEAS

1. Write it down. Make a habit of carrying a note card in your pocket so you can write down your bright ideas.
2. Keep a tape recorder in your car - especially if you do your best thinking in the traffic.
3. Put pen and paper in many locations in your house so that you can immediately record any thoughts you have.

GETTING CONTROL OF PAPER WORK

1. Divide your paper work into three categories:
   a. Those things which require some action.
   b. Those things which must be read and passed on or filed.
   c. Those things which can be thrown away and forgotten.

2. How to handle your action items:
   a. Analyze each of your action items.
      1. What kind of action is required?
      2. Who must do it?
   b. Don't set aside any item until you have taken some action or at least scheduled some action.

3. How to handle your reading items:
   a. Read one item at a time.
   b. Don't set aside anything until you have noted whether it is to be filed or sent on.
   c. Never put a piece of paper that requires action or reading in a pending file.

4. How to control paper flow:
   a. Don't record it. When you examine the need for records closely, it is amazing how many things don't need to be recorded.
   b. Don't ask for it. Some people keep asking to be put on routing systems for fear they will miss something of great importance.
   c. Throw it away.
   d. Discontinue it. This applies to all the things you should have paid attention to under a. and b. but didn't.
   e. Use the telephone. Not to mention the time savings, think about the money you can save. The cost of preparing and mailing a letter these days can cost between $3.27 and $7.50, depending upon whose statistics you read.
   f. Set up your own rules for what paper you keep and what paper you throw away. Think through your own situation and the kinds of paper coming through your office. Make a list of what should be discarded, what must be kept and for how long.

HANDLE A PIECE OF PAPER ONLY ONCE.

SETTING TIME PRIORITIES

1. Make a list of all the things you have to do.

2. Get three slips of paper.

3. Assign A, B, and C priorities to each item on your list. A items have the highest priorities, B the next highest and C the lowest priorities.

4. Head up one of the slips with the phrase "HAVE TO DO LIST", the second sheet "SHOULD DO LIST" and the third sheet "DEFERRED LIST".

5. All A items will be listed on the "HAVE TO DO LIST". Remember this list will include only items you must do today and only the highest priority items.

6. All B items will be listed on the "SHOULD DO LIST". Remember this list will include all those things you feel you ought to do or feel it would be a good thing to do.

7. All C items will be listed on the "DEFERRED LIST". Oftentimes this list will include many "request items" which do not have much impact on the overall goals of the operation.

8. Staple the three lists together with the "HAVE TO DO LIST" on top, followed by the "SHOULD DO LIST" and the "DEFERRED LIST".

9. As you complete tasks on the "HAVE TO DO LIST" cross them off. You may also want to add other items to the list as you go through the day.

10. Re-write the "HAVE TO DO LIST" at the end of the day.

HOW TO ORGANIZE THE "HAVE TO DO LIST"

1. Functional arrangement:
   to see, to telephone, to follow up, to decide, to delegate

2. Similarity of content:
   group all the items together that are similar

3. Similarity of work location:
   group all consumers in a neighborhood to be served

4. Similarity of person involved:
   items to be discussed with the director or administrator

5. One item can represent a group of items:
   processing papers in your in-box

TIME COMPULSION VS. TIME CHOICES

Time is divided into:

1. doing things you want to do (choice)
2. doing things you think you have to do (compulsion)

When you are making an important decision, it is very important to be in choice- not compulsion.

If you say "It is the only thing I can do", then you are probably in compulsion.

FIVE MAJOR COMPULSIVE WAYS PEOPLE SPEND TIME

1. Be Strong - difficulty in delegating, won't ask for help
2. Try Hard - makes tasks difficult, wants to suffer
3. Please Me - difficulty giving negative feedback, expects other to know what he wants
4. Be Perfect - wants more information than he needs
5. Hurry Up - rushing all the time, embarrassed to be slow

MYTHS ABOUT MANAGING TIME

1. "I am waiting until I have more time."
2. "It doesn't work for me."
3. "But I have already read the book. . . taken the course . . . etc."
4. "I don't have time to do what I want to do."
5. "You just can't get organized around here."
6. "But people keep interrupting me."

SECRET PLEASURE OF MISMANAGING TIME

1. Getting attention
2. Secret power - delay and withhold
3. Avoiding the unpleasant
4. Fear of feeling too good
5. Avoiding closeness

HOW TO GET YOURSELF OUT OF A FUNK, OR, 10 KEY CONCEPTS TO MANAGING TIME

1. Clear your mind. What factors are involved in your "funk". What is keeping you down.

2. Keep an up-to-date list of your wants or your priorities. Include both long term and short term goals, and things that may appear unfeasible.

3. Pay attention to your motivation level. Is it sufficient? Look at adding reinforcements and rewards.

4. Group related items together (on your list of priorities), and complete the highest priority items first.

5. Concentrate on doing one thing at a time.

6. Divide big jobs into workable steps.

7. Use a timetable.

8. Finish each thing fully.

9. Reward and reinforce the best.

10. DO IT NOW! Spend time doing what really counts.

EVALUATE YOUR OWN TIME MANAGEMENT BEHAVIOR

Ask yourself the following questions:

1. Do you have a difficult time sitting still and doing nothing?
2. Do you frequently take work to social or pleasurable events?
3. Do you find it difficult to relax without alcohol or a substitute?
4. Do you think of work during relaxation or sex?
5. Do you enjoy letting others know you work long hours?
6. Do you have trouble letting go and having fun?
7. When you take a day off, do you leave a number where you can be reached?
8. When you add up the number of hours that you work, do you WANT to cut down?
9. Have you taken at least 2 weeks vacation within the last 3 years?
10. Is your time investment out of balance between work, play and love?

If you answered any of these question "yes", then you have a problem managing time and stress effectively.

HOW TO IMPROVE YOUR DELEGATION

1. What details take up most of my time?

2. What parts of my job am I most qualified to handle?

3. What parts of my job am I least qualified to handle?

4. In what aspects of the department's/unit's activities do particular subordinates need strengthening?

5. What delegable tasks would be most appropriate from a development standpoint?

6. What operations that I handle myself would be hampered in the event of my absence?

DELEGATION INVENTORY

Do you delegate as much as you should?

	YES	NO
1. Do you feel it's a sign of weakness to need subordinates' assistance to keep up with your work?		
2. Do subordinates often interrupt you for help and advice?		
3. Do most of them feel they should bring problems to you rather than make decisions themselves?		
4. Do you spend part of your working day doing things for others that they could do themselves?		
5. Do you reserve those details for yourself that you particularly enjoy, even though someone else could do them?		
6. Is as much of your time spent on details as on planning and supervising?		
7. Do you feel you must keep a close tab on details to have a job done right?		
8. Do you lack confidence in subordinates -- i.e. are you afraid to risk giving them more responsibility?		
9. Are you a perfectionist about details that do not affect the final outcome of a project?		
10. In delegating a job, do you often withhold full job information?		
11. After delegating a project, do you grow apprehensive and hover over the subordinate who's doing the job?		

WHEN TO DELEGATE

1. When the supervisor can use more time for work only s/he can do, work that will contribute more to departmental productivity than the work s/he will delegate.

2. When delegating a job to a given employee will help his/her morale and cause the employee to perform closer to his/her potential.

3. When it will not show undue favoritism or seriously damage human relationships.

4. When the supervisor is willing to take the time and make the effort to do a skillful job of delegating.

5. When the supervisor is under pressure and must get out from under some responsibilities in order to protect his/her own physical and mental health.

HOW TO DELEGATE

1. Delegate skillfully
   a. Give clear instructions
   b. Define objectives
   c. Offer as many suggestions on approaches, tools and information sources as are needed at the outset
2. Maintain control
   a. Establish followup checkpoints
   b. Get periodic followup reports on longer term assignments
3. Offer a sympathetic ear
   a. But don't volunteer help unless the individual requests it. Assume s/he is trying to define the problem and needs an audience
   b. If the employee is floundering badly, ask several questions that will help him/her lay out the problem clearly and explore all the options by him/herself
4. Don't expect the job to be done exactly as you would have done it
   a. Accept any result that is adequate to satisfy the requirement
   b. Have it redone if need be
   c. NEVER take an assignment back and redo it yourself. It's the employee's problem and the employee has to learn to survive and grow.

SYMPTOMS OF POOR DELEGATION

1. Plans that go astray
2. Overcontrol
3. Undercontrol
4. Constant pressure
5. Fear of spending money
6. Quoting the boss or some other authority
7. Repeated criticism of subordinates

***** GOOD AXIOM *****

IF YOU HAVE AUTHORITY USE IT. IF YOU DON'T GET IT. IF YOU DON'T USE IT OR CAN'T GET IT, YOU AREN'T THE PERSON FOR THE JOB.

PERFORMANCE STANDARD FOR SUPERVISOR: DELEGATION

9 Delegates task to individual which will be slightly beyond their strengths or abilities but within individual's capacity to complete.

EXCELLENT PERFORMANCE

8 Delegates task to strength areas of each person.

"I would like you to do --- because you are excellent at ---".

7 Delegates task to person and defines amount of authority the individual has to carry out task in the future."

"From now on I expect you to complete the task without telling me it has been completed. You are in charge of handling ---."

"From now on I expect you to complete the task and then tell me by the end of the shift how you handled the task."

6 Delegates task, (may) assign(s) checkposts for evaluating progress on completion of task, evaluates over-all completion of task and provides appropriate recognition/reward for task accomplishment.

MINIMUM PERFORMANCE

5 Delegates task directly to individuals/group defining expected outcome/goal, why the task needs to be completed, where resources are available for task completion, in what form task is to be completed (written versus verbal), how task may need to be performed (optional) and when task is to be completed.

"I need you to do --- so that we have the following result because --. You will need to serve the equipment from -- so that the task is completed in --- form by (date)."

4 Delegates task without defining expected outcome/goal, why the task needs to be completed, or when the task needs to be finished.

"I need you to do ---"

3 Delegates task without defining expected outcome and then takes over completing task from the employee because the task was not being completed the way the supervisor expected it to be completed.

POOR PERFORMANCE

2 Delegates task indirectly without defining expected outcome/goal.

"We sure do need to do such and such."

