LEARNING CIRCLES

Facilitator's Training

Curriculum written by:

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The Butler Institute for Families

University of Denver

Sponsored by:

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A Service of the Children's Bureau

Western Workforce

Colorado • North Dakota • Wyoming

Training Agenda

Day 1

• Introductions & Housekeeping	8:30-8:50
• Review of Western Workforce Project	8:50 - 9:00
• Icebreaker	9:00 -9:25
• Principles & Conditions	9:25-9:35
• Introduction to Learning Circles	9:35-10:45
• Break	10:45-11:00
• Readiness for Change	11:00-12:00
• Lunch	12:00-1:00
• Finding and Using Information	1:00-2:15
• Learning Circles Application	2:15-3:00
• Break	3:00-3:15
• Panel	3:15 – 4:30

Day 2

• Review and Introduction to Day 2	8:30-9:00
• Group Facilitation Skills	9:00-9:45
• Break	9:45-10:00
• Group Dynamics	10:00-10:45
• Learning Circle Model Fidelity and Ongoing Evaluation	10:45-11:05
• Lunch	11:05-12:00
• Learning Circle Practice	12:00-3:00
• Adjourn	3:30

Section 1

Training Competencies & Learning Objectives

Competency 1:

Understand how to improve organizational climate through the implementation of learning circles which lead to a learning organization.

a. Describe how the Western Workforce project goals connect to the learning circles.

b. Define key components of a learning organization.

c. Explain how to conduct learning circles.

d. Explain the process for conducting the initial learning circle meeting.

e. Explain the process for managing ongoing learning circle meetings.

f. Persuade others to adopt a learning circle approach.

g. Connect the agency mission and values to a learning organization philosophy.

h. Identify the process for establishing group norms within the learning circle.

i. Assess personal attitudes and adaptation to change.

<u>Handouts</u>

Handout 1: Training Agenda and Competencies

Handout 2: Western Workforce Teams

Handout 3: Necessary Conditions for a Learning Organization

Handout 4: Learning Circle Approach

Handout 5: Learning Circle Initial Meetings

Handout 6: Change Activity for LC Meetings

Handout 7: Frequently Asked Questions

Handout 8: Dimensions of Group Norms

Handout 9: My Learning Circle Introduction

Handout 10: Readiness for Change Questions

<u>Other Supplies</u>

Chimes (to call time)
Flip Chart Paper and Markers for tables

Clock with Second Hand

LCD Projector with Computer

<u>PowerPoint Slides</u>

Learning Circle Training

Learning Circle Training & Change

Definition of Learning Organization

Research About Organizational Change

Learning Circle Activity

Learning Circles

Review of Western Workforce Project

Western Workforce Teams (Diagram)

Necessary Conditions for a Learning Organization

DFS Mission and Vision Statements

In Learning Circles….

Learning Circle Approach

PARA Approach: PLAN

PARA Approach: ACT

PARA Approach: REFLECT

PARA Approach: ADAPT

Learning Circle Process (Diagram)

Learning Circle Process 2

Learning Circle Process 3

Readiness for Change Questions

A. Introductions & Housekeeping, 8:30 – 8:50

1. Welcome participants.
2. Display the **PowerPoint Slide: Learning Circle Training.**
3. Introduce the training and yourself. Ask participants to briefly introduce themselves.
4. Review the competencies and learning agenda for this two-day training. Refer participants to **Handout 1: Training Competencies and Agenda.** Show the **PowerPoint slide, Training Competencies & Agenda.**
5. Review the agenda for the training. Briefly cover the high points of the training.
6. Explain the context for this training with the following information. Show the **PowerPoint slide, Learning Circle Training & Change.**

> Your agency became involved in the Western Workforce project to take a look at what improvements might be made in the organization that would make this a place where the best and the brightest child welfare staff would want to come, be trained, commit to helping children and families, and develop their careers. They did this by agreeing to comprehensively look at how this agency functions, and then committing to a multi-level intervention to improve or *change for the better* what's not working well at this agency. Improvement in organizations starts by committing to the process of self examination, visioning a different kind of future, and figuring out what needs to change and then seeing it through. Also, very importantly, when an agency is committed to making changes that will energize, professionalize and stimulate the workforce, change will necessarily have to occur at all levels of the agency. There may need to be top level interagency conversations or new agency policies. We also know that change for the workforce, within a child welfare agency, needs to involve the supervisory unit. Supervisors are key to a positive organizational climate. In fact, in times of great organizational stress, an intervention such as the learning circles gives the unit some degree of control over their practice and climate. This sounds like a lot of change but organizations that have been most successful at attracting and keeping the most talented workforces, have done so, by committing organization-wide, at all levels, to meeting the needs of their clients and supporting their staff to do the best work, and empowering staff to engage in problem solving and decision-making. These qualities help contribute to a learning organization.
>
> For example, let's look at how Apple addressed changing technology versus Sony. Apple embraced and led the change in music technology and listening habits by inventing the i-pod while Sony struggled to keep up, trying to retain the "walkman" and similar technology that paled next to the innovativeness of Apple's products. Even today, Sony continues to lose market share while Apple dominates the market with its ever-changing technology. Those

two companies illustrate how important it is to adapt, empower staff, and change to an ever evolving world.

Bottom line; change is hard, but this agency has signed up and made a commitment to improving the agency, that is ***changing to improve the child welfare workforce. Learning circles will provide the opportunity for staff to engage with their teams to solve issues relevant to them and the agency.***

B. Review of Western Workforce Project, 8:50 – 9:00

7.Explain the connection between the Western Workforce Project and the development of a learning culture. Show the **PowerPoint slide, Review of Western Workforce Initiative.** First, give an overall introduction to the project. Explain,

The overall goal of the Western Workforce Project is to *collaboratively develop and test a workforce intervention model for child welfare that responds effectively to diverse local needs.* The entire project is predicated on the belief that by using information such as from the COHA, to address practice and organizational issues, people can resolve those issues to improve team and agency functioning that will ultimately positively affect outcomes to children and families. Change cannot happen without a commitment to welcoming and integrating new information and approaches to age-old issues. When an organization makes this kind of a commitment, they become a Learning Organization.

8.Remind people of the Western Workforce teams. Show the **PowerPoint slide** with the diagram of the teams. Very briefly cover the information below and as each team is discussed, be sure to tie this to the development of a learning culture.

The Start Team

Who: Agency managers, supervisors, caseworkers, key community stakeholders, and family representatives.

About: These team members introduced the project to the agency and laid the groundwork for future implementation. They provided feedback on the development of the Comprehensive Organizational Assessment and then helped to facilitate the actual assessment. Once the assessment results were in, this group helped to interpret findings and identified workforce issues needing targeted improvement. The Start team has concluded its work and has morphed into the Design Team.

Design Team

Who: Child Welfare managers, supervisors, caseworkers, case aides and other support staff; and others as appropriate.

About: Based upon COHA results, this team prioritizes goals related to workforce issues, chooses strategies, implements those strategies, assesses results, and revises plans as appropriate. Membership reflects all agency levels from the agency manager or director to case aides. As appropriate for the agency, these teams may also choose to invite community stakeholders and family representatives. Jointly, this team works together to implement their agency-specific workforce plan. These plans are evolving in nature, using a constant plan, act, reflect, adapt loop (known for this project as the PARA approach). Specific interventions may address a wide variety of issues identified by the COHA, for example recruitment, worker preparation, or retention issues.

The steps of building a learning culture are inherent in this process. Their focus is to take the issues plaguing the agency and develop innovative solutions. Here the seeds of a learning culture blossom through constant cultivation and nurturing.

Learning Circles

Who: Supervisors and their workers together in learning teams.

About: Meetings focus on organizational climate and implementing best practice approaches at the supervisor/worker group level. As appropriate, participants send ideas to other teams to support organizational culture change.

This team is at the heart of the development of the Learning Organization culture. By design, team members work together to improve unit and agency functioning.

Macro Team

Who: State or County agency /Tribal leaders, University partners, community stakeholders and family representatives.

About: Some strategies related to effective workforce practices can really only be addressed at the macro level. Interventions at the macro level focus on common issues across the state or a large county that impact the workforce, for example centralized recruitment efforts or the establishment of better relationships with the court. Strategies emanating from the macro team will address cross-cutting policy and possibly even legislative issues that impact the entire workforce. Participants will meet approximately quarterly during the project's life.

Stipend Committee

Who: Agency representatives, University representatives, and stipend students.

About: This team focuses on recruiting students for BSW/MSW stipends. The committee develops the selection process, procedures and sets criteria for awarding stipends. Selection criteria may include grades, experience, diversity, and population served. Committee members participate in the selection process by screening applications, participating on interview panels, and scoring and choosing award recipients. During the oversight phase, committee members provide ongoing management and decision making. Additionally, they develop a collaborative stipend student internship program, monitor student compliance, provide problem solving and arbitration for students and agencies as well as offer input to the curriculum. This committee meets regularly as necessary and for the duration of the project. By focusing on professional development, the entire organization grows.

Refer to **Handout 2: Western Workforce Teams** and tell them that this handout contains the information we just went over. Next we're going to explore how teams function and the dimensions of a learning organization.

C.Icebreaker, 9:00 – 9:25

9.Review the definition of a learning organization. Show the corresponding **PowerPoint slide**:

Definition of learning Organization

"A learning organization is an organization skilled at creating, acquiring, interpreting, transferring, and retaining knowledge, and at purposefully modifying its behavior to reflect new knowledge and insights" (Garvin, 2000, p. 11).

