

CPASS

Personal Assistance Services

for Individuals with Serious Psychiatric Disabilities

Skill Training Curriculum: Coaching Trainer Guide

Louisiana CPASS Program
Louisiana Department of Health and Hospitals
Office of Mental Health

Prepared by
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Acknowledgments

The curriculum to train Personal Assistants has two elements: a competency or skill development component and a didactic or knowledge development component. The skill development components include Connecting, Coaching, Collaborating, and Managing Crises. The knowledge development component is a web-based curriculum entitled *Personal Assistance Services for Individuals with Serious Psychiatric Disabilities*.

This Coaching module is based on the work of colleagues at the Center for Psychiatric Rehabilitation, Boston University. The material is derived and based upon the following:

- Cohen, M. R., Farkas, M. D., & Cohen, B. F. (1986). Coaching the client. *Psychiatric rehabilitation training technology: Functional assessment*. Boston: Boston University, Center for Psychiatric Rehabilitation.
- Cohen, M. R., Nemec, P. B., & Farkas, M. D. (2000). Connecting for rehabilitation. *Psychiatric rehabilitation training technology: Rehabilitation readiness*. Boston: Boston University, Center for Psychiatric Rehabilitation.
- Cohen, M. R., Nemec, P. B., Farkas, M. D., & Forbess, R. (1988). Connecting with clients. *Psychiatric rehabilitation training technology: Case management*. Boston: Boston University, Center for Psychiatric Rehabilitation.

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Trainer Guide Introduction

The Trainer Guide is a resource for trainers who are teaching skills to those who are, or who will be, providing Personal Assistant Services to persons with a psychiatric disability.

The Trainer Guide is a lesson plan for a specific skill set. The four skill sets that comprise the Personal Assistant Services Curriculum include:

- Connecting
- Coaching
- Collaborating
- Managing Crises

Each lesson plan is divided into five sections:

- Review—Skill set is introduced.
- Overview—Key information about the skill set is presented.
- Presentation—Specific skills are taught.
- Exercise—Trainees’ learning is consolidated.
- Summary—Learning experience is reviewed.

The approach to skill training is Direct Skills Teaching. In a classroom setting, trainees learn how to perform new skills from:

- The information that the trainer imparts to them about the skill.
- Observing examples of the skills being performed.
- Having opportunities to practice the skill.

In the lesson plan the knowledge presented is written as a “Tell,” the examples as a “Show,” and the practice opportunities as a “Do.”

Preparation is key in training. Trainers are encouraged to read relevant literature about Personal Assistant Services as well as recovery and rehabilitation prior to the training. Trainers are encouraged to learn about the people they will be training, their background, their experiences, and their settings.

While there is a sample schedule provided with each lesson plan, this is intended as a guide only, and the trainer will need to give thought to the parameters of the particular training experience as they plan their training schedule and prepare for the training session.

Training is a process and a trainer’s ability to engage and respond to the trainees in the moment and to modify the lesson plan as needed is key to a successful training experience.

Training Evaluation

It is helpful for the trainer to get feedback on how much the participants have learned in the course of the training program you have conducted. Feedback allows you to modify the lessons for the next time you teach. A copy of the Training Pretest/Posttest is included at the end of each Trainee Workbook and Trainer Guide. Trainees should be asked to complete the test at the beginning of the training, and again at the very end of training. These tests have been constructed to evaluate training that is done for all four of the modules in the PAS Skill Training Curriculum. If you are not conducting training in all four modules, you can modify the tests to eliminate those questions that relate to the modules you are not teaching.

You will need to adapt the sample session schedules as needed to allow time for this testing. Given the range of participants likely to take this type of training, it is useful to allocate between 20 to 45 minutes to allow the participants to read the questions, write the answers, and shift their focus back to the overview you will be providing next. Often it is useful to schedule a small break of about 5 to 10 minutes after the testing to allow for a positive transition.

Pretest Evaluations

After you have given your introduction to the training and before you provide an overview of the materials, ask trainees to complete the test as a pretest, or evaluation of the trainees' current level of knowledge. If your participants already know a lot of the material you can modify your curriculum to shorten the explanations or descriptions. If they know very little, then the curriculum can be taught just as is.

Posttest Evaluations

After you finish summarizing the modules you have taught, ask trainees to complete the tests again as a posttest, or evaluation of the knowledge and skills developed.