1 Does not delegate tasks but attempts to complete everything him/herself with employees used to only help out.

DELEGATING TO STRENGTHS OF VARIOUS STYLES

ANALYTICAL STYLE

Focuses on information-facts, figures and evaluation of methods/procedures

Style determinants:
Monotone voice - very little variation in pitch--Tends to frown a great deal

Delegate tasks:

1. that involve equipment and where following procedures is important
2. where the quality of the outcome is critical
3. which require detail mindedness
4. which require the asking of questions to obtain detailed information
5. which require evaluation of results (checking)

AMIABLE STYLE

Focuses on relationships and feelings

Style determinants:
Voice characterized by softness--Slow rate of speed when talking--Smiles frequently

Delegate tasks:

1. where patience is needed
2. where listening skill is important
3. where a calming influence is needed due to a very emotional situation
4. which require team work and cooperation
5. where you need people to do things they don't necessarily want to, but will do it for a person they like

DRIVER STYLE

Focuses on goals, efficiency and timing

Style determinants:
Concise style, finishes sentences for others and rapid rate of speed -- Serious

Delegate tasks:

1. where speed and efficiency are needed
2. where there is either time pressure or deadlines
3. where person has to organize things out of chaos
4. where getting a result is important, not necessarily how it is done
5. where personal competence is necessary for task accomplishment

EXPRESSIVE STYLE

Focuses on image and political astuteness

Style determinants:
Over-talks points, great range of voice inflection--Laughs loudly

Delegate tasks:

1. that include sharing information that may provoke anxiety
2. which may be tension producing --will use humor to reduce tension
3. which require setting limits with another strong person
4. where there is a quick pay off
5. where style is more important than substance

Response Sheet

REMEMBER *to rate only 5 dimensions of job maturity and 5 dimensions of Psychological Maturity.*

Your Name _____ Today's Date _____

Employee Name _____

This person ..... in performing this objective

		Major Objectives or Responsibilities					DIMENSIONS	High M4 / Moderate M3 / M2 / Low M1
		1	2	3	4	5		
JOB MATURITY DIMENSIONS	1.						1. Past Job Experience	Has experience relevant to job 8 7 6 5 4 3 2 1 Does not have relevant experience
	2.						2. Job Knowledge	Possesses necessary job knowledge 8 7 6 5 4 3 2 1 Does not have necessary job knowledge
	3.						3. Understanding of Job Requirements	Thoroughly understands what needs to be done 8 7 6 5 4 3 2 1 Has little understanding of what needs to be done
	4.						4. Problem-solving Ability	Can solve problems independently 8 7 6 5 4 3 2 1 Unable to solve problems independently
	5.						5. Ability to Take Responsibility	Can be left alone 8 7 6 5 4 3 2 1 Needs close supervision
	6.						6. Meeting Job Deadlines	Always meets deadlines 8 7 6 5 4 3 2 1 Never finishes a job on schedule
	7.						7. Follow Through	Checks to see that tasks were accomplished 8 7 6 5 4 3 2 1 Seldom bothers to follow-up
							TOTAL JOB MATURITY SCALE	
PSYCHOLOGICAL MATURITY DIMENSIONS	1.						1. Willingness to Take Responsibility	Is very eager 8 7 6 5 4 3 2 1 Is very reluctant
	2.						2. Achievement Motivation	Has a high desire to achieve 8 7 6 5 4 3 2 1 Has little desire to achieve
	3.						3. Commitment	Is very dedicated 8 7 6 5 4 3 2 1 Is uncaring
	4.						4. Persistence	Won't quit until done 8 7 6 5 4 3 2 1 Gives up easily
	5.						5. Work Attitude	Sees work as an enjoyable activity 8 7 6 5 4 3 2 1 Has a "thank goodness it's Friday" attitude
	6.						6. Initiative	Looks for new approaches 8 7 6 5 4 3 2 1 Is content to maintain the "status quo"
	7.						7. Independence	Is willing to work on own 8 7 6 5 4 3 2 1 Is unwilling to work on own
							TOTAL PSYCHOLOGICAL MATURITY SCORE	
SUMMARY							Overall Maturity Designation M1, M2, M3 or M4	
							Appropriate Leadership Style* S1, S2, S3 or S4	

*See page four for Situational Leadership Model

Score Interpretation

What Do the Scores Mean in Terms of Appropriate Leadership Styles?

In order to determine the most appropriate leadership style to use with the individual whose JOB MATURITY and PSYCHOLOGICAL MATURITY you have just rated, please complete the steps outlined below.

1. Use the data matrix below as follows:
   Locate the box which contains the combination of JOB MATURITY and PSYCHOLOGICAL MATURITY scores that you rated the individual on each objective or responsibility. In the lower left hand corner of that box is the individual's overall MATURITY designation for that objective/responsibility. In the upper right hand corner of the box is the high probability leadership style for that MATURITY level. In some of the boxes the maturity level and appropriate leadership style are expressed as a range encompassing a portion between two specific designations.
2. Enter the overall MATURITY and appropriate LEADERSHIP STYLE designations in the Summary area at the bottom of page 2 for each objective or responsibility.

EXAMPLE

Suppose you rated an individual a score of 27 on JOB MATURITY and a score of 24 on PSYCHOLOGICAL MATURITY for a particular objective. According to the data matrix, this individual's overall MATURITY for that objective would be M3, and the most appropriate leadership style to be used with this person would be S3—participating (High Relationship Behavior/Low Task Behavior).

DATA MATRIX

PSYCHOLOGICAL MATURITY	M1	M2	M3	M4
M4	S2 Job 5 to 12 Psy 33 to 40 M2	S2/3 Job 13 to 22 Psy 33 to 40 M2/3	S3/4 Job 23 to 32 Psy 33 to 40 M3/4	S4 Job 33 to 40 Psy 33 to 40 M4
M3	S2 Job 5 to 12 Psy 23 to 32 M2	S2/3 Job 13 to 22 Psy 23 to 32 M2/3	S3 Job 23 to 32 Psy 23 to 32 M3	S3/4 Job 33 to 40 Psy 23 to 32 M3/4
M2	S1/2 Job 5 to 12 Psy 13 to 22 M1/2	S2 Job 13 to 22 Psy 13 to 22 M2	S2/3 Job 23 to 32 Psy 13 to 22 M2/3	S2/3 Job 33 to 40 Psy 13 to 22 M2/3
M1	S1 Job 5 to 12 Psy 5 to 12 M1	S1/2 Job 13 to 22 Psy 5 to 12 M1/2	S2 Job 23 to 32 Psy 5 to 12 M2	S2 Job 33 to 40 Psy 5 to 12 M2

JOB MATURITY

DIRECTIONS: Circle the appropriate number, or fill in the information requested.

1. This workshop met my needs:

   1 Not at all

   2 Somewhat

   3 Average

   4 Well

   5 Very Well

2. I found the following topic or activity to be the most valuable:

   _____

   _____

3. I found the following topic or activity to be the least valuable:

   _____

   _____

   What recommendations would you make to improve the topic or activity you described as least valuable?

   _____

   _____

4. What is your reaction to the training materials?

   1 I'll share this with other staff.

   2 This is good resource material and may work.

   3 I'm not sure how helpful this will be, and don't know if I will use it.

   4 I'll never use this information.

   General comments about training materials:_____

   _____

   _____

5. What types or styles of training methods did you find most useful during this training? (Check only two)

1	Lecture	5	Panel presentation
2	Small Groups	6	Question and answer period
3	Large groups	7	Simulation experience
4	Role playing	8	Inventories

Comments _____

_____

6. Has your knowledge of the training topic(s) increased as a result of your participation in this workshop?

1 Yes

2 No

3 Undecided

7. Will your job performance change in any way as a result of this training experience?

1 Yes

2 No

3 Somewhat

8. Indicate how you think your job performance will change as a result of this training program:

_____

_____

_____

9. Please rate how well you feel the following objectives were accomplished:

A Identify your own areas of poor time management:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

B Apply management techniques to one particular "time waster" in your own work environment:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very well

C Determine how to select which tasks should be delegated and to whom:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very Well

D Choose the leadership style which will facilitate one employee's performance on one delegated task:

1 Not at all

2 Somewhat

3 Average

4 Well

5 Very Well

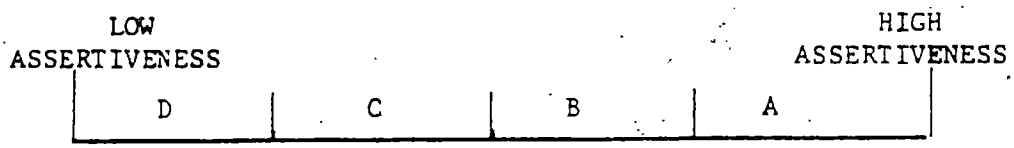
My personal goals for using the information presented on the topic of Time Management are:

1.

2.

3.

Signed: _____



LOW ASSERTIVENESS BEHAVIOR:
Easygoing, he/she likes to be unimposing with others. He/she asks questions and listens -- but may not talk unless he/she has a specific reason to do so.

HIGH ASSERTIVENESS BEHAVIOR:
Ambitious, she/he likes to know what is going on and takes action to find out. She/he talks a lot with others -- even when it may not be her/his business to do so.

LOW RESPONSIVENESS

1

LOW RESPONSIVE BEHAVIOR: Self-sufficient, independe of others, tends to be formal, controlled and cautious with his/her feelings.