Research has shown that work environments with the qualities of a learning organization result in these better outcomes (Glisson & Green, 2006; Glisson & James, 2002; Glisson, Dukes, & Green, 2006). But in order for a learning environment to flourish, it's important for everyone in the agency to understand and be open to those qualities that typify the learning culture. It is for this reason that we are having this training today; it is so that everyone has the same foundational information about what a learning organization is and how supervisors and their teams can help to build a learning culture at this agency.

The learning organization provides a hospitable environment for the learning circles and the learning circles help create the learning organization. Without a commitment to change and continuous improvement, the learning circles will not succeed. Engaging in learning circles helps to create a learning organization and a learning organization grows when people work together to improve their agency and their practice. This symbiotic relationship creates and sustains positive change.

10. Explain the connections between unit change, organizational change, improved workforce, and better client outcomes. Display the **PowerPoint slide, Research About Organizational Change.** Explain that the learning circles can start this chain reaction that leads to better client outcomes.

> **Trainer Note:** Prior to the training arrange the room so there are two circles of chairs facing each other.

Tell participants that now we're going to do an icebreaker to get them thinking about how groups interact together.

11. Ask participants to sit in the outer or inner circle, facing each other. Ask them to leave their belongings at the tables as they will be moving around the circle. The people in the inner circle will stay put, only the people seated in the outer circle will be moving. Explain that this will be their first activity, using a "learning circle"—well kind of. Display the **PowerPoint slide, Learning Circle Activity.** Explain:

1. You will be asking them to discuss several experiences with their circle partner. They will have four minutes to discuss this experience, then you will call time and the person in the outer circle moves one chair over clockwise. They will then discuss the next statement with their partner, with each person taking about 2 minutes to share with their partner. The trainer should keep time and announce when their partner should switch and then again, when they should rotate.
2. The statements are:
    - Describe a positive experience you had with a team or a group where you solved a problem and why it was so positive.
    - Describe a negative experience you have had with a group when they just couldn't resolve a situation or solve a problem and why it was negative.
    - Describe an experience that you have had either in this agency or another that reflects the qualities of a learning organization.
    - What do teams need to be effective?

After each statement, the outside group moves so that there will be 4 moves in total. Explain that they won't get a chance to talk with everyone but they may get to know a few people a little better.

12. Process the activity with participants, eliciting common themes. Ask participants questions such as:

- What were some of the commonalities in the positive experiences?
- What were some commonalities in the negative experiences?

- What does this exercise tell you about building a learning organization at your agency?
- What are some of the lessons from this activity?

13. Tell participants that they just experienced a type of learning circle which is where people talk, think and learn together. If you had developed an action plan in this short conversation, you would really be illustrating the point of learning circles, that is to not just talk, but to make meaningful changes because of a thorough discussion. Learning Circles are an important component of the Western Workforce Project and our work together. Let's briefly explore what Learning Circles are and then we will talk more about the Project. Display the **PowerPoint slide, Learning Circles.** Provide the following introduction to this training:

Learning Circles

Learning Circles are groups that engage in a process of learning through discussion leading to problem-solving then applying that learning to making decisions that result in meaningful change. The group learns through exploring issues and questions that are of interest to the group. Typically, the learning circle meets regularly and is facilitated by a group leader, the supervisor. Group members share leadership of learning topics, and hold each other accountable to apply content to practice so that change occurs at the most basic level in the organization. The learning circles recognize the inherent strength of people to assess situations and issues facing them, develop workable strategies, and then implement them. Learning circles empower staff to make decisions on those issues that matter the most to them and that they do have control over in their positions. The overall goal for the Learning Circles is to improve outcomes for families and children by positively affecting the way your agency and your team functions. That means examining and improving how things are done (our system) and what we are doing (our practice). The product or the end result of the learning circle is positive change in serving families. As we explore this more during the training, you will have a better idea of what some of these products or changes might encompass. This could be done on a unit or agency level. Most importantly, the **process is as important as the product.**

14. Orient them to the **Learning Circle Manual** and explain that this manual will be used to help guide the learning circles on an on-going basis as well as be referred to frequently in this training. It contains multiple sections including background information, a step-by-step guide for conducting the learning circles, techniques for facilitation, all forms and worksheets, and resources. Allow participants a few minutes to flip through the book. Explain that as we go through this training, we will flag the corresponding section in this book.

15. Segue to a discussion on the Learning Circle principles.

D. Principles and Conditions, 9:25 – 9:35

16. Review the principles of a learning circle found on page 2-1 of their **Learning Circle Manual.** The principles are:

Learning Circles…

- Create organizational change through solution-focused discussions and subsequent actions at the team level.
- Inspire a learning organization committed to improved practices and functioning.
- Address challenges or practice issues relevant to and actionable by the Learning Circle team.
- Connect practice change to the agency's mission, values, and practice model.
- Employ interventions based upon careful assessment of the current situation.
- Empower team level staff to improve practice for more positive organizational climate.
- Use strengths-focused interventions.
- Embody a culturally-responsive approach.
- Use comprehensive, incremental interventions for long-term sustainability.
- Expect full, open, and unbiased participation that encourages communication by the team.
- Empower team members to engage in collaborative, balanced, and supportive behavior.
- Interact with other agency staff to determine appropriate topics, gather information, and implement interventions.
- Emphasize ongoing evaluation to improve effectiveness and achieve desired outcomes.

Ask participants, what jumps out at you? Conduct a brief discussion about these principles.

17. Review the conditions for a learning organization from the foundational training, Building a Learning Organization. Display the **PowerPoint slide** and refer them to **Handout 3: Necessary Conditions for a Learning Organization:**

1. The recognition and acceptance of differences;
2. The provision of timely, clear feedback;
3. The pursuit of new ways of thinking and untapped sources of information;
4. The acceptance of errors, mistakes, and occasional failures as the price of improvement.

(Garvin, 2000)

Briefly discuss how they can achieve these necessary conditions through the learning circles. Connect these conditions to the opportunities that the learning circles present. For example, inherent in a learning circle meeting is the thorough discussion of issues from multiple angles and this is by definition, the pursuit of new ways of thinking. While in a learning circle, all perspectives and differences of opinion are embraced and inform the assessment of the situation. Through the PARA process, members of the learning circle assess the effectiveness of their action plan, thus looking for feedback. If a plan is not working, then team members adapt that plan or even abandon it for another approach that will achieve their goals.

18. Remind participants of the Department of Family Services' mission and vision statement (ask if anyone knows this statement first). Display the **PowerPoint slide: DFS Mission.**

Our mission
Partnering with our community to protect those in harm's way and help people in need.

Ask participants how the learning circles and the development of a learning culture might facilitate achievement of the mission statement. Elicit the response that the learning circles will develop a more professional workforce and embody the qualities of respect and support. Research has shown that a better workforce results in improved client outcomes.

19. Review the values that guide Denver County Department of Human Services. Display the corresponding **PowerPoint slide.**

Strong Families – Each family in the DDHS system deserves to be treated with dignity and respect.

Safe Children – All children deserve a safe and permanent family.

Strong Resource Families – Resource families will receive the support and training they need to be an effective partner in working with families.

Strong, Effective Workforce – The DDHS staff deserves a workplace where all are treated with respect, value, integrity, and honesty.

Supportive Communities – Strong relationships with community partners strengthen our capacity to keep children and families safe.

These values guide our work with DDHS and with our partners and community stakeholders.

Ask now about how these values connect with Learning Circles and creating a learning organization. Also, connect these values to the Western Workforce Project. Tell participants that by engaging in this project we are more explicitly in alignment with the value related to a strong, effective workforce; but we are also achieving the other values as these efforts will ultimately help to improve casework practice as well as our external relationships with partners.

Trainer Note: This section will need to be adapted for each agency/geographic location.

E. Introduction to Learning Circles, 9:35 – 10:45

20. Emphasize that the process of conducting a learning circle is as important as the product or change that comes out of the process. Display the **PowerPoint slide, In Learning Circles….**. As we cover this material, remember that while it is anticipated that you complete an action plan, it is the process of developing that action plan that is as important as the actual product.

21. Review the learning circle protocol. Refer participants to **Handout 4: Learning Circle Approach** and Section 4 in the manual. Briefly review the approach, displaying the appropriate **PowerPoint slides**.

Learning Circle Membership

Learning Circle members consist of one designated team. Typically, this will be the supervisor and his/her workers and case aides assigned to that team. Learning Circles (LC) are facilitated by the team's supervisor who will be specially trained in the LC approach and facilitation techniques. The supervisor may also assign this function or share it with his or her lead worker. During the initial Learning Circles, the meetings will be co-facilitated with a designated LC coach with responsibility gradually handed over as supervisors (or other designated person) develop their own LC facilitation skills. Agency management will not participate in the unit level LC intervention. Though supervisors should check in with their managers about potential topics and keep them fully appraised about the progress of their learning circles on an on-going basis.

PARA: Plan – Act – Reflect – Adapt

Learning Circles use the PLAN-ACT-REFLECT-ADAPT approach (PARA) that mirrors most strategic planning or even problem-solving processes; that is to plan, implement, re-assess, and then begin the cycle anew. As a structured, formal process, it first appeared in the early twentieth century and then was later adopted by the healthcare and then social service fields. This process, known by many acronyms and names, has been widely used by many fields interested in using a problem-solving approach to organizational issues. The PARA method encourages building a learning culture through a systematic approach to acquiring and building knowledge.