If you find that your participants in different trainings consistently are not learning a certain aspect of a skill, you can spend more time on that aspect or add more examples as needed, either as a follow up to this training, or for the next time you teach this material to another group.

On the other hand, if you move through the material quickly and your participants still can acquire the skills you have been teaching, perhaps you can modify some parts of the lesson to shorten the overall time spent doing that part of the training.

Coaching Session—Sample Schedule

Day 1

9:00AM	–	9:30AM	Welcome and Introductions
9:30AM	–	10:15AM	Personal Assistance Services: Skills Training Curriculum
10:15AM	–	10:30AM	Break
10:30AM	–	11:15AM	Coaching Review
11:15AM	–	12:00PM	Coaching Overview
12:00PM	–	1:00PM	Lunch
1:00PM	–	2:15PM	Presentation 1: Giving Directions
2:15PM	–	2:30PM	Break
2:30PM	–	4:00PM	Presentation 2: Encouraging
4:00PM	–	4:30PM	Review of Day

Day 2

9:00AM	–	9:15AM	Review of Day 1
9:15AM	–	10:15AM	Presentation 3: Giving Feedback
10:15AM	–	10:30AM	Break
10:30AM	–	12:00PM	Coaching Exercise
12:00PM	–	1:00PM	Lunch
1:00PM	–	2:15PM	Coaching Exercise continued
2:15PM	–	2:30PM	Break
2:30PM	–	4:00PM	Coaching Exercise continued
4:00PM	–	4:30PM	Coaching Summary

Personal Assistance Services Training Introduction

Tell: The focus of our skill training is Personal Assistance Services.

Ask: What are Personal Assistance Services?

Discuss: Personal Assistance Services.

Ask: What is the role of a Personal Assistant?

Discuss: Role of a Personal Assistant.

Ask: Who do Personal Assistants work with?

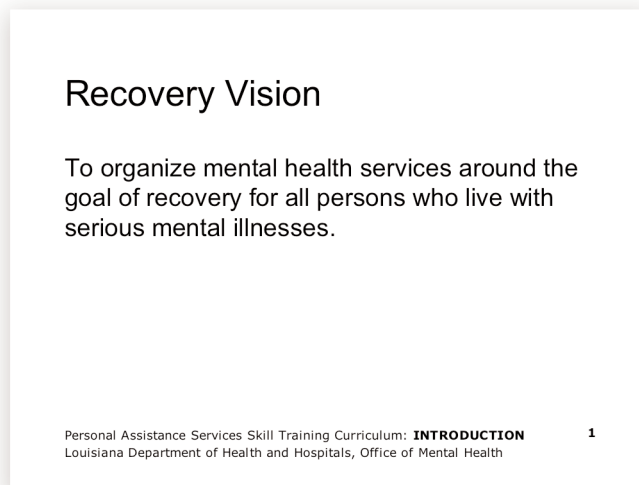
Discuss: Target population: People with psychiatric disabilities.

Ask: What experience have you had in assisting others? Who did you work with? What did you do?

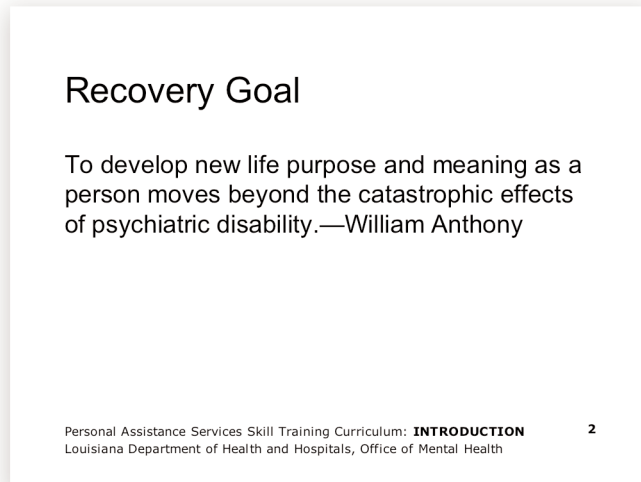
Discuss: Trainees' experiences.

Tell: Recovery is the vision for people with psychiatric disabilities.