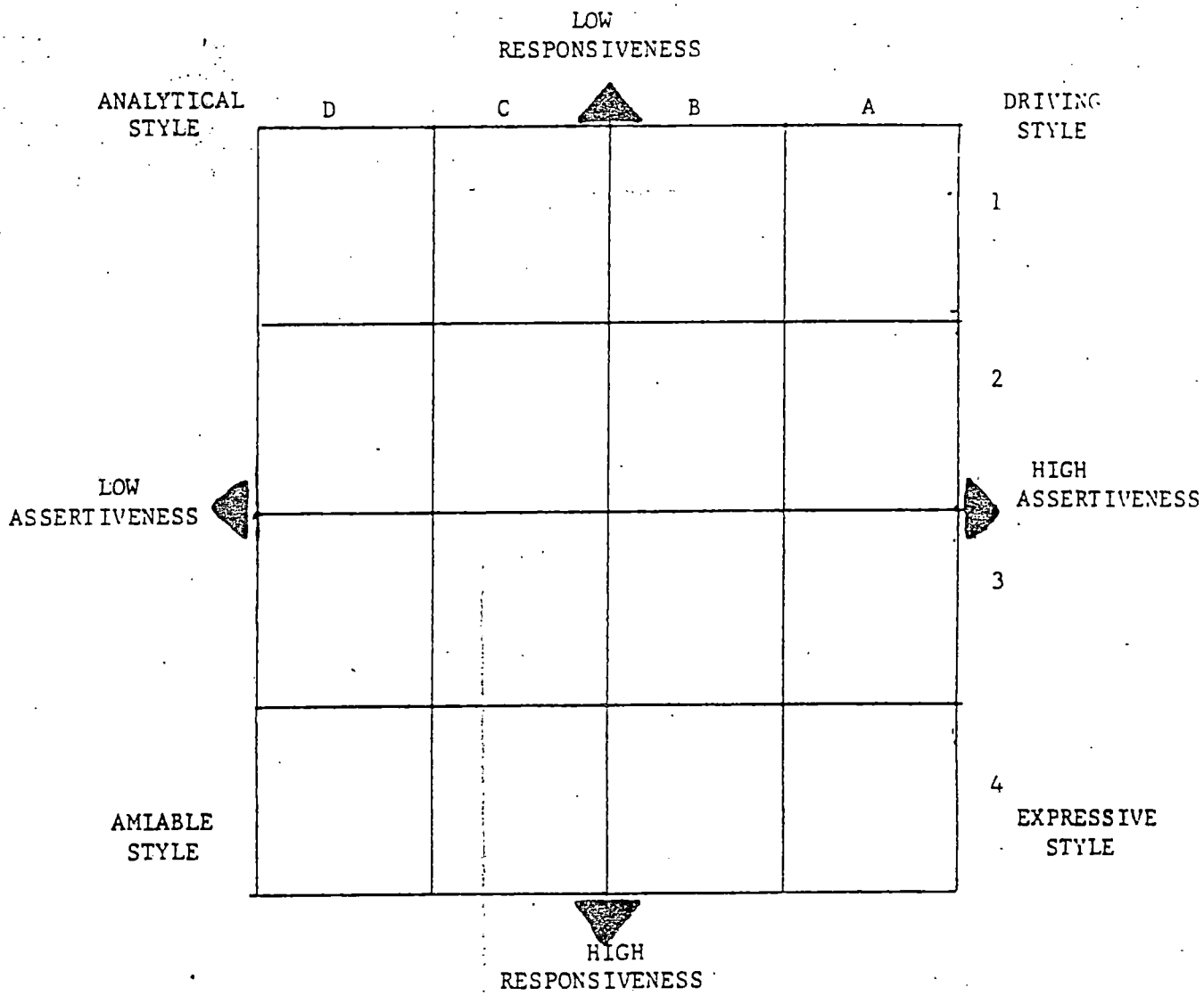
2

HIGH RESPONSIVENESS

3

HIGH RESPONSIVE BEHAVIOR Reacts readily to influences, appeals or stimulation, emotional, expresses feelings.

4



My personal goals for using the information presented on the topic of assertiveness are:

1. learn to set limits
2. Control aggressiveness
3.

Signed: _____

Lex Frieden

Lex Frieden

TIRR THE INSTITUTE FOR REHABILITATION AND RESEARCH
in the Texas Medical Center / 1333 Moursund Avenue / Houston, Texas 77030 / (713) 797-1440

M E M O R A N D U M

To: Supervisory Skills Participants

From: Margaret Watson, Staff Development Coordinator

Re: Session #3

Date: April 13, 1981

Enclosed is the material describing the third session of Supervisory Skills - Dynamic Leadership. It would be helpful if you could read through this before your session on May 27, 1981. The cover information describes what we will actually be doing during the session as well as what your "homework" assignment will be. BE SURE TO BRING THIS PACKET WITH YOU ON MAY 27.

See you then.

A voluntary, not-for-profit hospital for restorative medicine serving the disabled through care, research and education.

Services Offered: Early restorative medical care, comprehensive rehabilitation, surgical restoration, diagnostic evaluation and planning, independent living services, vocational evaluation, training, placement, sheltered employment.

SEATING ARRANGEMENT FOR THE THIRD SESSION - DYNAMIC LEADERSHIP

Table 1

1. Laverne Hurston
2. Kathleen Jones
3. Betty Wall
4. Krisy Davidson
5. Lourdes Cuellar
6. Marci Jackson
7. Kathryn Doeschot
8. John Legunas

Table 2

1. Sue Axel
2. Carnel Rocco
3. Ann Worthy
4. Eleanore Grefe
5. Besty Martin
6. Barbara Vaughn
7. Carlos Guillory
8. Ruby Davis

Table 3

1. Michael White
2. Johnnie Mitchell
3. Diane Atkins
4. Elizabeth Meadows
5. Geneva Johnson
6. Mary Moore
7. Carol Campbell
8. Jane Fisher

Table 4

1. Jean Johnston
2. Linda Brightman
3. Caren Zatlin
4. Mildred Branner
5. Lynda Collins
6. Cindy Monroe
7. Beverly Koch
8. Harlan Brown

Table 5

1. Milli Patti
2. Regina Piece
3. Joe Syon
4. Mary Sawyer
5. Jean Cole
6. Lillian Thomas
7. Gloria Tavis

Table 6

1. Rick Keniston
2. Effie LaMothe
3. Marie Puryear
4. Marilyn Emerich
5. Lida Dahm
6. Collen Caswell
7. Laura Campion

Table 7

1. Judy Findlay
2. Diane Clark
3. Saramma Ninan
4. Gordon Stanley
5. Paul Guillete
6. Relia Scott
7. Ann Gutierrez

Table 8

1. Lex Frieden
2. Ruby Banks
3. Diana Bertrand
4. John Fletcher
5. Marcia Sanderson
6. Mildred Johnson
7. Betty Olson

Topic: Dynamic Leadership

Description: This session is designed to assist participants in identifying:

1. four styles of leadership;
2. an employee's task relevant maturity level;
3. employees who are in a growth and developmental cycle; and
4. employees who are in a regressive cycle.

Rationale: The way in which a department functions is, in many ways, dependent upon the leadership style(s) of the department head and staff supervisors. Maximum departmental functioning can only be achieved when these individuals are able to vary their styles of leadership commensurate with particular situations. This skill is based upon an individual's familiarity with the various leadership styles and the appropriate use of each. This course provides participants with the background knowledge and simulation activities necessary for developing these skills.

Performance Objectives: Upon completion of the session, participants will:

- Be able to identify their own range of leadership styles
- Be able to identify the task maturity level of one employee
- Be able to describe the growth and development cycle and the regressive cycle
- Have participated in the simulation exercise

Advance organizer for presentation:

1. Define four styles of leadership.
2. Discuss situations in which each style is appropriate.
3. Determine the task relevant maturity level of employees.
4. Recognize the growth and development cycle and the regressive cycle.

Instructional Methods:

1. Lecture/discussion
2. Simulation

Learning Activities:

1. Complete Leadership Styles Inventory
2. List situations where particular styles are appropriate.
3. Rate an employee's task relevant maturity level.
4. Simulation

Between Session Assignment: Participants will bring to session 4 a written description of:

1. a situation in which the most appropriate leadership style was not used by the participant, and
2. an appropriate use of one of the participant's least preferred styles.

INDICATORS OF INCREASING MATURITY LEVELS

CHANGES in Behavior From:

(1) passive to active

(2) dependent to independent

(3) ability to behave in few ways to ability to perform in many ways

(4) short-time perspective to long time perspective

(5) subordinate to equal position

(6) lack of awareness and control of self to awareness and control of self

1

SITUATION

Your subordinates are not responding lately to your friendly conversation and obvious concern for their welfare. Their performance is in a tailspin.

ALTERNATIVE ACTIONS

A. Emphasize the use of uniform procedures and the necessity for task accomplishment.
B. Make yourself available for discussion but don't push.
C. Talk with subordinates and then set goals.
D. Intentionally do not intervene.

2

SITUATION

The observable performance of your group is increasing. You have been making sure that all members were aware of their roles and standards.

ALTERNATIVE ACTIONS

A. Engage in friendly interaction, but continue to make sure that all members are aware of their roles and standards.
B. Take no definite action.
C. Do what you can to make the group feel important and involved.
D. Emphasize the importance of deadlines and tasks.

3

SITUATION

Members of your group are unable to solve a problem themselves. You have normally left them alone. Group performance and interpersonal relations have been good.

ALTERNATIVE ACTIONS

A. Involve the group and together engage in problem-solving.
B. Let the group work it out.
C. Act quickly and firmly to correct and redirect.
D. Encourage group to work on problem and be available for discussion.

4

SITUATION

You are considering a major change. Your subordinates have a fine record of accomplishment. They respect the need for change.

ALTERNATIVE ACTIONS

A. Allow group involvement in developing the change, but don't push.
B. Announce changes and then implement with close supervision.
C. Allow group to formulate its own direction.
D. Incorporate group recommendations, but you direct the change.

5

SITUATION

The performance of your group has been dropping during the last few months. Members have been unconcerned with meeting objectives. Redefining roles has helped in the past. They have continually needed reminding to have their tasks done on time.

ALTERNATIVE ACTIONS

A. Allow group to formulate its own direction.
B. Incorporate group recommendations, but see that objectives are met.
C. Redefine goals and supervise carefully.
D. Allow group involvement in setting goals, but don't push.

6

SITUATION

You stepped into an efficiently run situation. The previous administrator ran a tight ship. You want to maintain a productive situation, but would like to begin humanizing the enviroment.

ALTERNATIVE ACTIONS

A. Do what you can to make group feel important and involved.
B. Emphasize the importance of deadlines and tasks.
C. Intentionally do not intervene.
D. Get group involved in decision-making, but see that objectives are met.

7

SITUATION

You are considering major changes in your organizational structure. Members of the group have made suggestions about needed change. The group has demonstrated flexibility in its day-to-day operations.

ALTERNATIVE ACTIONS

A. Define the change and supervise carefully.
B. Acquire group's approval on the change and allow members to organize the implementation.
C. Be willing to make changes as recommended, but maintain control of implementation.
D. Avoid confrontation; leave things alone.

8

SITUATION

Group performance and interpersonal relations are good. You feel somewhat unsure about your lack of direction of the group.

ALTERNATIVE ACTIONS

A. Leave the group alone.
B. Discuss the situation with the group and then initiate necessary changes.
C. Take steps to direct subordinates toward working in a well-defined manner.
D. Be careful of hurting boss-subordinate relations by being too directive.

9

SITUATION

Your superior has appointed you to head a task force that is far overdue in making requested recommendations for change. The group is not clear on its goals. Attendance at sessions has been poor. Their meetings have turned into social gathering. Potentially they have the talent necessary to help.

ALTERNATIVE ACTIONS

A. Let the group work it out.
B. Incorporate group recommendations, but see that objectives are met.
C. Redefine goals and supervise carefully.
D. Allow group involvement in setting goals, but don't push.

10

SITUATION

Your subordinates, usually able to take responsibility, are not responding to your recent redefining of standards.

ALTERNATIVE ACTIONS

A. Allow group involvement in redefining standards, but don't push.
B. Redefine standards and supervise carefully.
C. Avoid confrontation by not applying pressure.
D. Incorporate group recommendations, but see that new standards are met.

11

SITUATION

You have been promoted to a new position. The previous supervisor was uninvolved in the affairs of the group. The group has adequately handled its tasks and direction. Group inter-relations are good.

ALTERNATIVE ACTIONS

A. Take steps to direct subordinates toward working in a well-defined manner.
B. Involve subordinates in decision-making and reinforce good contributions.
C. Discuss past performance with group and then you examine the need for new practices.
D. Continue to leave group alone.

12

SITUATION

Recent information indicates some internal difficulties among subordinates. The group has a remarkable record of accomplishment. Members have effectively maintained long range goals. They have worked in harmony for the past year. All are well qualified for the task.

ALTERNATIVE ACTIONS

A. Try out your solution with subordinates and examine the need for new practices.
B. Allow group members to work it out themselves.
C. Act quickly and firmly to correct and redirect.
D. Make yourself available for discussion, but be careful of hurting boss-subordinate relations.