The PARA approach adapted by the Western Workforce Project follows four logical steps: plan, act, reflect, and adapt that are implicit in the problem solving process:

Plan

- Connect with others at the agency for input on topic selection (as appropriate) and subsequent plan implementation.
- Assess the situation (What are agency/community strengths? What policies should be considered? What is the agency/community context?) What is it we need/want to change?
- Use data and other documents to inform the discussion.
- Collect information from other units, agencies, or national centers.
- Determine an approach and strategies.
- Create a plan to address the issue (who, what, where, when, how).

Act

- Implement the plan focusing on both short- and long-term strategies.
- Make the plan happen to bring about the change.
- Analyze information.
- Document problems and unexpected results.
- Acknowledge and celebrate successes.

Reflect

- Gather information from the actions and strategies employed thus far.
- Has the situation changed? Are we seeing the results we want? Are things going better?
- Compare information to the expectations within the plan.
- Summarize what was learned.
- Discuss alternative strategies and approaches, what worked, what did not?

Adapt

- Make adjustments to the plan.
- Implement the process again reflecting the latest realities.
- Communicate the plan's status to other teams and the agency.
- Make recommendations for future intervention points.

This approach is not linear but rather simultaneous or overlapping as one step does not wait for the others to finish. When in the process of **"acting"** the implementers may **"reflect"** and recognize that the **"plan"** is not proceeding as anticipated so **"adaptation"** may be immediately necessary. During all phases, Learning Circle members will be **thinking** about the current topic in order to affect change. Also, interventions focus on topics that address small as well as larger issues. Teams design plans with solutions that address the issues most affecting their own practice to improve team and agency functioning in order to ultimately improve child and family outcomes. Implementation of these plans may not be easy and it is important for the supervisor to know how to address the barriers they may face as they implement a different approach to practice and team/agency functioning.

The PARA process runs through a sequence of Learning Circles for each topic and each meeting may only cover a portion of a phase. In particular, the PLAN phase may require several meetings to thoroughly discuss the chosen topic. It is more important to carefully think through the topic rather than to rush through the PARA phases. The PARA phases simply provides a framework for learning about a topic together and then working to address that topic with your team. The point is for each topic to move through the PARA process to maximize the potential for successful resolution and implementation. Actions in the PARA process become the seeds for the growth of both improved child and family outcomes and a learning culture within the team and ultimately, the agency.

Apply this process to a child welfare example such as the topic of increasing face-to-face visitation. Ask participants to help you walk through the PARA steps, not in an actual learning circle but rather to tell the story about what happened in the learning circle. For example:

Brenda's team decided to work on their face-to-face visitation with families. The mini-CFSR and monthly reports show that they're still not meeting the standard. Recently, Brenda talked with her own supervisor, Barbara about this on-going issue facing their unit and Barbara agreed that this would be an excellent topic for Brenda's team to tackle. Where else could Brenda's team go for information? (Pause and solicit responses). After they determined the topic, between Learning Circle meetings they sought information.

Dylan looked at the ARD reports for different counties and found one county that was doing really well with their visits. He called a person he knew at that county to see what the county did to meet their visitation requirements. Janelle checked in with another unit at their agency which consistely performs well and reaches their goals to find out how they manage to always meet the standard. Lani pulled some information about face-to-face visitation off the Child Welfare Information Gateway. She had also just gone to a training on this topic and so brought in the handouts she received. Meanwhile, Cassandra checked out the website for the National Resource Center for Family-Centered Practice.

During the PLAN learning circle, they responded to the topic exploration questions and developed a plan to increase their face-to-face visitation by using all of the information that they had gathered. Over the course of the next two months, they **act**ed on the plan. At each meeting they checked in about how it was going. Two months later, Brenda pulled the data on their visitation and they more formally **reflect**ed on their plan. They saw a definite improvement over last quarter's results but they still had room for improvement. At this learning circle, they talked about what worked and what did not. They **adapt**ed their plan and put this phase into operation over the next couple of months. Four months later, they looked once again at the data reports and found that they were meeting the standard. Most importantly, caseworkers, provided anecdotes about families experiencing positive visitation and even reunifying as a result of those experiences.

22. Acknowledge that participants may be wondering how they go about conducting a learning circle. Explain that the initial set of meetings will be different than the ongoing meetings as at the beginning, they will need to prepare and orient their team to the learning circles. Refer them to the **Handout 5: Learning Circle Initial Meetings** and review the basics of the initial set of meetings. Cover the information below.

During the initial set of meetings, you will be introducing your team to the learning circles and preparing them for engaging in the on-going learning process. First, you'll need to explain the rationale for conducting learning circles. Later this morning, you'll get the opportunity to practice developing that rationale. Also consider reinforcing the rationale with the Department's mission and vision statements as it's a great reminder of why we are all here.

You'll also want to review the learning circle principles. Provide these as a handout to your team members and review them as a way of setting the expectations for the learning circles and establishing your group norms. If we're doing the learning circles correctly, then all of the principles will be realized.

To further set the context, explore the concept of change with your team members. One way to do this is through the change activity that we'll be doing later this morning.

Refer participants to **Handout 6: Change Activity for LC Meetings** and explain that this handout contains the instructions for a change activity that they can use with their team members in an initial meeting**.** We're referring you to it now since we're talking about the initial meeting, but you are actually going to do it later this morning. LC Facilitators may want to conduct this activity to prepare their team members for the changes likely to occur as a result of the learning circles. Continue with the initial meetings presentation.

> Finally, after you've explained the learning circle concept and set the context through your preliminary activities, it is time to select the topics for the learning circle meetings. You've already talked to your manager about ideas they may have for learning circle topics based upon your unit's performance and you've brought these ideas to the group. Other sources for ideas on learning circle topics are the COHA and other monthly performance data. Be ready with a couple of topics from the COHA (for example, "The COHA has indicated that our communication could be improved" or "The COHA noted that we have an issue with our community providers." Also, be prepared with other data reports, for example, "the monthly reports indicate that we are not meeting the standard for face-to-face visitation". Brainstorm this full list of topics. Be sure to record them on the LC form, "Topic Basket" as this will be a source for deciding on topic areas for future meetings. As the last step, determine the topic for the first "official" learning circle meeting. If possible, solicit volunteers for people to collect information on the topic prior to the first meeting. Recognize that this will just be a preliminary swath through the information-collecting process as the first meeting may generate additional ideas for collecting information.

23. Provide the process for an ongoing learning circle (this meeting typically starts to happen after about 2-3 initial meetings). Display the corresponding **PowerPoint slides** and refer back to the handout. Explain that the diagram provides an overview of the process.

> *Step 1:* Convene the meeting. Check to see if anyone has any "baggage" to check before the meeting commences. This is not an opportunity to vent, but rather just to get something out so the meeting can proceed forward. The point is to acknowledge the immediate context in which the team is working. For example, a foster parent screamed at Lindsey today for not doing enough to help her foster kids. While Shaun was berated by the judge for turning in his court report late. Both Lindsey and Shaun needed to check that baggage at the door.
>
> *Step 2:* Select an LC Recorder for the meeting who will also be responsible for turning in the LC Journal.
>
> *Step 3:* Remind all team members of the LC principles that were established at the initial meetings and the purpose for the meeting--that is to create a learning culture.
>
> *Step 4:* Facilitate dialogue about the designated topic. Remind participants of the topic and the phase of the PARA the LC is addressing. Use questions for the appropriate PARA phase to guide the discussion.

Step5: Discuss what has been learned from the day's Learning Circle and review the plan.

Step 6: Set the next meeting date. Adjourn the meeting.

Step 7: Complete the **LC Meeting Journal** and post on the team/agency network and transmit to WW Project staff.

Success happens when the Learning Circles work as a team to solve problems and initiate change from the unit level. Teams will also have brought in the voices of multiple stakeholders to the Learning Circle dialogue. Fresh ideas and perspectives feed upon each other and the organizational climate becomes charged with the possibility of change. Small, incremental steps over time then validate the possibility that change has become a reality.

Typically the PLAN phase will be the most time-intensive and may span several meetings while other phases might just require a brief check-in. The point of the PARA process is to carefully think through issues to develop a plan, act on that plan, reflect on what happened, and then adapt the plan accordingly. Thus different questions and meeting steps guide the distinct phases of the PARA process and are presented in the next section.