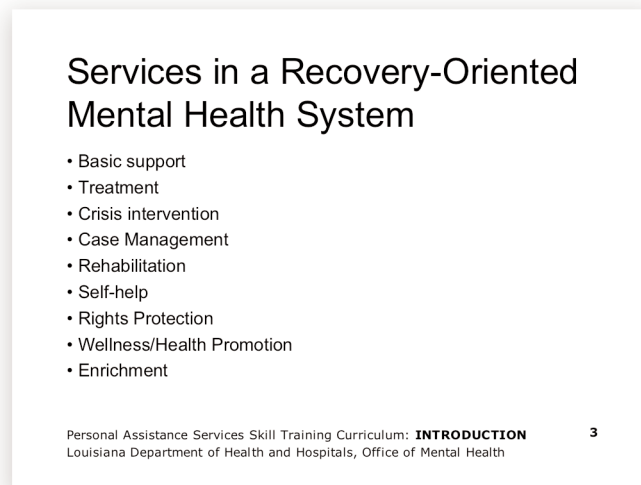
Show: Introduction Slide 1: *Recovery Vision*



Discuss: The recovery vision.

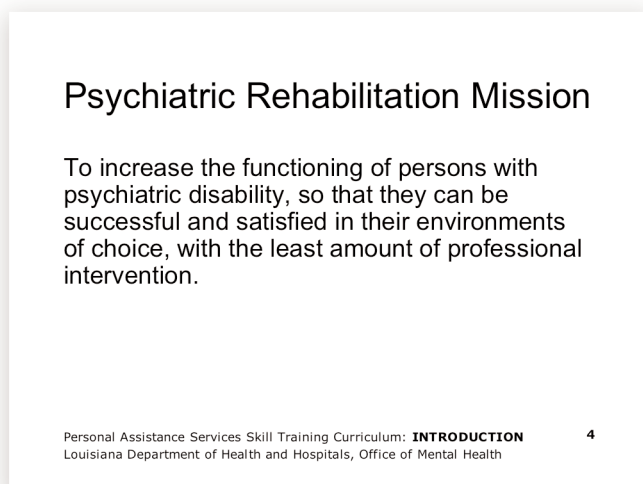
Show: Introduction Slide 2: *Recovery Goal*

- Discuss:**
- The goal of recovery.
 - Important services in a recovery-focused system (basic support, treatment, crisis intervention, rehabilitation, self-help, advocacy, wellness/health promotion, and case management).
 - Distinguish the services—in particular, *treatment vs rehabilitation*.

Show: Introduction Slide 3: *Services in a Recovery-Oriented Mental Health System*

Tell: Psychiatric rehabilitation is an important service to people recovering from a psychiatric disability. In rehabilitation, the primary interventions are developing skills and supports. Providing support is the focus of the work of Personal Assistants.

Show: Introduction Slide 4: *Psychiatric Rehabilitation Mission*



Psychiatric Rehabilitation Mission

To increase the functioning of persons with psychiatric disability, so that they can be successful and satisfied in their environments of choice, with the least amount of professional intervention.

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Discuss: Role of support in the recovery of people with psychiatric disabilities.

Show: Introduction Slide 5: *Psychiatric Rehabilitation Interventions*



Psychiatric Rehabilitation Interventions

- Developing Skills
- Developing Supports

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Ask: How might a Personal Assistant support people with psychiatric disabilities?

Tell: Either by providing the support themselves or by gathering instruments of support for the person.

Ask: What are some examples of when a Personal Assistant would provide the support themselves? What are some examples of instruments of support; the types of support that a Personal Assistant may help a person acquire?

Discuss: The training format.

Tell: There are four skill sets that you will be learning during the Personal Assistance Services Skill Training.

Review: Curriculum Outline (page 2 in the Trainee Workbook).

Connecting

- Listening
- Demonstrating Understanding

Coaching

- Giving Directions
- Encouraging
- Giving Feedback

Collaborating

- Defining Goals
- Disagreeing
- Resolving Conflict

Managing Crises

- Developing a Crisis Plan
- Assessing Critical Information
- Implementing an Action Plan

Show: Introduction Slide 6: *Personal Assistance Services Skill Training Curriculum*

Personal Assistance Services Skill Training Curriculum

- Connecting
- Coaching
- Collaborating
- Managing Crises

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- Tell:**
- The first set of skills, *Connecting Skills*, relates to forming a relationship with the person the Personal Assistant intends to support.
 - The second set of skills, *Coaching Skills*, is what the Personal Assistant uses to help a person through an activity; the skills involved in assisting the person to do something.
 - The third set of skills, *Collaborating Skills*, relates to the working relationship between the person and the Personal Assistant.
 - The fourth set of skills, *Managing Crises Skills*, involves handling a difficult or dangerous situation that threatens the health and/or safety of the person the Personal Assistant is supporting.