DIRECTIONS FOR SCORING

Circle the letter that you have chosen for each situation on the same line to the right, under Column I (STYLE RANGE) and also Column II (STYLE ADAPTABILITY). After you have circled alternative actions, total the number of circles for each sub-column under Column I (STYLE RANGE) and Column II (STYLE ADAPTABILITY) and enter totals in the spaces provided below.

SITUATIONS	COLUMN I (Style Range) Alternative Actions				COLUMN II (Style Adaptability) Alternative Actions			
	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)
1	A	C	B	D	D	B	C	A
2	D	A	C	B	B	D	C	A
3	C	A	D	B	C	B	A	D
4	B	D	A	C	B	D	A	C
5	C	B	D	A	A	D	B	C
6	B	D	A	C	C	A	B	D
7	A	C	B	D	A	C	D	B
8	C	B	D	A	C	B	D	A
9	C	B	D	A	A	D	B	C
10	B	D	A	C	B	C	A	D
11	A	C	B	D	A	C	D	B
12	C	A	D	B	C	A	D	B
Sub-columns	(1)	(2)	(3)	(4)	(a)	(b)	(c)	(d)

Multiply by:			
(a) -2	(b) -1	(c) +1	(d) +2

	+		+		+		=	TOTAL

TASK BEHAVIOR AND RELATIONSHIP BEHAVIOR DEFINED

Task behavior - The extent to which a leader is likely to:

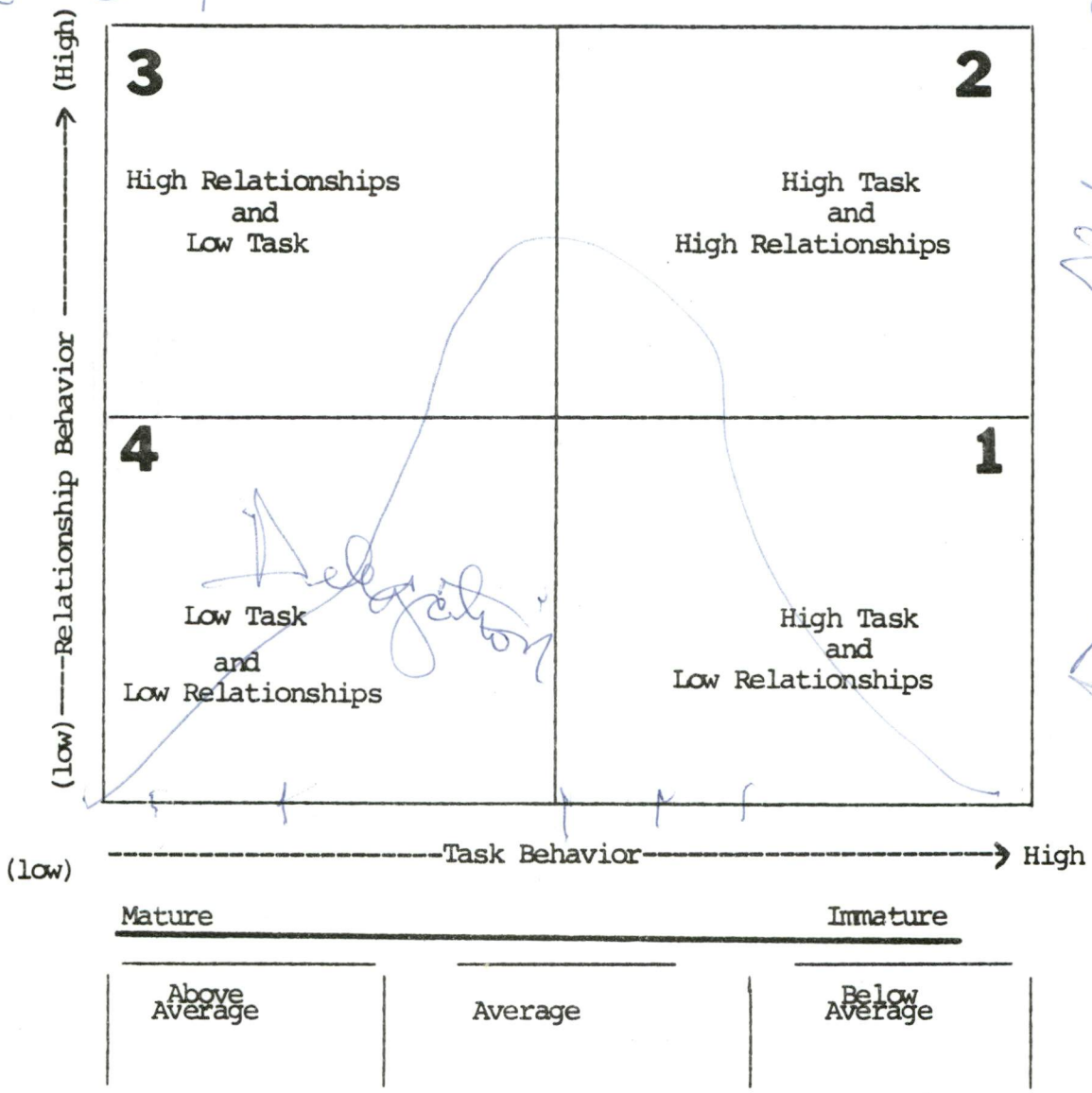
organize and define roles of the members of the group;
explain what activities each is to do and when, where, and how tasks are to be accomplished;
characterized by endeavoring to establish well-defined patterns of organization, channels of communication, and ways of getting jobs accomplished.

Relationship behavior - The extent to which a leader is likely to:

maintain personal relationships between him/herself and the members of the group by opening up channels of communication, delegating responsibility, giving subordinates an opportunity to use their potential;
characterized by socioemotional support, friendship, and mutual trust.

LIFE CYCLE LEADERSHIP THEORY

EFFECTIVE STYLES



Mature ——————————————— Immature

Above Average	Average	Below Average

Maturity is defined in Life Cycle Theory as:

1. the level of Achievement Motivation
2. Responsibility
   a. willingness
   b. ability
3. Task relevant education and experience

EFFECTIVE AND INEFFECTIVE USE OF LEADERSHIP STYLES

Basic Styles	Effective	Ineffective
High Task and Low Relationships	Seen as knowing what they want and imposing their methods for accomplishing this without creating resentment.	Seen as having no confidence in others, unpleasant, and interested only in short-run output.
High Task and High Relationships	Seen as satisfying the needs of the group for setting goals and organizing work, but also providing high levels of socioemotional support.	Seen as initiating more structure than is needed by the group and spends more time on socioemotional support than necessary.
High Relationships and Low Task	Seen as having implicit trust in people and as being primarily concerned with developing their talents.	Seen as primarily interested in harmony and being seen as "a good person," and being unwilling to risk disruption of a relationship to accomplish a task.
Low Task and Low Relationships	Seen as appropriately permitting subordinates to decide how the work should be done and playing only a minor part in their social interaction.	Seen as uninvolved and passive, as a "paper shuffler," who cares little about the task at hand or the people involved.

JOBS REQUIRING LOW OR HIGH LEADERSHIP STYLE RANGE

Low Flexibility Demands	High Flexibility Demands
Low-level managerial jobs	High-level managerial jobs
Simple managerial jobs	Complex managerial jobs
Established goals	Emerging goals
Tight procedures	Fluid procedures
Established tasks	Unstructured tasks
Routine, automated, decision-making	Nonroutine decision-making
Little environmental change	Rapid environmental change
Manager has complete power	Manager does not have complete power
Following plans essential	Using initiative essential
Manager accepted or rejected by subordinates	Subordinates neutral to manager
Few interconnecting jobs	Many interconnecting jobs

TASK RELEVANT MATURITY

High Task Relevant Maturity Characteristics	Low Task Relevant Maturity Characteristics
Independent	Dependent
Active	Passive
Behaves in many ways	Behaves in few ways
Other directed	Inner directed
Long time perspective	Short time perspective

Topic: Assertiveness

Description: This section is designed to assist participants in identifying:

a. non-assertive, aggressive and assertive behavior;
b. the various levels of assertive behaviors; and
c. how to set limits.

Rationale: One of the most important aspects of overall organizational efficiency and spirit is the ability of its employees to behave and communicate assertively. This skill is based on the individual's ability to see the difference in non-assertive, aggressive and assertive behaviors, how and when to use various levels of assertive behavior, and the effects of each of these responses on the individuals involved and, therefore, the organization. This course provides a framework for understanding these issues and an opportunity to practice appropriate responses to various situations.

Performance Objective: Upon completion of the session, participants will be able to:

- Identify their own range of non-assertive, aggressive and assertive behaviors
- State the verbal, non-verbal, emotional and physiological characteristics of non-assertive, aggressive and assertive behaviors
- List levels of muscle for assertive behavior
- Demonstrate techniques for responding assertively to various situations

Advance organizer for presentation:

1. Define range of non-assertive, aggressive and assertive behavior
2. Verbal, non-verbal, emotional and physiological characteristics of each
3. Specific assertiveness skills (broken record & fogging)
4. Types of criticism and assertive responses
5. Setting limits

Instructional Methods:

1. Lecture/discussion
2. Role playing

Assertiveness, Cont.

Learning Activities

1. Complete the Assertive/Aggressive Inventory
2. Role play use of broken record and fogging
3. Role play responses to criticism
4. Complete assertiveness analysis

Between Session Assignment: Participants will practice using assertiveness skills in a situation that recurs frequently in which assertive behavior is needed.

EVERYONE'S BILL OF RIGHTS

(1) The right to judge your own behavior, thoughts, and emotions and to take the responsibility for their initiation and consequences upon yourself.

(2) The right to offer no reason or excuses justifying your behavior.

(3) The right to be listened to and taken seriously.

(4) The right to set your own priorities.

(5) The right to say no without feeling guilty.

(6) The right to ask for what you want.

(7) The right to get what you pay for.

(8) The right to ask for information from professionals.

(9) The right to make mistakes and be responsible for them.

(10) The right to judge if you are responsible for finding solutions to other people's problems.

(11) The right to be independent of the goodwill of others.

(12) The right to be illogical in making decisions.

(13) The right to say, "I don't care, I don't know or I don't understand."

(14) The right to choose not to assert yourself.

SELF ASSERTIVENESS GUIDE

These questions will help you to look at your own self assertiveness. There are no "right" answers. How well you do depends on your own standards. The real question is: How do you feel about the way you handle these situations.

____ (1) Do you usually have confidence in your own judgment?

____ (2) Do you speak out in protest when someone takes your place in line?

____ (3) Are you openly critical of others' ideas, opinions and behavior?

____ (4) Do you insist that your spouse or roommate take on a fair share of household chores?

____ (5) When a latecomer is waited on before you are, do you call attention to the situation?

____ (6) Are you reluctant to speak up in a discussion?

____ (7) Do you continue to pursue an argument after the other person has had enough?

____ (8) Are you disturbed if someone watches you at work?

____ (9) If someone keeps kicking or bumping your chair in a movie or lecture, do you ask the person to stop?

____(10) Do you find it difficult to maintain eye contact when talking to another person?

____(11) In a restaurant, when your meal is improperly prepared or served, do you ask the waiter/waitress to correct the situation?