24. Acknowledge to participants that so far we've given them a great deal of information and they likely have many questions at this point. We anticipated many of these questions, so have put together a "frequently-asked questions" handout. Refer participants to **Handout 7: Frequently Asked Questions.** Review this handout with participants now, reading the question and providing the explanation. Respond to questions as appropriate. Once all questions have been discussed, invite additional questions and respond as appropriate. The frequently-asked questions and responses on the handout are:

What's the difference between a Learning Circle and a unit meeting? *A unit meeting deals with the day-to-day business of the unit while a learning circle focuses on one topic and is guided by the PARA (plan, act, reflect, adapt) process.*

Who conducts the learning circle? *The designated LC facilitator, typically the unit supervisor but this person could be a lead worker so long as he/she has been trained at the LC Facilitator training.*

How many learning circles do I have to do? *Learning circles are conducted at least once monthly indefinitely. The Western Workforce Project will be providing support and evaluating the process for one year after you begin. But as a problem-solving tool, you can use them indefinitely.*

Once I've done 5 learning circles, am I finished? *No, see above. The coach will attend up to 5 learning circles, then you'll be facilitating on your own.*

How long do I have to do learning circles? *Please see above. As part of the project, your agency has committed to the Learning Circles for a minimum of 1 year, but we hope you will use this tool indefinitely.*

What's an appropriate topic for learning circles? *Previous topics have included: team cohesion, secondary trauma, scheduling, morale, communication, and documentation.*

Am I required to participate in the Western Workforce Project and Learning Circles? *Your agency has committed to the Western Workforce Project for the five-year funding period. As part of your job expectations, management expects you to participate in the project and conduct learning circles. The learning circle intervention lasts for one year of observation and support from staff at the Butler Institute.*

What's in it for me? *Learning circles will help you to address issues that most impact your team and your agency. Your team will decide together how to tackle these issues with an action plan. The process brings decision-making down to the team level and gives you control over issues relevant to you and your team. By engaging in learning circles, your teams helps to create a more positive organizational culture that reflects the qualities of a learning organization.*

How are these learning circles helpful to me in my job? *You and your team decide what to discuss and work on during learning circles. The solutions you develop in your learning should have a direct effect on how your team and agency functions thus improving practice and job satisfaction.*

Do I always need to fill out the learning circle journal form? *Yes, as part of the evaluation process we need to know whether you're conducting learning circles as intended in the model (this is "fidelity"). Your learning circle journals also help us to understand what you are doing in your learning circle and then provide support to you in this project.*

Do I have to complete the evaluation survey? *In accordance with Institutional Review Board (IRB) guidelines, completion of the surveys is completely voluntary. We are asking that you complete the surveys in order to assess the effectiveness of the Western Workforce Project interventions.*

Who's going to see the survey data? *All survey data are completely confidential. Only Butler Institute research staff have access to the securely-stored data. Your unique identifiers will help us to match surveys over time so we can understand your attitudes and reactions to the learning circles over the project period. Data will only be reported in aggregate and never will* *we report anything that could ever be attributed to any individual. We follow strict research protocols established by our Institutional Review Board to protect your privacy.*

Why do we have to keep on taking all these surveys? *So that we can measure your attitudes about the learning circles over time.*

What does my coach do? *Your coach will help you get your learning circles started by guiding you in both the content and process of learning circles. She'll be able to answer questions, like what is an appropriate learning circle topic and how to deal with your group's dynamics. Also, she'll be administering the LC surveys we are collecting at specific time points to assess the learning circle effectiveness. Either in-person or on the phone, your coach will be there to assist you in the ongoing implementation of the learning circles.*

How do I get started with learning circles? *Excellent question! We will schedule an orientation on learning circles by Butler Institute staff for your team during this training. Next your coach will contact you to set up your first learning circle with her in attendance. Within 30 days, you should hold your first learning circle.*

Hopefully now we have cleared up some information about your role in Learning Circles and you have a better idea of what is expected. As you can probably tell, facilitating a LC requires some knowledge of group work so let's spend some time on this topic.

25. Discuss group norms and why they are important to groups, especially Learning Circles. Ask if they already have norms or rules for their unit meetings and why these are important. Refer participants back to the Learning Circle Manual, page 2-1 and remind them of the Learning Circle principles discussed earlier this morning.

Ask participants,

How do these principles inform the group norms that you will try to establish for the learning circles?

Possible responses include:

- Everyone participates in the discussion.
- No ideas are shot down, every idea has potential.
- We will focus on positives and our strengths, rather than our deficits.

Tell participants that as part of the Learning Circle process, they will need to develop their own group norms around the learning circles. They can use one of the preliminary meetings to start establishing what those norms will be with their group.

26. Refer participants to **Handout 8: Dimensions of Group Norms** and review this handout briefly with participants. Tell them that these are all dimensions they should consider setting norms around in their initial learning circle meetings. The dimensions on the handout are:

- Attendance
- Promptness
- Participation
- Interruptions (e.g., phone calls)
- Basic Conversational courtesies (e.g., listen respectfully, one conversation at a time, etc.)
- Confidentiality
- Assignments
- Meeting time and place

27. Allow participants a few minutes to review the Approach section of the manual. Ask participants if they have any questions at this point (more are sure to follow).

28. Conduct an activity to start thinking about how they will present the learning circles to their staff (note, this was mentioned during the initial meetings introduction section discussed earlier). Display the **PowerPoint slide: Activity: My LC Introduction.** Explain that one of the critical things that supervisors will need to do is explain Learning Circles and their purpose to their staff. How this is presented will impact how staff accept or embrace the idea. Ask participants to work in their table groups, but to spend the first part of the activity working independently. Explain that their assignment is to develop a brief introduction on learning circles for their units. They should consider how they would explain the concept and more importantly, garner commitment for the learning circles. The statements should reflect their own personality. Spend about 5 minutes preparing an introductory statement then present that statement to their table group and solicit feedback from their group. The group should provide feedback on the statement. Each group should select one statement, or combine statements to present to the larger group. To reiterate the steps in the exercise are:

1. Reference **Handout 9: My Learning Circle Introduction.**
2. Take about 5 minutes and work independently to craft your introduction to the learning circles.
3. Present your introduction to your group.

4. Provide feedback as a group to each person (focus on strengths and areas for improvement).

5. Select one introduction or combine several introductions to present to the entire group.

Allow about 30 minutes for the activity.

Reconvene the group and ask each group to report out their introductions. Note the strengths of each introduction and applaud their efforts.

Summarize the activity as a large group. Note the similarities in the introductory statements as well as any outstanding differences.

Break: 10:45 – 11:00

F. Readiness for Change, 11:00 - – 12:00

Trainer Note: This same activity can be conducted with their teams during the initial learning circle meetings to introduce them to the concept of change. Curriculum with directions are provided in their handouts. This activity can also be found in the LC Manual.

29. Introduce the next topic, readiness for change. Explain:

> Developing a learning organization is predicated on the belief that positive change is a necessary condition for learning organizations to flourish. But change is hard! Especially, since this is a bureaucracy and is *supposed* to be stable. Therein lies the main issue, this is a public agency and this agency or individuals within the agency may not be good at change or at the very least, entirely comfortable with the notion of change. But, change has become central to the agency's practice, despite the resistance to it. Think about all of the practice changes in the last few years. Think about the CFSR results and the PIP plan and how they've driven practice. If there's one thing that can be counted on, it is change. An organization committed to the development of a learning culture more successfully navigates change.
>
> Supervisors are a key factor in whether or not change actually occurs. The way that supervisors present a change makes all the difference in whether or not their teams eventually embrace the change. It is for this reason that we will be talking about change, both from a personal perspective, and how to communicate it to your teams. We want you to think about how, you personally feel about change and to honestly assess it. This will more readily help your team members also deal with change.

Refer participants to **Handout 10: Readiness for Change Questions.** Display the corresponding **PowerPoint slide**. Ask them to spend a couple of minutes reviewing these statements and jot down how they would respond to them now on a scale of 1 -5 with 5 being strongly agree and 1 being strongly disagree.

The COHA assessed this agency's readiness for change by asking the following statements:

1. Staff understand that specific changes may improve outcomes for the children and families.
2. Some staff members resist any type of change.
3. Most staff are willing to try new ideas.
4. It is easy to change procedures to meet new conditions.
5. Some staff are too cautious or slow to make changes.
6. Staff members ask questions and express concerns about changes.
7. Staff members are encouraged to discuss and explore evidence-based practice techniques.
8. Staff adapt quickly when they have to shift focus to accommodate program changes.

Ask them to notice their ratings pattern and hold these ratings in mind for the next activity.

Trainer Note: Be prepared with the results from the readiness for change scales from this agency's COHA.

30. Conduct a silent walk-around activity about change. Distribute one piece of flip chart paper and markers to all participants. Ask participants to think about their attitudes towards change and write a statement or draw a picture about this attitude on their flip chart paper using the markers provided. Next, ask participants to walk around and read these statements and comment on their flip chart paper using the markers. Ask them to do this silently and comment on all flip chart papers if possible. Allow about 10 minutes for the walk around activity. Note, the activity and debriefing takes about 45 minutes.

31. Briefly ask people to explain their pictures.

32. Bring the group back together and ask questions to process the activity:

- What were some of the similarities in the pictures?
- What were some of the differences?

- To what extent do you think your staff will have similar attitudes about change? Or different?

- How can they use this awareness of attitudes towards change for conducting the learning circles?

This activity illuminates the challenge of change.

33. Summarize the comments about change. Ask people about themes and elicit statements such as:

- People have different perceptions about change.
- It's not always easy to move through change.
- Change can be liberating.
- Change can be really hard and people react differently.
- We need to learn to adapt to changes.
- Our own self-awareness about change can make it easier for our staff to move through change.
- Some staff may dig in their heels about change and it's the supervisor's role to help them move through change.

Trainer Note:

The following material on change management is from, *A Trainer's Guide to Using Information Management to Support the Goals of Safety, Permanency and Well Being*, September 27, 2000, www.muskie.usm.maine.edu/sacwis

and

Gibelman, M. (2003). *Navigating human service organizations.* Chicago, ILL: Lyceum Books.