Coaching Review

Tell: The skills that we will be focusing on during this training are Coaching skills.

Ask: What comes to mind when I say “Coaching”?

Discuss: Learners’ images and understanding of the term Coaching.

- Tell:**
- Coaching is helping a person to participate in activities.
 - Let’s talk about your experiences with coaching; your experiences in being coached by someone else, as well as your experiences as a coach.

Discuss: Different types of coaching experiences (positive as well as negative experiences).

- Ask:**
- What are the characteristics of a good coach?
 - What other coaching training opportunities have you had?

Discuss: Explore trainees’ prior learning experiences.

Coaching Overview

Review: Coaching Introduction (page 3 in the Trainee Workbook).

What is Coaching?

Coaching means assisting a person to participate in activities.

Why do Personal Assistants need to learn to coach?

Coaching encourages a person to perform activities more independently.

What are the skills of Coaching?

1. Giving Directions
2. Encouraging
3. Giving Feedback

When do Personal Assistants use Coaching skills?

When they are assisting a person to perform an activity.

Tell: (*What*) Coaching means assisting a person to participate in activities.

Show: Coaching Slide 1: *Definition of Coaching*

Definition of Coaching

Coaching is assisting a person to participate in an activity.

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Ask: What are some examples of activities that a Personal Assistant might support someone in doing?

Discuss: Typical activities.

Tell/Do: I'd like to show you an example of Coaching. Turn to the Coaching Example on page 4 in the Trainee Workbook. This is an interchange between Barry and Joe. Read the introduction and ask for volunteers.

Coaching Example (page 4 in the Trainee Workbook)

Barry and Joe are planning a trip to the grocery store. Barry is assisting Joe to write a list of needed food and household items.

Barry: When planning a trip to the grocery store it's best to prepare a written list of what you need—for both food and household items like toothpaste and dish soap. Writing it down and carrying the list to the store helps us make sure that we buy what you need most. So what should we do first?

Joe: I have a pen and paper.

Barry: Good. Thank you. Do you want to write or shall I do the writing?

Joe: You can write.

Barry: Okay. I'll write. You can look around the kitchen and think about what you need at the store. Before you start searching, is there anything you know you need for groceries?

Joe: Orange juice.

Barry: Okay. I'll write that down. Is there anything else you need?

Joe: I don't know.

Barry: Okay. Now, you need to be more organized in your search for needed groceries. First, open the refrigerator and go through a checklist in your head. Milk? Eggs? Butter? Catsup? Cheese? Fruit? Vegetables?

Joe: I need milk, peaches, and lettuce.

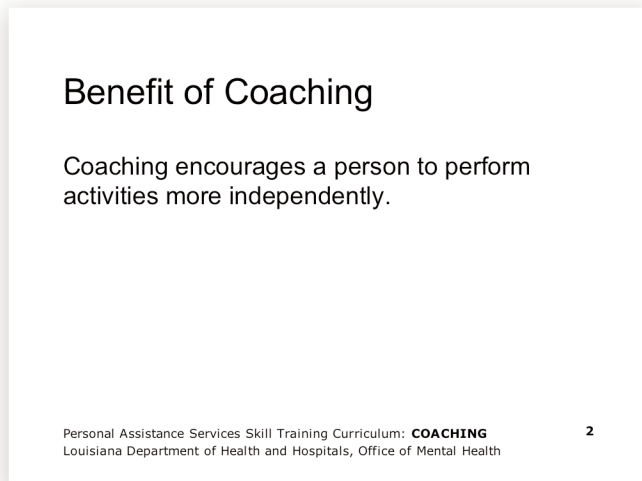
Barry: Good job! You were very thorough checking all parts of the refrigerator for the things you might need. Next, check the cupboard and use another checklist. Cereal? Bread? Crackers?