____(12) Do you often step in and make decisions for others?

____(13) Are you able to ask your friends for small favors or help?

____(14) Do you think you always have the right answer?

____(15) When you differ from a person you respect, do you speak up for your own viewpoint?

____(16) Do you have difficulty praising or complimenting others?

____(17) If you are disturbed by someone smoking, do you say so?

____(18) Are you able to refuse requests made by friends?

____(19) Do you finish other people sentences for them?

____(20) When you meet a stranger, are you the first to introduce yourself and begin a conversation?

____(21) At family meals, do you control the conversation?

Remember there is no single way one must act in a specific situation. The hope is that you can choose for yourself how you will act and not be manipulated by circumstances or people.

Urban record — sophisticated technique

Dogma — acknowledge probability of wrongdoing while deciding what to do.

Com U.T.I.

You should've been talked to him about that.

1

6. One of your associates continually interrupts and appears not to be listening to what you are saying. You feel angry. You...
   ____ T point out that he has been doing this a lot lately and tell him you are angry about it.
   ____ S complain about the interruptions, but do not admit your anger.
   ____ M do not say anything about this because you don't want to hurt his/her feelings.
   ____ D tell him he/she would learn more if he listed more.
   ____ N jokingly comment that it must be difficult for him/her to carry the full burden of the conversation.

7. You are upset because someone in administration is rude to you in the fulfillment of his/her official duties. You...
   ____ M say nothing, even though you are upset, because you realize the official's job is a difficult one.
   ____ D tell the official her/his rudeness is uncalled for.
   ____ T let the official know that you are upset by his/her rude behavior.
   ____ N tell the official he/she makes you feel bad and you don't deserve this treatment.
   ____ S say nothing.

8. You are engaged in a project with co-worker and must prepare a joint report. When you discuss the report, your co-worker suggests that you do most of the work because he/she is not good at that sort of thing. You...
   ____ T insist that he/she do his fair share.
   ____ N jokingly suggest he/she is shirking his responsibility.
   ____ M agree to do most of the work because you really enjoy the work as well as helping your co-worker.
   ____ S agree to do most of the work yourself.
   ____ D tell your friend that it is irresponsible for him/her not to do her/his share of the work.

9. A friend asks you to accept a gift you do not want. You...
   ____ S accept the gift but feel somewhat uncomfortable about doing so.
   ____ N accept the gift but indicate you really don't want it.
   ____ M accept the gift in order to save your friend embarrassment.
   ____ D do not accept the gift.
   ____ T thank the person for offering you the gift, but indicate why you cannot accept it.

10. You are reading in the library. A couple of people are talking nearby and are interfering with your concentration. You...
   ____ N clear your throat and give them a menacing look, but say nothing.
   ____ S get up and move to another location.
   ____ T ask them to please be a little quieter.
   ____ D loudly tell them to be quiet.
   ____ M recognize that they are having a good time and try to concentrate in spite of the noise.

11. A co-worker indulges in loud gum-chewing all day long every day. This is getting on your nerves. You...
   ____ M ignore co-worker since gum-chewing is a good release for tension.
   ____ D tell her/him to stop chewing gum.
   ____ T ask her/him politely to please chew more quietly.
   ____ N tease her/him about the constant chewing.
   ____ S move to the next office.

12. You are in a hurry and have been waiting in the grocery check-out line for five minutes. A slight acquaintance asks if she/he can cut ahead of you. You...

___T refuse the person's request and point out that you are in a hurry.
___S reluctantly allow him/her to cut in.
___M allow him/her to cut in ahead of you in order to save her/him from embarrassment.
___N make a comment about people who cut ahead in line.
___D insist that he/she move to the back like everyone else.

13. You and your family are trying to have a quiet evening at home. However, the people who live in the apartment next to yours have their stereo turned up quite loudly. You...

___T call them on the phone and ask that they turn the music down.
___M try to ignore the loud music since they have a right to enjoy themselves.
___D knock on their door and tell them they are inconsiderate.
___N turn up your TV or stero.
___S Go out for the evening.

14. Your friend used to see you very often but has not been seeing you as often lately for no apparent reason. You feel emotionally involved with this person and would like to know where you stand. You...

___T tell your friend you are feeling uneasy and would like to know his/her feelings toward you.
___N tell your friend that he/she should see you more often.
___S wait for your friend to mention it.
___D tell your friend that this is no way to treat a close friend.

15. You are at a lecture with a friend and the speaker makes a statement that you believe is complete erroneous. You have the facts at hand with which you can disprove his/her statement. You...

___N say nothing to the speaker, but remark audibly to your friend that statement is erroneous.
___T present your views during the question-and-answer period.
___D immediately remark that his/her statement was erroneous.
___S **say nothing to the speaker or your friend.**
___M **realize he/she is wrong, but overlook the statement since she/he must have good reasons for making it.**

#6 I no response

TOTAL NUMBER FOR EACH OF THE RESPONSES:

S = N =

T = 14

M = D =

S & D caused by fear

In what situations do you tend to be toward the non-assertive side or toward the aggressive side?

S submissive N-hostility
M complaint D aggressive
T assertive

ASSERTIVE ANALYSIS

CATEGORY	Positive Feelings	Negative Feelings	Setting Limits	Self Initiation
Strangers	2	2	1	1
People in authority	1	2	2	1
People older than I	1	1	2	2
Physicians	2	2	2	2
My boss or supervisor	1	2	3	2
Members of the opposite sex	1	1	2	1
My partner, my spouse	1	2	1	1
My father	2	3	1	2
My mother	2	2	1	1
People I supervise	1	2	2	1
Teenagers	2	1	2	2
My children	3	2	2	2
People with more education than I	1	1	2	1
Others(people I respect, etc)	2	1	2	1
Difficulty factor =	22	23	26	20

1 = easy 2= moderate difficulty or difficult in some situations 3 = Difficult

Tony Broken Record

NON-ASSERTIVE BEHAVIOR:	ASSSERTIVE BEHAVIOR:	AGGRESSIVE BEHAVIOR:
Behaviors	Behaviors	Behaviors
Self-denying	Self-enhancing	Self-enhancing at expense of another
Inhibited fear/anxiety/guilt depression/fatigue/ nervousness	Expressive Dealing with emotions as they occur	Externalize "Secondary" to fear/guilt/hurt or build-up to inappropriate anger/hate or misplaced hostility
Temperature below normal Not verbally expressed	Temperature normal Tone normal	Temperature above normal Expressed loudly and explosively
Non-verbal:	Non-verbal:	Non-verbal:
Downcast eyes Shifting of weight/ slumped body Wringing of hands Whining/hesitant/ giggly voice	Good eye contact Stand comfortably but firmly on two feet Hands loosely at sides Strong, steady tone of voice	Glaring eyes Leaning forward Finger-pointing Raised/snickering/haughty tone of voice
Means of dealing:	Means of dealing:	Means of dealing:
Hidden bargains Manipulation (guilt,etc.) Retreating, giving up Feels depreciated	Confronting Honesty Direct Feels good about self and actions	Tirades Put-downs Cutting remarks Feels hurt, humiliated, defensive
Results in:	Results in:	Results in:
Higher stress Depreciates self Allows others to choose Does not achieve desired goal	Lower stress Feels good about self Chooses for self May achieve desired goal	Higher stress Depreciates others Chooses for others Achieves desired goal by hurting
Goal:	Goal:	Goal:
Appease others; avoid conflict	Communicate mutuality Give & get respect Allow room for workable compromise	Control others
Physiological:	Physiological:	Physiological:
G.I. track hemorrhoids	high level wellness	Type A heart attacks ulcers strokes

assertiveness may turn to aggressiveness if not careful

DIRECT ASSERTIVE STATEMENTS

POSITIVE FEELINGS:

I like the way you did that
I want you to know how much I enjoyed this meeting
I think that Linda deserves a promotion. Her work is outstanding and goes far beyond her present position
I like the way you handled that.

SELF INITIATION:

I want more information about this prescription.
What is your fee?
I would like to bring up something that bothering me. I feel some people are doing more work than others.
I'm starting to do something positive with the rest of my life and I'm starting now.

LIMIT SETTING:

I'd rather not answer that.
That is not one of my priorities.
Sexist language bothers me. I don't want to hear it.
I would like to be alone tonight.
I don't doubt your concern, but I want to make my own decision.
That's not my responsibility. Please find someone else to take care of it.
Thanks, but I don't need any help.
I wish you wouldn't make commitments for me.
I'ld rather talk a little later. Right now, I need to collect my thoughts.
I'ld appreciate your not smoking.
I would like to think further about that before deciding what to do.

NEGATIVE FEELINGS:

I resent your not showing up on time.
I don't agree with you.
I want you to stop that. I don't like what you are doing.
The project that you just completed for me is not what I'ld hoped for.
I feel put down by comments like that.
I am annoyed that you want me to make an exception for you.
I am not satisfied with the work done on my car. I would like you to correct it without charge.
I don't like you taking that book off my desk without asking.

LEVELS OF ASSERTIVENESS

INCIDENT: SOMEONE KICKING THE BACK OF YOUR CHAIR INCIDENT:_____

AGGRESSIVE LEVEL High Verbal
High Non-Verbal

"You're inconsiderate and rude. Don't you have any manners? Stop kicking my chair with your feet!"

LEVEL IV CARRYING OUT CONSEQUENCE LEVEL

"Usher, will you please help me?"

LEVEL III CONSEQUENCE OF PERSON'S ACTION LEVEL

"If you kick my chair again, I'm going to call the usher."

LEVEL II REQUEST LEVEL

"I'm serious, don't kick my chair."

LEVEL I POLITENESS LEVEL

"Would you mind not kicking my chair, it's bothering me."

PASSIVE LEVEL

Low Verbal
High Non-Verbal

Dirty look. Silent.