34. Tell participants:

Change is inherent in child welfare practice. Organizational development experts maintain that the pace of change is so pervasive that the ability to manage change is one of, if not THE, most important skills an employee can bring to the current work environment. For a supervisor, the ability to lead and model commitment to change is an invaluable competency, whether the change is small or large. In fact, managing change may be one of the supervisor's most important roles.

As we are well aware, changes in the workplace occur regularly and will continue to occur in the future. This project is all about change. Agency goals change, people change, procedures change, and the tools needed to do our work change. Some might say that the only constant is change. Developing the skills needed to overcome the fear and loss of control that some folks associate with change, and respond positively to change, have become some of an employee's most essential tools. As a supervisor, you need to understand the dynamics of change, be skilled at building commitment to change, and have the tools you need to lead your staff through the change process by helping them develop positive, focused, and flexible attitudes toward change.

Supervisors can help guide their employees through the change process and influence their attitudes. If the supervisors and his/her workers view the organizational environment as completely toxic, or even terminal—they will ensure that this is indeed the case. The supervisor has a great deal of power to influence the attitudes of a worker. If, on the other hand, they take the same tactic that we encourage workers to take with clients, that is to be strengths-based and focus on empowerment, then the climate changes from an attitude of "can't do" to an attitude of "how can we do." No matter how negative the environment, strengths can always be found and these can be marshaled to make changes in the environment.

Display the **PowerPoint slide, Keys to Successful Change** and briefly summarize these key points just presented. Present the material below.

Use a **Strengths-based Perspective** – Draw upon the resources and capacities of the organization and the people within it to address challenges.

Ask, what are ways they can do this with their team? Or, what are ways you have done this in the past?

Empower Team Members – Transfer power so that your team members can utilize their knowledge and skills to achieve goals.

Ask, what are ways they can do this with their team? Or, what are ways you have done this in the past? **Create momentum through Small Changes–** Take an incremental approach and make small changes that can be successful to support the change process which then leads to bigger changes.

Ask, what are ways they can do this with their team? Or, what are ways you have done this in the past? 35. Summarize the discussion:

Learning circles will inspire change at the unit level and knowing how to manage this change will help ensure that it "sticks" for the long-term. We know that these small, incremental changes can lead to a more positive organizational climate, which in turn lead to happier employees, and ultimately improved outcomes for our clients. Next we're going to talk about how to find and use information to assist you with the learning circles.

Lunch 12:00 – 1:00

Section 2

Training Competencies & Learning Objectives
Competency 2:

Understand how to find and use information for interventions designed by the learning circle teams.

a. Analyze the Comprehensive Organizational Health Assessment for issues relevant to the team.
b. Integrate agency data and other information to assess issues impacting the team and practice.
c. Search for information from multiple sources to inform learning circle topics.

Handouts

Handout 11: Learning Circle Topics and Information Sources

Other Materials

COHA Brief

PowerPoint Slides

Using Information

Using Information 2

G. 1:00 – 2:15, Finding and Using Information

36. Provide some basic content on how to use information to guide learning circles. Cover the material below (from the Learning Circle Manual). Explain that information and data are important components of change. Before jumping in and changing something that feels like it needs to be changed, it is important to look at what information supports implementation of change. Display the corresponding **PowerPoint slides**.

Information from Agency Reports

One of the skills that supervisors will develop in the Learning Circles is the effective and efficient use of information in planning and developing LC interventions. In most child welfare organizations, data and other types of reports are readily available to supervisors. The challenge is having the time to interpret the results of these reports and then to find ways to use those reports to initiate improvements at the practice level. In attempting to interpret agency reports some fundamental questions to ask are:

- What does this information tell us about our practice?
- What does this information tell us about child and family outcomes?
- How are data about practice and outcomes connected?
- What other contextual factors may be related to the results (external or internal)?

Current data and evaluation reports that have been generated for other uses may inform the LC process. These reports may contain valuable information about the organization, the staff, their practice, and child and family outcomes that could provide fundamental contextual information for the LC members when planning and developing actions plans. Supervisors, as facilitators of the LC's, must remember that there are many layers of information that may be relevant to their LC work.

Using Results from the COHA

The COHA provides information about agency factors at multiple levels: the individual, unit, and organizational levels. Determining what information from the COHA to select will depend on what data resonates with the LC members regarding the practice or outcome area they have chosen to address in their targeted intervention. COHA information can support a hunch or intuition, or provide concrete evidence verifying a unit or outcome issue that needs to be targeted.

37. Refer participants back to their agency's Comprehensive Organizational Health Assessment (COHA). Ask them to review the document and select an area that could be addressed at the team level in regards to improving practice or unit functioning and could be a topic for a learning circle. Allow about 5 minutes to look through the document and ask them to write down their chosen topics on a separate piece of paper.

Trainer Note: This is typically a very rich discussion but keep it moving along.

38. Bring the group back together and ask participants why they selected their topics. Ask them to explain what the information from the COHA said about that topic. Make sure they focus on topics relevant for intervention at the team level.

39. Briefly discuss using other sources of information. Present the information below (from the Learning Circle manual).

Using Results from the CFSR or PIP

The CFSR and PIP reports target specific child and family outcomes that are likely to overlap with many topics that LC members may identify for intervention. This is the case because CFSR outcome domains were developed as data indicators of each state's ability to provide the fundamentals in ensuring children's welfare: safety, permanency and well-being. Program improvement plans target specific areas where state's need to improve, and therefore provide excellent data on where there may be organizational supports in place to align with any LC intervention efforts.

Like the COHA, CFSR and PIP reports will provide data at multiple levels of an organization: child and family outcome factors, as well as systemic factors. Using that information to a LC's best advantage will entail careful integration and interpretation of the relevant results in combination with best- and informed practice research.

Other Agencies or Units

Another rich source of information would be to find out how other agencies or units address a specific issue, for example on-call scheduling. It unlikely that how another agency handles on-call scheduling will be written up anywhere, much less published, so the best way to obtain this information is through verbal communication. Find out how agencies or units are addressing a particular topic especially well, and ask them specifically how they do it. People are always willing to share their success stories, they just need to be asked.

Acknowledge that there may not be a data source for everything you choose to address in the learning circle. For example, perhaps the unit has decided to work on communication between team members and other units. There may not be specific data on this topic, but it is nonetheless important for the unit.

40. Discuss the two-way interaction of gathering information if this has not already been brought up in the previous discussion. Suggest that they talk with their managers and administration about areas needing improvement at their agency and/or unit. In turn, they will also be providing information to the managers/administration about their Learning Circle discussions and plans. Emphasize that Learning Circles do not occur in isolation, rather they are opportunities for focused discussion at the team level, but that information and plans for improvement then get shared with relevant people at the agency.

Trainer Note: This activity requires an internet connection. If it's not possible to obtain internet connectivity, prepare screen shots in advance. Type in the website addresses into the search engine.

41. Show how to access information on the web as outside information may help to address some of their thornier issues.

Go to the Child Welfare Information Gateway at the address below.

http://www.childwelfare.gov/

Scroll down the left side and go to "Library Search". Explain that you want to use this search function to look for documents rather than using the search box in the top left hand corner as that only searches the website. Type in "family engagement" and note the number of documents generated by the search engine (over 250). Scroll through a few of the documents. Ask for another topic that they might like more information on at their agency.

Show where to find the links to other websites including the Children's Bureau and the National Resource Centers. Go back to the home page, scroll down the left hand side and click on "Related Organizations" and scroll through the rather lengthy list. Click on the Children's Bureau Training and Technical Assistance Network and scroll through this page. Click on a couple of the NRC website addresses.

Go to another website, the National Resource Center for Permanency and Family Connections at the address below.

http://www.hunter.cuny.edu/socwork/nrcfcpp/

Click on "Information Services", then scroll down the page, noting the variety of resources, and click on "Caseworker/Child and Caseworker/Family Visits."

Summarize the point of this activity; that is to start to expose participants to the wealth of information available on the web. Section 6 of the Learning Circles Manual contains many potential resources.

42. Conduct an activity to get them thinking about where they could go to find information about various topics that have been previously discussed in learning circles. Ask them to work in groups of 3 -4 people. Break them into groups in whatever way makes sense. Refer them to Handout 11: Learning Circle Topics and Information Sources**.** Remind them of all that we've discussed so far about where to find information. Explain that the handout contains a table with real learning circle topics that other learning circles have previously tackled on the left, and a blank column on the right for them to generate ideas about where they could go to find information about those topics both

within and outside the agency. Encourage to think big and outside the box. Allow about 10 – 15 minutes for this discussion.

Reconvene the group and go through each learning circle topic asking groups to report out on potential sources of information. Do this in a round robin format, asking groups to only add new ideas for each topic. Encourage participants to take notes on their handouts for sources of information. Allow about 20 minutes for this large group discussion.

Conclude this discussion by telling participants that they can then use this information to help guide their own learning circles.

43. Summarize the point of this section; that is to make decisions based upon information, not on how something *feels.*

Transition to the next section and explain that now they're going to see how it all fits together by participating in a learning circle demonstration.

H. Learning Circles Application, 2:15 – 3:00

44. Refer participants back to the Learning Circle protocol found in section 4. Explain that now we'll demonstrate a learning circle using a topic from one of the articles just reviewed. Refer them to the laminated topic question card and explain that we are now in the "PLAN" phase of the PARA cycle and that this article presumes that the topic was carefully selected after reviewing the COHA and other agency data. We've done our homework and are ready to really dig into this topic through a learning circle.