Discuss: The ways that Barry coached Joe through the activities.

Ask: (Why) What are the benefits of coaching?

Tell: Coaching encourages a person to perform activities more independently.

Show: Coaching Slide 2: *Benefit of Coaching*

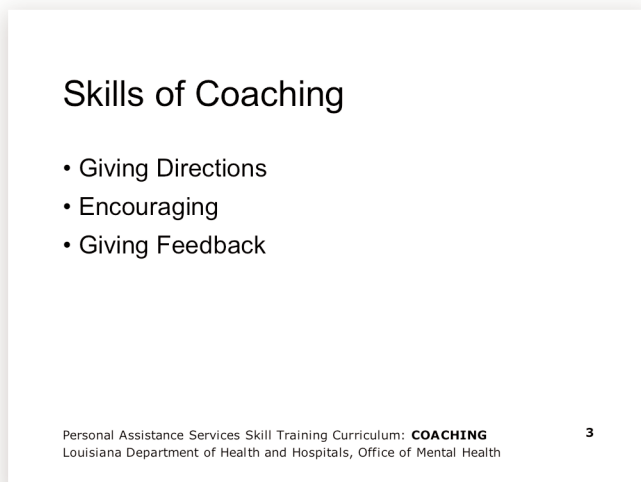


Tell: Traditionally helpers do tasks for the person. In this relationship, the role of the Personal Assistant is to encourage a person to do the task or activity by himself or herself. Coaching skills help guide the person through an activity or task.

Review: (*How*) There are three coaching skills:

1. Giving Directions
 2. Encouraging
 3. Giving Feedback
- *Giving Directions* is providing the person with specific information about how to do something.
 - *Encouraging* is promoting confidence in the person that you are assisting.
 - *Giving Feedback* is critiquing the tasks or behaviors that the person has done.

Show: Coaching Slide 3: *Skills of Coaching*

A white rectangular slide with a light gray border. The title "Skills of Coaching" is centered at the top. Below it is a bulleted list of three items: "Giving Directions", "Encouraging", and "Giving Feedback". At the bottom left, there is small text: "Personal Assistance Services Skill Training Curriculum: COACHING" and "Louisiana Department of Health and Hospitals, Office of Mental Health". At the bottom right, the number "3" is displayed.

Skills of Coaching

- Giving Directions
- Encouraging
- Giving Feedback

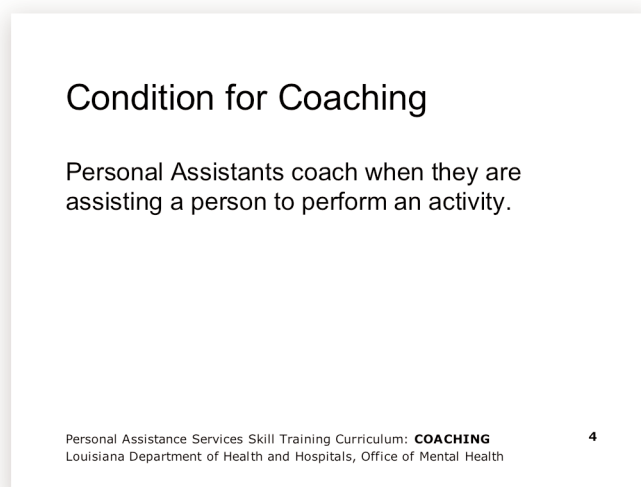
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Ask: When do you coach a person?

Tell: (*When*) When you are assisting a person to perform an activity.

Show: Coaching Slide 4: *Condition for Coaching*

A white rectangular slide with a light gray border. The title "Condition for Coaching" is centered at the top. Below it is a paragraph: "Personal Assistants coach when they are assisting a person to perform an activity." At the bottom left, there is small text: "Personal Assistance Services Skill Training Curriculum: COACHING" and "Louisiana Department of Health and Hospitals, Office of Mental Health". At the bottom right, the number "4" is displayed.

Condition for Coaching

Personal Assistants coach when they are assisting a person to perform an activity.

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Coaching Presentation 1: Giving Directions

Review: Giving Directions Introduction (page 5 in the Trainee Workbook)

What is Giving Directions?

Giving Directions is providing a person with specific information about how to do something.

Why do Personal Assistants need to give directions?