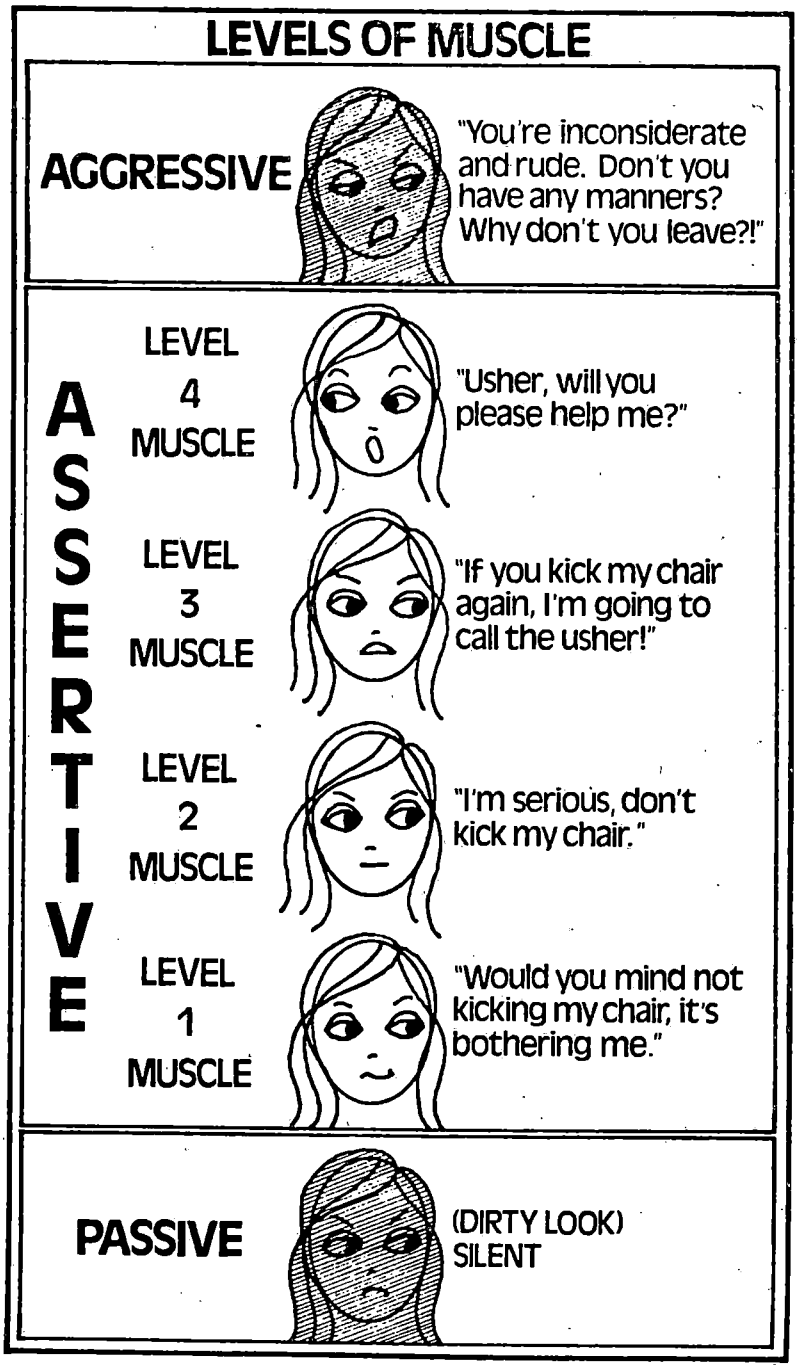


FIGURE 7.2 Without being either passive or aggressive, a woman has a wide range of responses available to her. Different muscle levels allow her to fit her response to the intensity of the situation.

GUIDELINES FOR ASSERTIVE BEHAVIOR

(1) Concentrate on a particular situation. Spend a few minutes imagining how you handle a specific situation (being shortchanged, being unfairly critized at work, being blamed for something that wasn't your fault, sitting in a meeting that is of no benefit or drags on and on). Imagine the actual details. Include your feelings at the time and afterward.

(2) Review your reactions. Write down your behavior using the following elements of assertiveness: eye contact, body posture, gestures, facial expression, voice, timing fluency and message content. Look at the elements of your behavior in the recalled situations. Note your strengths, elements of non-assertive behavior, and elements of aggressive behavior.

(3) Observe an effective model - someone who handles the same situation very well. Watch their use of the elements of assertiveness and their style - the words they use are less important.

(4) Consider alternative responses. What other ways could the situation be handled? Could you deal with it more to your advantage? less offensively?

(5) Visualize yourself dealing effectively with the situation. You may act like your "model" or differently. Be assertive, but be as natural as you can. Repeat this step until you can imagine a comfortable style for yourself which succeeds in handling the situation effectively.

(6) Try it out.

(7) Note the strengths of your performance and work to improve the weak areas. Get self-reinforcement - compliment yourself the areas handled well.

MANIPULATION

According to Piaget, one manipulative approach is the use of particular phases that actually mean the opposite of what they say. These are designed to allow the manipulator to avoid taking responsibility.

Red Flag Words	Often Really Means
"I don't know."	"I really do know but I don't want to take responsibility for it."
"I can't."	"I won't."
"I'll try."	"I won't."
"I should."	"I don't want to."

Why Question	Really Means
"Why were you so late?"	"I don't think you should have been so late."
"Why can't you keep your room clean?"	"I don't think you should leave your room so messy."
"Why were you so rude with me?"	"I don't think you should be so rude with me."

Additional Deceptive Questions	Really Means
(A parent knowing the daughter/ son has not taken the garbage but yet):	
"Have you taken out the garbage?"	"I want you to take out the garbage."
(A spouse, knowing the other has not called the restaurant to make dinner reservations):	
"Have you called the restaurant for reservations?"	"I want you to call the restaurant to make dinner reservations."

CASE EXAMPLES

LATE

One of your staff has been coming in late for the last 3-4 days.

Alternative Responses:

Non-Assertive:

Aggressive:

Assertive:

PAST MIDNIGHT

Your teenaged daughter has just returned from a school party. It's 2 o'clock in the morning and you have been frantic because you expected her home by midnight.

Alternative Responses:

Non-Assertive:

Aggressive:

Assertive:

CASE EXAMPLES

JOB ERROR

You have made an error on some minor aspect of your job. Your superior discovers it and is letting you know rather harshly that you should not have been so careless.

Alternative Responses:

Non-Assertive:

Aggressive:

Assertive:

JOB INTERVIEW

You are at a job interview and the interviewer is about to end the interview without giving you a chance to have some of your concerns about the job answered. The interviewer says "Well, I guess that's it. I'll let you know what we decide about you."

Alternative responses:

Non-Assertive:

Aggressive:

Assertive:

My personal goals for using the information presented on the topic of communication are:

1. communicating better with my staff
2. " " wife
3. improving right integrity

Signed: Ed Friedler

My personal objectives for the Supervisory Skills Training Program are:

1. find out what this training is all about
2. improve my ability to get things done
3. improve my projects' ability to get things done
4. give TRR an opportunity to get itself together

Signed: _____

Lynn Treiber

① Louise Gerber

② MLW

③ Business Office

Lex Frieden

RECEIVED MAR 2 3 1981

Topic: Cognitive/Communication Styles

Description: This session is designed to assist participants in identifying four cognitive/communication styles. More specifically, consideration will be given to the verbal and non-verbal characteristics and key statements of each style, and the means for differentiating styles.

Rationale: Of primary importance to the functioning of any organization is the ability of staff and management to communicate efficiently and effectively. This skill is founded in the capacity of each individual to practice the communication process accurately and objectively. This course provides a conceptual framework for clarifying communication styles and is structured so that participants can develop capabilities in conversing with individuals who use different styles.

Performance Objectives: Upon completion of the session, participants will be able to:

1) Identify the 4 major cognitive/communication styles.

2) Identify and demonstrate the steps used in changing styles.

Advance organizer for presentation:

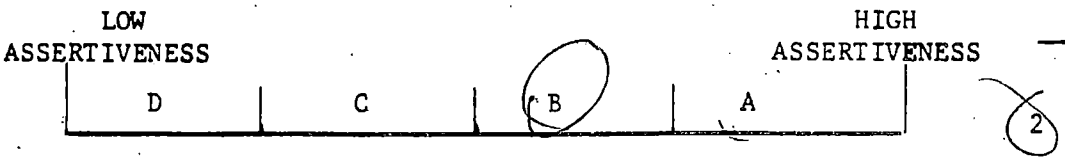
I. Definition of cognitive/communication styles
II. Strengths of each style
III. Verbal & non-verbal characteristics
IV. Typical sentences and phrases
V. Effect of stress and tension
VI. Strategy for changing styles
VII. Use of these skills in the environment

Instructional Methods:

1. Lecture/discussion
2. Small group
3. Role playing

Learning Activities:

1. Complete the Cognitive/Communication Styles Inventory.
2. Write 5 sentences descriptive of one of the styles.
3. Plan a strategy for changing to a different style.
4. Demonstrate the strategy for changing to a different style.
5. Participate in feedback concerning the change strategies demonstrated.
6. Choose 1 of the 3 possible plans for implementing this material and use it before the next session.



LOW ASSERTIVENESS BEHAVIOR:
Easygoing, he/she likes to be unimposing with others. He/she asks questions and listens -- but may not talk unless he/she has a specific reason to do so.

HIGH ASSERTIVENESS BEHAVIOR:
Ambitious, she/he likes to know what is going on and takes action to find out. She/he talks a lot with others -- even when it may not be her/his business to do so.

LOW RESPONSIVENESS

1

LOW RESPONSIVE BEHAVIOR:
Self-sufficient, independent of others, tends to be formal, controlled and cautious with his/her feelings.