Remember, during the plan phase, the following areas are covered:

a) Topic exploration (current situation, challenges, strengths, information from other sources)
b) Plan development (strategies, resources, barriers)

Illustrate the learning circle with your co-trainer and the trainees as participants. This will require extensive ad libbing. Make everyone part of the learning circle. One trainer should facilitate while the other should role play that of a participant in a vocal and knowing way (in other words, be the know-it-all in the group!).

Specifically, the Learning Circle covers the following steps:

Step 1: Convene the meeting. Check to see if anyone has any "baggage" to check before the meeting commences. This is not an opportunity to vent, but rather just to get something out so the meeting can proceed forward. The point is to acknowledge the immediate context in which the team is working.

Step 2: Designate the LC Recorder for the meeting to take notes on the LC Journal and then be responsible for distributing them.

Step 3: Remind all team members of the LC principles that were established at the initial meetings and the purpose for the meeting--that is to create a learning culture.

Step 4: Facilitate a dialogue about the designated topic. Remind participants of the topic and the phase of the PARA the LC is addressing. Use questions for the appropriate PARA phase to guide the discussion.

Topic Exploration Questions

1. What are this team (agency's) strengths regarding this topic?
2. What do we hope will happen by addressing this issue?
3. What is the agency policy around this issue?
4. How does this issue affect our clients?
5. What are the challenges that we all face around this issue?
6. Where can we go to find information about this topic?
7. According to external information, what are the best ways to deal with this issue?
8. According to external information, what should we be considering?
9. What are the pros/cons to this (these) approach(es) suggested by external information?

Plan Development Questions

10. What strategies can help to address this issue?
11. What supports might help with this issue?
12. What resources can we draw upon to assist with this issue?
13. What barriers might be anticipated? How can they be addressed in advance?
14. How will we know we're successful in addressing this issue?

Step 5: Discuss what has been learned from the day's Learning Circle and review the plan.

Step 6: Set the next meeting date. Adjourn the meeting.

Step 7: Complete the **LC Meeting Journal** and post on the team/agency network and transmit to WW Project staff.

45. Conclude the Learning Circle. Ask participants about what they thought of the activity of conducting a simulated learning circle. Recognize that this has been artificial, but nonetheless, it's a good way to start practicing. Their facilitation skills will *not* be put on display as they were here. Tell participants that tomorrow, they will be conducting a learning circle on their own. Ask them to review the Learning Circle manual and select a topic they would like to discuss during the simulated learning circle.

46. Take a break to set up the panel. Seat the panel at the front of the room.

Break, 3:00 – 3:15

I. Panel, 3:15 – 4:30

47. Facilitate the panel discussion with current Learning Circle facilitators. Introduce each panel member. Start the panel off by asking each panel member to briefly discuss their experiences with learning circles thus far. When each person has spoken, ask the panel a few questions to generate discussion (provide panel members with these questions in advance):

1. What topics did your learning circle choose?
2. What was the best part about the learning circles?
3. What challenges have you faced in implementing learning circles? How did you overcome them?
4. How did you interact with your Admin about your learning circles?
5. How did you schedule the learning circles with your units?
6. What are your hopes about the learning circles in the future?

Invite the audience to ask other questions as well.

By 4:25, conclude the panel presentation. Thank the panel members for their participation.

48. Tell participants that Butler Institute staff would like to come to each of their units and make a brief presentation about learning circles and the Western Workforce project to help ease the transition into holding learning circles and make sure that everyone receives the same information about this process. Explain that we'd like to set a date for this introductory meeting sometime in the next 2 -4 weeks. Tonight please determine a couple of dates that might work for your units and we'll schedule this meeting at tomorrow's training. So please bring your calendars!

49. Remind participants of their homework for the evening, to select a topic and prepare for the practice learning circles. Note that in the future, they will select a topic with their unit/team but for the purpose of this activity, they get to select the topic. Ask participants to be on time, 8:30 am

sharp and remind them that the training will conclude by 3:30 pm. Adjourn the training for the day.

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Day 2

Training Competencies & Learning Objectives

Competency 2:

Exhibit group facilitation skills to conduct a learning circle meeting.

a. Describe the appropriate use of facilitation skills that will encourage dialogue among team members.

b. Explain group dynamics that may influence the learning circle approach.

c. Delineate methods for managing the group process.

d. Model group facilitation skills relevant to the learning circle approach.

Competency 3:

Understand how to guide ongoing implementation of learning circle interventions.

a. Explain the process for assuring fidelity to the learning circle approach.

b. Identify ongoing evaluation processes and own responsibilities regarding evaluation.

Competency 4:

Demonstrate how to conduct a learning circle meeting to maintain fidelity to the LC model and achieve desired outcomes.

a. Know ways of engaging all team members in the learning circle meeting to create a collaborative, balanced, and supportive environment.

b. Reflect a culturally-responsive approach when conducting learning circle meetings.

c. Know strategies for overcoming barriers that may interfere with effective team functioning.

<u>Handouts</u>

Handout 12: TEAM: The Four Areas of Group Facilitation

Handout 13: TEAM Behaviors

Handout 14: Learning Circle Questions

Handout 15: My Team's Group Dynamics

Handout 16: The Learning Circle Journal

Handout 17: Learning Circle Evaluation

Handout 18: Learning Circle Practice and Feedback Forms

<u>Other Supplies</u>

Training Evaluations

Red/Green Cards

Index Cards

Hawaiian leis

<u>PowerPoint Slides</u>

Day 2 Agenda

Group Facilitation Skills

Model Fidelity

Important Next Steps

J. Review and Introduction to Day 2, 8:30 – 9:00

50. Welcome participants back to Day 2 of the Learning Circle training.

51. Conduct an activity to review the key points from yesterday's training. Distribute the agree/disagree cards (green/red heavy cardboard). Tell participants that you're going to provide a statement and they need to select a card to indicate whether they agree or disagree with that statement. Use this activity as an opportunity to reinforce key points about the learning circles. The statements and correct responses are below:

1. A learning organization facilitates thinking, learning, and acting together. *Agree*
2. Learning Circle topics are chosen by the Design Team and guided by the COHA. *Disagree, Learning Circle topics are chosen by the individual unit and may be ones identified in the COHA or other issues impacting the unit.*

3. Learning Circle principles include connecting practice to the agency mission and creating organizational change through a focus on improved practice and functioning. *Agree*

4. It's important to 'check baggage' before commencing the learning circle. *Agree*

5. The PARA approach stands for PLAN, ADAPT, REPLICATE, ACT. *Disagree, PLAN, ACT, REFLECT, ADAPT.*

6. The overall goal of the Western Workforce Project is to collaboratively develop and test a workforce intervention model for child welfare that responds effectively to diverse local needs. *Agree.*

7. The first step in the Western Workforce Project is to conduct learning circles to impact change at the unit level. *Disagree, the first step is to conduct a Comprehensive Organizational Health Assessment.*

8. During the Plan phase, the areas discussed are: Topic exploration (current situation, challenges, strength, sources of information and Plan development (strategies, resources, barriers). *Agree*

9. Data from multiple sources including the CFSR, the PIP, and monthly reports can inform topic selection. *Agree.*

10. In a learning circle, it's more important to focus on the process than the content. *Disagree, the process is as important as the content.*

52. Review the day's agenda. Show the **PowerPoint slide, Day 2 Agenda** and review the highlights of the day's activities.

53. Distribute index cards to participants and ask them to write down 1 question, concern, or statement they have about conducting a learning circles. The intent of using the index cards is to give them some anonymity to write about whatever is on their mind. For example, they might write a question, "how do I…" or express a concern, "my group will never make the time for this." Allow a few minutes for silent reflection. Collect the index cards.

54. Read aloud each question, statement, etc. on the index cards and respond appropriately to the question. Solicit ideas from the group as well.

K. Group Facilitation Skills, 9:00 – 9:45

55. Introduce the importance of group facilitation skills for successful learning circles. In a humorous fashion, provide the top 10 reasons for needing to acquire better group facilitation skills. Display the corresponding **PowerPoint slide**, bringing up each reason, starting with #10.

1. Kites have more control on a March day in Wyoming than you do over your meetings.
2. More than once, you're inclined to say, "Would you like some cheese with that whine".
3. You have a rule about bringing sharp instruments or even sharpened pencils to the meeting.
4. Team members surreptitiously text the entire meeting, and worse to each other.
5. Your seasoned staff person dominates the meeting with a description of her ordeal with the plumber and yuk, the mess in her house and it's actually more interesting than a regular staff meeting.
6. Team members appear to be completely zoned out and you seem to have the same effect on them as Charlie Brown's teacher (waa, waa, waaa, waaa).
7. A trip to the dentist to get a root canal sounds more appealing than attending yet another staff meeting.
8. Meeting avoidance has become a gambling opportunity (that is betting on who won't be there this time).
9. The only way to get them there is through bribery of expensive dark chocolate treats that are really starting to put a dent in your wallet not to mention expanding your own waistline.
10. They'd rather be doing paperwork than at your meeting.

If any of these reasons are true for your group meetings and facilitation skills, then you're in the right place to learn how to be a better facilitator.