Personal Assistants Give Directions in order to clarify what a person needs to do when they perform an activity.

How do Personal Assistants give directions?

Giving Directions skills include:

- Orienting
- Instructing

When do Personal Assistants give directions?

Personal Assistants use the skills of Giving Directions when they are guiding a person through an activity.

Tell: The first Coaching skill is Giving Directions. Giving Directions is providing the person with specific information about how to do something.

Show: Coaching Slide 5: *Definition of Giving Directions*

Definition of Giving Directions

Giving Directions is providing the person with specific information about how to do something.

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- Tell:**
- There are two common types of directions: Orientation and Instructions.
 - An Orientation is a preview of an activity. It gives information about the activity that the person is about to do. An orientation is given before the activity begins.
 - An orientation includes:
 1. What: A description of the activity
 2. Why: The purpose or benefits of the activity
 3. Roles: The personal assistant's task and the person's tasks.

Show: Common Types of Direction (page 6 in the Trainee Workbook)

Orienting

An Orientation gives the person a preview of the activity ahead. An orientation is given before the activity begins.

An orientation includes:

What: A description of the activity.

Why: The purpose or benefits of the activity.

Roles: The personal assistant's tasks and the person's tasks.

Example of an Orientation

Now I am going to demonstrate how to sort laundry. Sorting laundry makes sure that clothes that are similar in color and fabric are washed together so that they get clean and the colors don't stain each other. For example, never wash a red t-shirt with white underwear or else you will have pink underwear. I want you to watch me and listen to my directions. Later, I'll ask you to show me how you would sort these loads of laundry.

Do: Read the orientation example.

Discuss: The orientation example.

- Tell:**
- The other common type of direction is Instructions.
 - Instructions give information about the specific behaviors to be performed by the person during the activity.
 - Characteristics of good instructions are:
 1. Behavioral: They describe the specific steps or actions that the person needs to perform during the activity.
 2. Clear: They use language that the person understands and/or illustrates exactly what the person needs to do.

Show: Common Types of Direction (page 6 in the Trainee Workbook)

Instructing

Gives information about the specific behaviors to be performed by the person during the activity.

Characteristics of instructions:

Behavioral: Describes specific actions that need to be performed. Describe exactly what the person needs to do.

Clear: Use language the person understands and/or illustrates exactly what the person needs to do.

Example of Instructions

- Take the clothes and put them into the laundry basket.
- Pour the laundry detergent to the full line in the measuring cup and pour it evenly over the clothes in the washing machine.

Do: Read the instructions example.

Discuss: The instructions example.

Tell/Do: Turn to the Example of Giving Directions on page 7 in the Trainee Workbook. Invite two participants to roleplay Beth and Nancy.

Example of Giving Directions (page 7 in the Trainee Workbook)

Beth is Nancy's Personal Assistant. She is helping Nancy to do her laundry. Beth is giving Nancy directions on using the washing machine.

Beth: Nancy, now that you've sorted the clothes, you're going to use the washing machine. Have you used the washing machine before?

Nancy: I haven't used this machine. I used to wash clothes at my mother's house, but her machine was a lot different from this one. This one looks complicated.

Beth: Okay. You have some experience. That's great. How is it going to help for you to know how to use this machine?

Nancy: I want to be able to do my laundry here at my apartment whenever I need to. I have been afraid to come down here because I don't know anyone. I don't like talking to people I don't know. I'll feel more confident if I know how to use the machine.

Beth: Okay, let's get started.

Now I am going to demonstrate how to wash clothes using this machine. First, I will demonstrate all the steps while I describe how to use it. You will listen and watch me carefully. Then I'll take the clothes out, and ask you to do the steps yourself. I will be watching you carefully to make sure everything goes okay.

Is it clear to you what we're going to do?

Nancy: You're going to show me how to do it, and then I'm going to use the machine myself.

Beth: Perfect. That's it exactly! Let's begin.

We start by putting the clothes into the machine. Distribute the clothes evenly and loosely around the drum of the machine. This part of the machine is called the drum. It's important that you do not overload the machine because clothes do not get clean.

Nancy: Okay. That looks good.

Beth: Now I want you to try this part of washing the clothes. I'll take the clothes out, and you're going to distribute the load exactly as I showed you.

Nancy: Okay. Let me try.