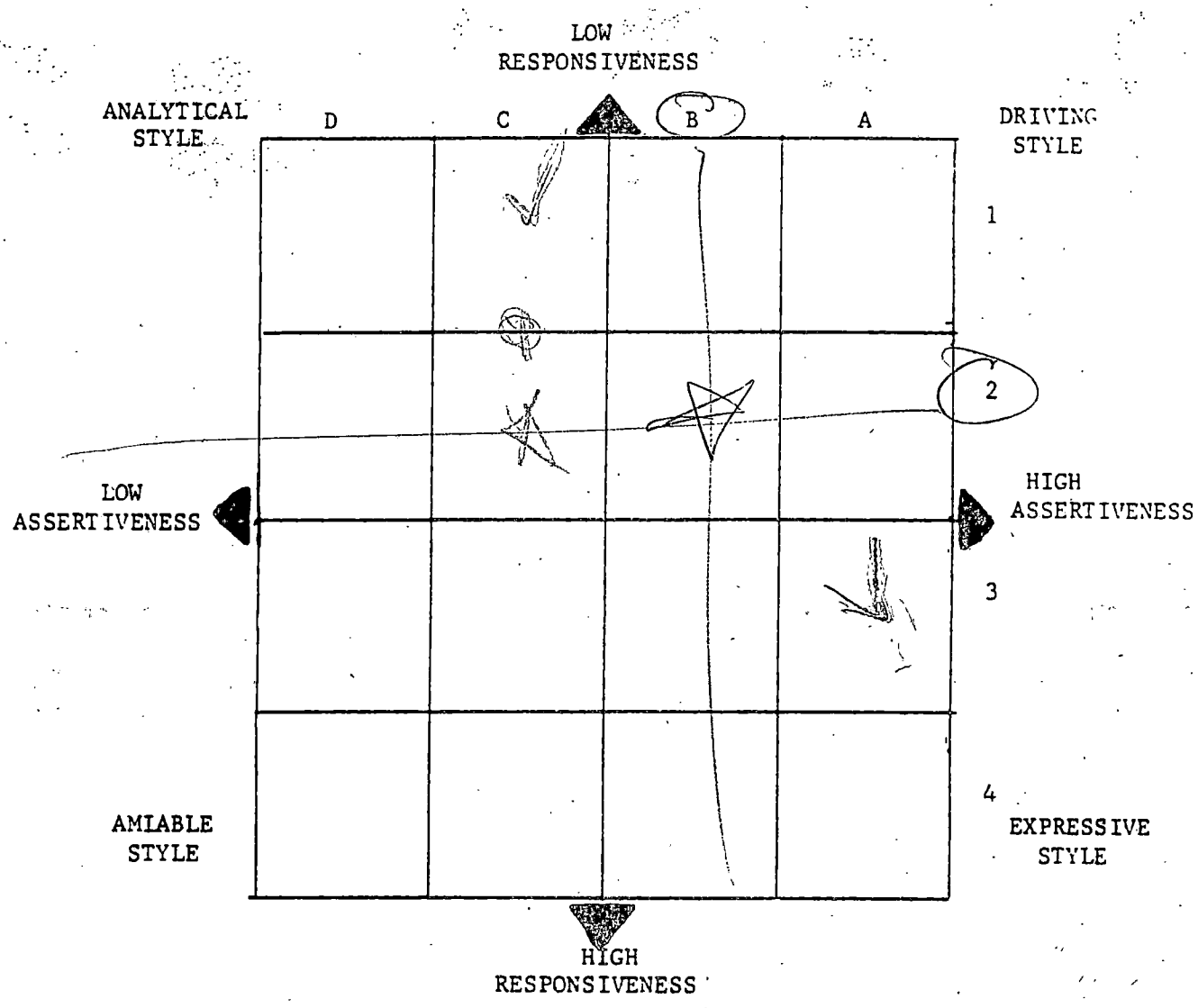
2

HIGH RESPONSIVENESS

3

HIGH RESPONSIVE BEHAVIOR:
Reacts readily to influences, appeals or stimulation, emotional, expresses feelings.

4



VERBAL AND NON-VERBAL CHARACTERISTICS

EXPRESSIVE STYLE	AMIABLE STYLE	DRIVER STYLE	ANALYTICAL STYLE
Great use of hands - expansive out from body.	Gestures generally inward toward body. Open hand gestures.	Will use index fingers to make points.	Gestures tend to be controlled.
Great range of voice inflection. Loudness. Fast paced.	Voice characterized by softness. Slow rate of speed when talking.	Staccato speech pattern. Fast speed and clips sentences.	Monotone - very little variation in pitch. Generally a slow deliberate rate of speed.
Tend to over-talk points.	Tend to listen rather than talk.	Will finish others sentences for them.	Tend to ask detailed questions.
Laugh loudly a great deal.	Smile a great deal.	Tend to be serious.	Tend to frown a great deal.
Walk: movement tends to be fast, sometimes showy.	Walk: slow, easy going walk.	Walk: purposeful and fast paced.	Walk: slow and plodding.
Overly enthusiastic.	Nod a great deal to show feedback.	Lean forward, ready for action.	Do not show enthusiasm.
Will disrupt things when not getting attention.	Tend to be attentive.	Become easily bored.	Preoccupied.
Make descisions often before thinking things through. Take strong stands either for or against.	Will not committ themselves on decisions -- decisions may be tentative. Will go along with the crowd.	Make quick decisions. Pushes others to make decisions.	Ponders -- must consider everything before making a decision. Have great difficulty making decisions.
Uses emotional appeals	Concerned with people's feelings and reactions.	Prides themselves on being objective.	Concerned with facts and figures. Method conscious.
Tolerance for great deal of chaos. Can overcome factors in environment.	Low tolerance for chaos. Seek calm and harmony. Can adapt to environment.	Tolerance for some chaos in environment. Seek to control environment.	Low tolerance for chaos. Seek order in the environment.
Better late than never.	Not aware of timing.	Very conscious of time.	Have difficulty with timing.

KEY STATEMENTS OF EACH STYLE

EXPRESSIVE STYLE	AMIABLE STYLE	DRIVER STYLE	ANALYTICAL STYLE
"If you can't be right be spectacular!"	"Treat others the way you would like to be treated."	"Don't care how you reach the goal -- just do it."	"Let's think it through before we act."
"Baffle them with bull shit!"	"If you don't have something good to say about someone, say nothing."	"Full speed ahead" "Time is money"	"Haste makes waste."

Let's get it together
What are we looking for Jamie?
Make sure that
gets done
Have you finished
that letter yet?

SOCIAL & INTERPERSONAL NEGOTIATION

APPLICATION	DRIVER STYLE "CONTROL SPECIALIST"	EXPRESSIVE STYLE "SOCIAL SPECIALIST"	ANALYTICAL STYLE "TECHNIQUE SPECIALIST"	AMIABLE STYLE "SUPPORTIVE SPECIALIST
In terms of what you need to Give to the other styles:	Give evidence Give ground	Give premiums Give incentives	Give options Give outs He'll always look for the alternatives and exceptions in things	Give assurance Give guarantees
Each of the styles ASKS himself:	WHAT? What is it? What's your idea?	WHO? Who else is involved? Who (what other personality is doing this?	HOW? How does it work? How is it put together? How do I execute that with those people? Instruct me.	WHY? Why should I do that? Why should I initiate this at the risk of losing our relationship?
You need to LET each of the styles:	WIN High aspirations in terms of task. Induces his own TASK TENSION.	GAIN High aspirations in terms of many relationships. Needs personal gain and endorsement.	OFF Let him "off the hook". He needs alternatives to exercise ... especially in interpersonal situations.	RELAX He has enough relationship tension as part of his style. You need not induce more.
Each of the styles will want to be motivated to SAVE:	TIME Time is problems solved. Time is money Structure saves time A bad decision is better than no decision.	EFFORT Because of his sensitivity to the complexity of people, he wants shorter ways, more structured direct systems for saving effort. Will get a TASK done through initiating new relations.	FACE Feels awkward in handling relationships and problems; and, therefore, will go for 10 out of 10 right decisions. No decision or execution is better than a wrong decision	RELATIONSHIP He is relationship oriented. Will get a task completed, but usually as a result of having saved a relationship.
Each of the styles NEEDS TO LEARN TO:	LISTEN (Self-humbling)	CHECK (Self-discipline) Will make generalizations from a sampling of one.	DECIDE (Self-initiating) Will take too many samplings before making a decision or before executing.	REACH (Self-determined)
Each of the styles NEEDS LEADERSHIP THAT:	ALLOWS Needs agreement on objective. He makes structure. GET AGREEMENT on what you want done and leave him alone.	INSPIRES Needs structure. Doesn't need method...he'll create a good method of execution. But he needs personal encouragement, support, and reinforcement that you're consistently excited about the original idea.	SUGGESTS Needs method clarification Alternatives for implementation. The "HOW TO'S" or methods with which he'll execute a plan or project.	DETAILS Needs to have structure & method made him to work within.
Each of the styles MEASURES PROGRESS BY:	RESULTS Did we reach the task objective we agreed upon?	APPLAUSE Did they love me, endorse me?	ACTIVITY 100 facts are better than 75 ... postpone the action/ decision. If it's a ten year project instead of a five year, it must be a better one.	ATTENTION Do they still care? Do they know I'm here?

CHANGE STRATEGY

1. What change would you like to make? What is your reason for making it?

get an assistant for 1 ½ days more time for grant writing

2. What is the communication style of a key person who you will need to obtain either their support or approval? If it is a committee, who has the informal power on the committee? What is that person's style?

analytic - expressive

3. What will be the major motivator of your key person in agreeing to the change?

facts & info - not to politics

4. What do you need to cover in the opening sentence to capture the attention or interest of your key person? WRITE OUT YOUR OPENING SENTENCE.

5. What is the area of insecurity regarding the change for your key person?

6. What questions do you need to be prepared for?

7. What presentation elements will you need to consider:

   a. Setting for the discussion -- office, cafeteria, hallway, neutral areas, etc.

   b. Written vs. verbal -- How much should be written?

   c. Amount of non-verbal communication -- How much non-verbal communication will be needed to show your interest and committment to the change?

A CHART OF THE DIFFERENT MEDIA OF COMMUNICATION

Medium	Type	Strengths	Weakness	Remarks
Grapevine	Oral	Personal. Of, by and for employees.	Often inaccurate. Does not reach everyone.	Thrives when other channels of information are closed.
Telephone	Oral	Convenient. Two-way. Fast.	Not face-to-face. Cannot observe. Non-verbal.	Indispensable.
Meetings	Primarily oral	Face-to-face. Potential morale builder. Faster than talking individually to each employee.	Often one-way. Unless well done, audience may regard as a waste of time.	Basic and universally used. Can go over big or flop.
Suggestion system	Written	Gets ideas and gripes out. Voluntary.	Majority of ideas are rejected. Slow. Used by only a minority of employees.	If other media are lacking, suggestion system can be used by employees to get gripes as well as ideas to management.
Memo	Written	Official. Convenient.	Impersonal. Slow. May be ignored if over used. One-way.	Real, but limited function to perform.
Bulletin board	Written	Official. Convenient.	Impersonal. One-way. Suitable for certain types of communication only.	Of limited use.
Employee booklet	Written	Official. Convenient. Comprehensive. Wide coverage.	Impersonal. One-way. Needs to be revised frequently.	Chief vehicle for telling employees about the firm.
Employee newsletter	Written	Wide coverage. Report current news.	Mostly one-way. Contents often trivial.	Generally not as effective as it could be.

VERBAL COMMUNICATION

COMMUNICATING WITH EMPLOYEES:

Clear, concise and complete information gets results.

Share information at the beginning of the shift, when employees are fresh--before they become involved in other tasks.

Get information to them promptly. Share what is known--even if the final word isn't in yet.

Focus whenever possible on what the topic means personally to the employees or patients.

Present all viewpoints on controversial issues. Generally let employees draw their own conclusions.

Avoid overkill. Interest is kept highby short presentations that hit main points only. Subsequent discussion will bring out the details.

Call in a knowledgable person or high level manager to present materials you're not at ease talking about, or materials that you are unfamiliar with.

COMMUNICATION WITH TOP MANAGEMENT:

The kind of information that should be brought to top management:

1. Good news or bad news that would have a major effect. Examples--Warning about a potentially unsafe process.

2. Decisions whose ultimate solution is in the hands of top management only--decisions where their knowledge, abilities and skills are necessary.

3. Decisions involving top management policy--ideas affecting image of the organization, personal activities of employees that directly affect the organization.

4. Reports of outstanding achievement, record work, departmental success or failure.

5. Information that would reach the top through other sources. For example: poor morale, employee dissension, unethical behavior. Being forewarned helpsmanagement avoid crisis situations.

Types of problems that should not be brought to top management:

1. Problems that can be handled by someone else; internal problems within a division or a department (departmental methods, procedures, discipline).