56. Provide the following introduction. Emphasize the following:

> Learning circles have a different purpose than unit or team meetings; that is not to take care of business, but rather to think, learn, and act together to create change. There's a loose structure to the meetings that should be followed to ensure that the learning circles do not slide into a regular unit meeting, or worse a gripe session. Your job as the learning circle facilitator is to keep the group on track and conduct a learning circle as intended by the project. In order to test the effectiveness of this model, we need to make sure that everyone is approaching the learning circles in a similar manner; that is having **fidelity to the model**. Without fidelity, we won't know if the learning circles are effective. Your group

facilitation skills are essential to conducting effective learning circles. In this next section, we'll discuss key elements of group facilitation.

57. Present the following information on group facilitation skills (from the Learning Circle Manual). Present the corresponding **PowerPoint slides** and ask questions of participants to engage in this material (in other words, display your group facilitation skills!).

> Effective learning circles require attention to managing a group process that engages team members so that the learning, the main purpose of the learning circle, takes place. Good facilitators also need to understand the difference between the **process** and the **content**. **Content** is the subject of the meeting while **process** is the interactions within the meeting. Effective process happens when LC facilitators skillfully manage the group. For the learning circles, the process is just as important as the actual content, as it is through the process that a learning culture is built. During the Learning Circle, team members are thinking and learning together, in order to act and change something in their units or agency.—that is the essence of a learning culture.

58. Discuss the four main areas of group facilitation skills. Display the corresponding **PowerPoint slide, Four Areas of Group Facilitation** and refer participants to **Handout 12: TEAM: The Four Areas of Group Facilitation.** Briefly review the four areas:

> **Transforms the Environment -** sets the context and fosters an environment conducive to interaction.
>
> **Engages Team Members** – encourages participation by all team members.
>
> **Acts as a Leader** – models desired behavior and inspires the group.
>
> **Manages Behaviors** – skillfully manages troublesome behaviors to keep the group focused.

Tell participants,

> Note, that these four areas spell the acronym, TEAM, also the ultimate goal for your group facilitation skill—to build your TEAM. Many techniques and skills are used to facilitate these four areas of group facilitation and as a group member in many different types of groups, you have seen these techniques used before. Next, we're going to discuss the techniques, you the group facilitator can use to more effectively facilitate your group.

59. Conduct a small group walk-around activity to engage participants about how these areas translate into behaviors for the group facilitator. Post flip chart sheets for each area around the room, "one labeled "Transform the Environment", another "Engage Team Members" and so on. Tell participants that they will have 4 minutes at each station to think of all the behaviors that they can for that area and write them on the chart paper. Divide participants into groups of 2-4 people

depending upon your group size. If you have don't have enough people for four groups, that's ok as some stations may just remain empty for a turn. Ask participants to brainstorm as many behaviors as possible during the four minutes until they hear the chimes which signals rotation to the next station. At the next station, they should build upon the work of the previous team.

The list below contains examples of these behaviors. Provide a few examples when providing instructions for this activity.

Commence the activity, keeping time to allow four minutes at each station. Ring the chimes to signal rotation to the next station. The activity should take about 16 minutes total.

Trainer Note: Alternatively, if participants seem to be running out of ideas when they get to the last station, ask them to practice these behaviors in their small group. For example, to Engage Team Members, they might state, "Linda, what do you think of that statement" or "Josh, we haven't heard from you yet today."

Process the activity. Ask one person from each group to present all of the behaviors listed for their area to the large group. At the conclusion of their presentation, flesh out the list from the behaviors listed below that were not covered. If they "practiced" during the final station, ask them to present one behavior they practiced in their small group.

Behaviors associated with each TEAM area include:

Transform the Environment

- Maintains a climate conducive to participating, listening, understanding, learning, and creating.
- Listens actively.
- Creates a safe environment for thinking and learning together.
- Knows how to help people focus.
- Asks questions and listens to the entire response.
- Reserves judgment and keeps an open mind.
- Provides structure and guidance to increase the likelihood that objectives will be accomplished.
- Suggests and direct processes that empower and mobilize the group to do its work.
- Encourages the group to evaluate its own progress or development.

- Helps people arrive at consensus.

Engages Team Members

- Encourages dialogue and interaction among participants.
- Capitalizes on differences among group members for the common good of the group.
- Affirms responses (yes, exactly, say more, good example).
- Respects all participants and their opinions (unless it is detrimental to the group).
- Calls on specific people, (Jacob, what are your thoughts on this?) as well as a variety of people (avoid calling on the same people).
- Engages the group through questions.
- Waits for silence (after asking a question) (I'm patient; you're a thoughtful group today).
- Pays attention and responds to the group.
- Uses humor.
- Connects participants' personal experience (work, life, etc) to the subject.
- Genuinely values the knowledge, information, and expertise of every team member and knows how to draw out that knowledge.
- Invites diverse viewpoints.

Acts as a Leader

- Helps the group establish and accomplish its own objectives.
- Keeps the group focused on its objectives.
- Validates and engage the expertise in the room (Kyle, you were a therapist for many years, what are your thoughts on this approach?)
- Models desired behavior.
- Pitches in and does some of what team members do, when necessary.
- Knows how to coach and inspire.
- Comfortably relies on the expertise of others.

- Understands and anticipates change.
- Teaches others how to solve problems without solving the problems for them. (Example: Asks team members for their ideas, even you have a good one in mind.)
- Shares credit with team members and ensures that credit goes where credit is due.
- Encourages team members to take responsibility for issues, problems, actions, and projects.
- Understands and acknowledges that people's individual needs (social, personal, career, lifestyle, work preference) affect teamwork and works with, not against those needs.

Manages behaviors

- Defuses any tension in the room.
- Attends to distractions ("let's all put our phones on vibrate).
- Addresses conflict.
- Confronts troublesome behaviors.
- Notices when team members are restless or lethargic.
- Attends to side-bar conversations and manages them.

Finally, refer participants to **Handout 13: TEAM Behaviors** and say that this handout contains a list of behaviors associated with each of the TEAM areas and can be used later as a reference. Suggest that as a Learning Circle Facilitator, they should keep this acronym, TEAM, in mind as they are managing their group.

60. Ask participants how they can ensure cultural responsiveness both in the conduct of the learning circles and in the plans generated by the learning circles. Generate key points such as:

- By using group facilitation skills and including all team members in the discussion, we are being culturally responsive.
- Checking in with the group frequently that the process meets their needs.
- Looking at our action plans through a cultural lens to make sure they address the needs of all cultures affected by the proposed intervention.

Attention to these essential skills will result in more effective learning circles leading to the creation of a learning organization.

Break, 9:45 – 10:00

L. Group Dynamics, 10:00 – 10:45

61. Recognize that managing group dynamics will be the most important aspect of facilitating the learning circles. As the facilitator, you job will be to tap into the group's potential through your facilitation skills. Ask: What are some statements that you can make to encourage dialogue?

Generate some responses such as:

- "Let's go around the circle and see what everyone is thinking".
- "How about people who haven't spoken so far?"
- "What do you think ___________?"
- "Who can sum up the (issue/main/ideas/areas of difference?"

62. Refer participants to **Handout 14: Learning Circle Questions** and ask them to spend a few minutes reviewing this handout and place a check next to the questions they especially like or will most likely use when they are facilitating their own learning circles. Allow a few minutes for them to review this list of questions.

Reconvene the group and ask them to call out the questions they particularly liked.

Trainer Note: *The questions were adapted from:* Hunter, D., Bailey, A., & Taylor, B. (1995). *The art of facilitation.* Cambridge, MA: Fisher Books.

63. Discuss how to get learning circles back on track when things go awry. Say, "Despite the best group facilitation skills, sometimes the group may get off task." Many of the questions on the handout will help you get back on track. Display the **PowerPoint slide: Getting Back on Track.**

Getting Back on Track

Sometimes the group discussion may go awry and drift from the intended content. At those times, the group facilitator's skills are even more important to reel the group back to the intended discussion. Sometimes a simple statement such as, "we seem to be drifting here" or "we seem to be stuck on this point" will help move the conversation back on track. When issues or bad behavior emerges, acknowledge it in a forthright manner and try to ask questions to bring the conversation around. Another technique is to mirror the substance of their opinions and then try to sort out their different thoughts and opinions. Remember, the learning circle is about creating a **learning organization** through a focus on both **content** and **process**.

64. Illustrate how to manage group dynamics with your co-trainer. One trainer acts as the "facilitator" (trainer A) while the other as a 'troublesome' group participant (trainer B). Present the following dialogue. Ask participants how they would respond to the comment to draw them into the discussion.

Trainer Note: Alternatively, do a couple with your co-trainer, then throw the others out to the group first to respond to the "bad" behavior. Provide the context in the bracketed statements.

Trainer A: [Jen has just spent the last 5 minutes going on and on about how her foster parents don't do what they said they would do and people are noticeably agitated.] Then the next thing I want to talk about is how we need to make our contacts on time.

Trainer B: I hear what you're saying and you've made some great points, but let's hear from someone else.

Pause, ask participants for other ways of handling it.

Trainer A: [Jen continues to gripe about the Community Mental Health Provider]. I just want to point out how hard it is to work with that provider and we should really discontinue using them.

Trainer B: Thanks for reiterating that point, as you can see written on the flip chart, you've already mentioned it.

Pause, ask participants for other ways of handling it.

Trainer A: [Jen ignores the trainer and engages in side bar conversation with another participants].

Trainer B: Julie, do you two have something to share with the entire team?

Pause, ask participants for other ways of handling it.

Trainer A: [Jen is rather vocally and very negatively expresses her displeasure about trying out a strategy]. We tried that way before and it just went sideways 'cause no one did it like they were supposed to.

Trainer B: Alex, it doesn't seem that you like that approach. Why? What would you like to see happen?

Pause, ask participants for other ways of handling it.

65. Conduct a small group activity to discuss some of the group dynamics they may face as they conduct the learning circles. Ask participants to get into groups of 4-5 (their table groups if appropriate). Refer them to **Handout 15: My Team's Group Dynamics** and ask them to discuss the questions in their small groups. Refer to the **PowerPoint slide: My Team's Group Dynamics…**The questions are:

1. What are some of the dynamics that might be encountered with my team? List these here.
2. What strategies can be used to address these dynamics?
3. What kinds of statements do you expect to hear during the learning circles (e.g., "this will never work")?
4. For every statement above, devise a rebuttal statement from the information presented on group facilitation.
5. Practice those statements by asking one person to role play that of a worker.
6. Discuss how to keep learning circles a positive experience long term.

Ask participants to spend about 30 minutes in discussion. Ask them to identify particularly clever strategies, rebuttal statements and present these to the larger group. As the small groups are meeting, walk around and identify the major themes that can be used when processing the activity.

66. Bring the group back together and ask each group to present some of their more clever ideas. Applaud all efforts. Acknowledge the challenge of conducting the learning circles but managing the group and creating an effective learning circle are all more than worth the effort.

67. Ask the group for any questions or concerns they might have and respond appropriately.

M. Learning Circle Model Fidelity & Ongoing Evaluation, 10:45 – 11:05

Trainer Note: If possible, ask a member of the evaluation team to present this section.

68. Reiterate that the learning circles are a research project so we are testing whether this intervention works. But it will only work if there is model fidelity. Display the **PowerPoint slide, Model Fidelity: Learning Circles** and review the information below (note this is directly from the **Learning Circle Manual)**:

The Learning Circle evaluation is intended to discover how Learning Circles can help improve the climate and culture of your agency, and provide a way for your unit to work effectively as a team to address agency challenges.   Fidelity to the learning circle approach is critical, therefore, to help us understand the impact of learning circles on your unit and your agency. Fidelity is defined as "adherence to the standards and principles of a program model (Bond, Evans, Salyers, Williams, & Kim,2000). Fidelity to the LC model involves a significant commitment on the part of supervisors to adhere to the basic tenets and principles of the model and to promote their importance to their staff through discussion and modeling. Specific benchmarks will help to assess the fidelity of implementation of the Learning Circle Model at each site:

Refer to the **PowerPoint slide: Fidelity to the LC Model means….**

- Attentiveness to Learning Circle Principles (Do the Learning Circle meetings and subsequent interventions reflect the principles of the Western Workforce model?)
- Occurrence/frequency of meetings (How often do meetings occur and are they fully devoted to the Learning Circle?)
- Adherence to meeting protocol (Do the meetings follow the structure as presented in the Learning Circle manual?)
- Adherence to Team Process of Collaborative Inquiry-(Does the LC team engage in the iterative process of planning, action, reflection, and adaptation?)
- Participation and commitment of team members (Do all team members fully participate in the Learning Circle meetings and subsequent interventions?)

The fidelity and outcome assessment for the evaluation will involve the following methods:

- Baseline survey for staff at the first meeting
- Brief staff survey at the 6-month learning circle meeting
- Brief staff survey at the 12-month learning circle meeting

In addition to the surveys, we ask that all supervisors complete the Learning Circle Meeting Journals after every meeting and send those to the Butler Institute either by email, fax, or mail. These meeting journals will help us learn more about the topics being addressed by your learning circle and how your team is using the LC model to develop strategies and solutions to address the identified topics. They will also help us identify how learning circles may benefit from targeted coaching and technical assistance.

69. Refer to **Handout 16: The Learning Circle Journal** and briefly review the form with participants. Emphasize that this form must be sent to the Butler Institute after each meeting and can be either faxed or emailed. They will be emailed a pdf version to make it easier to fill out.

70. Refer to **Handout 17: Learning Circle Evaluation** and review the evaluation components with participants. Ask for any questions about the evaluation process and respond accordingly.

71. Break early for lunch and suggest that participants use the lunch hour to prepare for conducting their learning circles.

Lunch 11:05 – 12:00

N. Learning Circle Practice, 12:00 – 3:00

72. Conduct the activity to practice facilitating learning circles. Participants should be in groups of 4 people to allow plenty of time for each to facilitate the learning circle. They should follow the protocol established in Section 4 of the Learning Circle manual. Every person will have the opportunity to practice the phases of the PARA process using the protocols and topic exploration questions. Display the PowerPoint slide: Learning Circle Practice. Refer participants to **Handout 18: Learning Circle Practice and Feedback Forms** and review the instructions for the activity presented here also. Tell them that they will be recording feedback for each person on the feedback form. Distribute a "Learning Circle Baton" to each group (this is a plastic Hawaiian lei) to designate the current learning circle facilitator. Direct participants to move to opposite corners of the room or in other empty spaces in the building. Remind participants that they will be asked to provide meaningful feedback to their fellow group members, that is feedback that is specific, behaviorally-anchored, and discuses strengths and areas needing improvement. The instructions for conducting the learning circles are (also on the handout):

1. Determine who will conduct the first learning circle. Other group participants should simulate team members in the group. One person should be assigned the task of notetaker and take complete the Learning Circle Journal for that learning circle simulation. During the learning circle, they may even want to test out some troublesome behaviors to give the facilitator the opportunity to practice managing the group.

2. Commence the learning circle following through the steps in the protocol found in Section 4 of your learning circle manual. The first round should simulate a "PLAN" phase. Allow about 20 minutes for practice. Use the feedback during the Learning Circle to jot down notes about the current facilitator's strengths and needs. Simulate a "real" experience; in other words participants should challenge the facilitator and maybe even "act" out a little so as to give the facilitator the opportunity to practice his/her group management skills.

3. Conclude the Learning Circle. The notetaker should summarize the learning circle by reviewing the notes he/she took during the meeting. Group members should then

provide feedback. Structure the feedback to include areas of strength and needs. Discuss for 5 -10 minutes. Each person should be allotted about 30 minutes. One person in each group should manage the time.

4. Pass the Learning Circle baton to the next group member and commence another learning circle. Assign a different notetaker so that everyone gets a chance to complete the Learning Circle Journal form.

5. Continue until all group members have had an opportunity to practice. If there's still time, do another round, focusing on another phase of the PARA process. Again, using the protocols provided in Section 4 of the Learning Circle Manual.

The feedback form contains the following questions:

1. What were the areas of strength?
2. To what extent did the LC facilitator maintain fidelity to the model?
3. What are areas for improvement?

Trainer Note: During the activity, walk around the room and join groups as appropriate. Take a lead on providing feedback so as to model how to offer effective feedback.

Reconvene the group after all learning circles are complete.

73. Process the learning circle activity. Ask the following questions:

- What did you think? How did they go?
- What was the easiest part? The most challenging?
- What were some of your strengths? Some of your challenges?
- What group management skills did you need to employ? How did that go?
- After this experience, what will you need to work on?
- What more do you need to implement the Learning Circle intervention?

Transition to an introduction to the coaches who will be supporting them as they embark upon learning circles.

74. Announce that now it's time for our "Coaches Corner". Display the **PowerPoint slide, Coaches' Corner.** Make the following points about the coaches (also on the PowerPoint slide):

- Coaches will help you launch your learning circle by providing support either in-person or on the telephone.
- Coaches may attend up to 5 Learning Circle meetings.
- Coaches will administer the baseline survey at the beginning of your learning circle process. They will anonymously collect the surveys, seal them in an envelope and get them to the research team at the Butler Institute.
- Coaches will administer a survey at the third meeting to ensure that the learning circles are being conducted as presented in our model.
- Coaches will be available by phone for consultation to discuss learning circle topics, analyze group dynamics, and problem solve about facilitation issues.
- Coaches are our link between you and the project.

Introduce the coaches for the Learning Circles and ask them to say a few words about themselves and their approach to providing coaching to this cohort.

75.Remind them of the upcoming next steps. Refer them to the **PowerPoint slide: Important Next Steps** and review the following:

- Schedule and hold your introductory LC meeting with Linda/Charmaine
- Schedule the first learning circle meeting with your coach in the next six weeks.
- Following the meeting, send your meeting form to the research team.
- Participate in periodic phone/in-person calls.

76. Conclude the training. Ask participants what they got out of the training, how it impacted them, or even just something they enjoyed about the training.

77. Distribute the training evaluations and remind participants that their detailed feedback is important.

78. Briefly review the next steps. Some time during the next month, a staff person from Butler will come out and deliver an hour orientation to your unit. Within the next two weeks after the orientation, the coach will schedule the first learning circle meeting. The LC Coach will help to co-facilitate the meeting with them; typically the first four to five meetings and then they will be responsible for fully facilitating the learning circle meetings. Your coach will also be available for consultation via phone or email. Once the meeting is over, the LC Facilitators should send their LC Meeting Journal form to the evaluation team at Butler Institute. Over the next few months, we will have periodic phone calls to determine how the learning circles are going and troubleshoot any issues that they may be experiencing. Remind them that their Western Workforce liaison is always

there to answer questions and act as a sounding board. Ask if there are any other questions and respond appropriately.

79. Display the **PowerPoint slide: Thank you & Good Luck.** Adjourn the training.