2. Problems that a subordinate brings as a pretext to see the senior person on another matter or to gossip.

Co-leaders for the Supersivory Skills Training Program

	Mornings	Afternoons
1. Communication	Margaret Watson	Johnnie Mitchell
2. Assertiveness	Margaret Watson	Sue Axel
3. Dynamic Leadership	Margaret Watson	Drucie Bohlen
4. Diagnosing Appropriate leadership & Motivation	Margaret Watson	Mary Sawyers
5. Creative Management of Stress	Ken Nations and Shirley Harmon	
6. Reducing Role Stress & Motivation: Determining Satisfiers	Marcia Sanderson	Margaret Watson
7. Time Management and Delegation	Gayla Alexander	Margaret Watson
8. Motivating, Managing and Developing People	Ken Nations and Shirley Harmon	
9. Evaluating Performance	Susan Verghese	Margaret Watson
10. Disciplining without Punishment	Judy Clay	Margaret Watson
11. Performance Standards	Betsy Littell	Margaret Watson
12. Coping with Difficult People	Ken Nations and Shirley Harmon	

SCHEDULE

Tool	Format	Complete	Report	Audience
Participant Expectations	List	1st Supervisory Skills Session	At Completion of Supervisory Skills	Participants
Inventories	Questionnaire	During Sessions	During Sessions	Participants
Participant Goals	List	During Session	At Completion of Supervisory Skills	Participants
Implementation of Specific Skills	Describe List	Throughout the Year	At Completion of Supervisory Skills	Participants
Perceptions of the Environment	Questionnaire	March 1981 March 1982	March 1981 March 1982	General TIRR & Baylor Staff (Participants & Non-Part.)
Session Effectiveness	Questionnaire	During Sessions	During Sessions	Participants

SUGGESTED READING LIST

DIET AND EXERCISE:

Bailey, Covert. Fit or Fat.
613.71 B154 AH-2, AL, BB. CB, CHUM-4, DH, HB, IB, JFJ, KB-2, KG, LM, MB-2 OF, PP, RB-2, UB, WB, YB

Cooper, Kenneth. Aerobics
QT 255 S5622 AC, AL, CSCT-2, HB, JFJ-3, FB, LM, OF, PL, PP, RB, UB, WB

** Davis, Adelle. Let's Eat Right to Keep Fit
641.1 D261 AL-2, CSCT

Fixx, James. The Complete Runner's Book
796.426 F566 CFAR-3, FL-2, JFJ-2, MB, RB, UB

Man, John. Walk! It Could Change Your Life.
796.51 M266 AC, AH, CFAR-2, FL, JFJ, KB, MB, PP, RB

** Pritikin, N. Pritikin Program for Diet & Exercise
613.2 P961 AH, AL, BB, CSCT-2, DH, FL, IB, JFJ-2, KB, LM, LW, MB, OF, PP, WB

Ullyot, Joan. Women's Running
796.426 U42 AC, BB, CFAR-2, JFJ-2, PP, RB

FINANCIAL PLANNING:

Lowry, Albert. How You Can Become Financially Independent by Investing in Real Estate
332.6324 L921 AC, AH-3, AL-2, CBUS-3, DH, FL, IB, JB, JFJ-5, KB-4, LM, MB-2 OF-2, PL, PP, RB-2, UB, WB-5

Porter, Sylvia. New Money Book for the 80's
332.024 P848 CBUS, DB, JFJ, AH-2, AL-2, CBUS-2, HB, IB, JB, LES, LM, MB-2, PP-2, RB, WB-2, YB

Tobias, Andrew. The Only Investment Guide You'll Ever Need
332.67 T629 AH-5, AL-3, BB, CBUS-2, FL-3, IB-2, JFJ-7, KB-5, LES, LM-3, LW-2, MB-4, OF-3, RB-2, SP, UB, WB-7, YB

Van Caspel, Venita. Money Dynamics: How to Build Financial Independence
332.024 U222 AC, AH, AL-2, BB, CBUS-10, JFJ, KB-2, LM, MB-3, PP-2, RB, UB, WB, YB

MANAGEMENT:

Drucker, Peter. The Effective Executive
658 D794 AL-2, CB, CBUS-5, DB, JFJ-3, KB, MB-2, OF, PP

STRESS & DISEASE:

Ardell, Donald. High Level Wellness.
613 A676 AC, BB, CSCT-2, RB, WB-2

Friedman, Meyer. Type A Behavior and Your Heart.
616.12 F912 AH, AL , BB, CSCT-4, HB, JFJ-2, KB, LM, MB-2, PP, RB, UB, WB

Pelletier, Kenneth. Mind As Healer, Mind As Slayer.
616.08 P388 AC, BB, CSCT-2. KB, MB, PP-2, RB, WB

Selye, Hans. Stress Without Distress.
158.1 S469 CHUM

Simonton, Carl O. Getting Well Again.
616.994 S611 AH, AL-2, BB, CB, CSCT-3, FL-3, HB, IB, JB, JFJ-3, KB-3, LES, LM-2, MB-2, PL, WB-3, YB

** Steiner, Claude. Games Alcoholics Play.
616.861 S822 AH-2, AL-2, BB-2, CB, CSCT-2, DB-2, DH, FL, HB, JB, KG-3, LW MB, OF, PP, RB, UB, WB

Ulene, Art. Feeling Fine.
613 U37 AH, AL, CSCT-2, DB, DH, FL-3, HB, IB, JB, JFJ, KB-2, LES-2, LM, LW, MB. OF, PL-2, PP, RB, SB, YB

CAREER DEVELOPMENT:

** Bolles, Richard. What Color Is Your Parachute?
331.128 B691 AH-2, Al-2, CBUS-10, FL, KB-4, MB-2, PL-2, PP, UB, WB-5, YB

RELAXATION & MEDITATION:

Benson, Herbert. The Mind/Body Effect.
616.019 B474 AC, AH, BB, CSCT, JFJ-2, KB, LW, MB, PP, RB

Benson, Herbert. The Relaxation Response.
616.132 B474 AH, AL-2, BB-2, CB, CSCT-2, DH, FL-2, HB, IB-2, JFJ-4, KB-2, LES, LM-2, MB-2, OF, PP, RB-2, SB-2, UB-2, WB-2, YB-2

Bloomfield, Harold. T.M.: Discovering Inner Enery and Overcoming Stres
291.43 B655 AH, BB, CHUM-10, DB, PL-3, KB-3, LM-2, MB, RB-2, WB

Culligron, Matthew. How to Kill Stress Before It Kills You.
155.24 C967 AL, CHUM-2, JFJ-3, LW, MB

SELF IMPROVEMENT:

Butler, Pam. Self-Assertion for Women.
155.633 B986 CHUM, DB, BB, UB, JFJ-3

Colemen, Emily. Brief Encounters.
158.2 C692 AH, CHUM-2, Db, JFJ-2, OF

Dyer, Wayne. Pulling Your Own Strings.
158.1 D996 AM-5, AL-5, CHUM-10, DB, DH, FL, HB-2, IB, JFJ-5, LES, LM-2. MB-6, OF-3, PP RB-3, UB, WB-7, YB

** Dyer, Wayne. Your Erroneous Zones.
158.1 D996 CH, CHUM, HB

Goldberg, Herb. Hazards of Being Male.
301.411 G618 AC, AH, CSSG-2, HB, JFJ, KB-2, LES, MB, PL P, RB

Goldberg, Herb. The New Male.
301.411 G617 AH, AL, BB, CSSC-3, FW, WB, YB, PB, HB, IB, JFJ, KB, KG, LES, LM, MB, PP.

Luce, Gay. Your Second Life.
155.67 L935 CHUM-2, HB, KB, PP

Pleck, Joseph. Men and Masculinity.
301.411 P724 BB, CSC-2, DB, IB, JB, KB, LES, LW, OF, PP, RB, WB, YB

** Rubin, Theodore. The Angry Book.
151.434 R896 CHUM

** Sheehy, Gail. Passages.
301.434 S541 AH, AL, CSSC-8, FL-3, JFJ-3, PP

Wells, Theodora. Keeping Your Cool Under Fire: Communicating Non-Defendively.
151.1 W456 AL, CHUM-2, KG

MISCELLANEOUS:

** Fromm, E. Man for Himself
171F AL, CB-2, CHUM, DH, FL-2, HB-2, JB, LW, OF, PP, WB

Horney, Karen. Neurosis and Human Growth.
616.8 H HB

** James, Muriel, and Johgeward, Dorothy. Born to Win.
616.891 J28 AH-2, AL-3, BB-3, CSCT-6, DH, FL-3, HB, JFJ-2, KB-5, KG, LW, MB-3, OF-2, PP-4, RB, UB-4, WB-7, YB-3

Lorsch, J. and Morse, J. Organizations and Their Members: A Contingency Approach.
301.1832 L877 CSSC

Satir, Virginia. People Making.
301.427 S253 AL, CSSC-2

Steiner, Claude. Games Alcoholics Play.
616.891 J28 AH-2, AL-3, BB-3, CSCT-6, DH, FL-3, HB, JFJ-2, KB-5, KG, LW, MB-3, OF-2. PP-4. RB, UB-4, WB-7, YB-3

** Freudenberger, Herbert J. Burn Out.
151.1 F889 AH-2, AL, BB, CB, CHUM-4, DH, IB, JFJ, KB @, KG, LM, MB-2, OF, PP, RB-2, UB WB, YB

/mr

List of Libraries in Houston

AC	Acres Homes	448-9841
AH	Hillendahl	467-9090
AL	Looscan	622-6525
BB	Bracewell	941-3130
CB	Carnegie	227-9177
CBIC	Biblio. Centr.	224-5441
CBUS	Business "	224-5441
CCR	Children's Rm.	224-5441
CFAR	Fine Arts	224-5441
CHUM	Humanities Centr.	224-5441
CL	Clayton Geneal.	524-0101
CPRO	Pro. Lib. Centr.	224-5441
CSCT	Sci. Tech. "	224-5441
CSSC	Soc. Sci. "	224-5441
DB	Dixon	633-2147
FL	Bookmobiles	869-5161
FILM	Film Lib. Centr.	224-5441
FW	Fifth Ward	236-0759
HB	Heights	861-4149
IB	Moody	697-2745
JB	Johnson	733-1983
JFJ	Jungman	789-7211
KB	Kendall	497-3590
KG	Kashmere Gardens	674-8461
LES	Smith	741-6220
LM	Melcher	641-5611
LW	Lakewood	633-3725
MB	Meyer	723-1630
MDA	M. D. Anderson	792-7180
OF	Oak Forest	688-2251
PL	Pleasantville	676-0693
PP	Park Place	645-4183
RB	Ring	468-2643
SB	Stanaker	923-8784
DH	Cliff Tuttle	675-4656
VB	Vinson	433-0356
WB	Walter	771-5797
YB	Young	643-8556