Discuss: The statements that are part of the Orientation; the statements that are Instructions.

Tell/Do: I'd like to give you an opportunity to Give Directions. First, I want you to write an orientation. Turn to the Orienting Exercise on page 8 in the Trainee Workbook. Read the exercise instructions.

Orienting Exercise (page 8 in the Trainee Workbook)

You are assisting Peggy to prepare a grocery list. She has never independently prepared a list of groceries that she needed for shopping. Write word-for-word what you would say to orient her to this task. Remember parts of an orientation include the What, Why, and Roles.

Tell: Remember, the orientation precedes the activity. It is given prior to the activity.

Discuss: Examples of participants' Orientations. Highlight the What, Why, and Roles.

Tell/Do: Continuing with the practice, I want you to "Give Instructions." Turn to the Instructing Exercise on page 9 in the Trainee Workbook. Read the exercise instructions.

Instructing Exercise (page 9 in the Trainee Workbook)

You continue assisting Peggy to write her grocery list. Walk through the task in your mind, and imagine the detailed steps needed to accomplish the task of writing a grocery list. Write down the instructions you would give to Peggy to assist her to write a grocery list.

Tell: Consider how to instruct the person to begin the activity, how to instruct them as to what they are to do during the activity, and how they need to end the activity.

Discuss: Examples of participants' Instructions. Highlight the characteristics: behavioral, clear.

Coaching Presentation 2: Encouraging

- Tell:**
- There are three coaching skills:
 1. Giving Directions
 2. Encouraging
 3. Giving Feedback
 - Encouraging is the second Coaching skill.
 - Encouraging is promoting confidence in the person you are assisting.

Review: Encouraging Introduction (page 10 in the Trainee Workbook)

What is Encouraging?

Encouraging is promoting confidence in the person the Personal Assistant is supporting.

Why do Personal Assistants need to learn to encourage?

Personal Assistants want to actively involve the person in an activity or task. Encouraging increases the person's commitment to and participation in the activity or task.

How do Personal Assistants encourage?

Encouraging skills include:

- Praising Efforts
- Praising Accomplishments
- Modifying Directions

When do Personal Assistants offer encouragement?

When guiding a person through an activity or task.

Ask: Why might you need to build the person's confidence?

Discuss: Reasons for building confidence.

Show: Coaching Slide 6: *Definition of Encouraging*

Definition of Encouraging

Encouraging is promoting confidence in the person that you are assisting.

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Tell: There are three effective encouraging techniques:

- Praising Efforts
- Praising Accomplishments
- Modifying Directions

Tell/Do: Turn to Types of Encouraging on page 11 in the Trainee Workbook

Types of Encouraging (page 11 in the Trainee Workbook)

Praising Efforts

Praising Efforts means complimenting the attempts that the person has made to perform the activity or task.

Example: You've really worked hard on reorganizing the living room.

Praising Accomplishments

Praising Accomplishments means complimenting the outcome of the person's efforts.

Example: You look terrific today. I like the way you've fixed your hair.

Modifying Directions

Modifying Directions means changing the instructions you have given to the person to make it easier for him or her to perform the task.

Example: Let's try it another way. Instead of using different cups, use the same measuring cup each time you do laundry.

Tell: *Praising Efforts* means complimenting the person's attempts that the person has made to perform the task.

Do: Read the example of Praising Efforts: "You've really worked hard on reorganizing the living room."

Tell: *Praising Accomplishments* means complimenting the outcome of the person's efforts.

Do: Read the example of Praising Accomplishments: "You look terrific today. I like the way you've fixed your hair."

Tell: *Modifying Directions* means changing, in the moment, the instructions you have given to the person in order to make it easier for him/her to perform the task.

Do: Read the example of Modifying Directions: "Let's try it another way. I wonder if it would be better if we used the same measuring cup each time we do laundry?"

Tell/Do: Turn to the Encouraging Example on page 12 in the Trainee Workbook. Invite participants to roleplay Alisha and Peggy. Read the instructions.

Encouraging Example (page 12 in the Trainee Workbook)

Alisha is assisting Peggy to be more successful in living in her own apartment. Grocery shopping and budgeting are two critically important skills that Peggy needs to perform. Today, Alisha is helping her with the skill of writing a grocery list.

Alisha You've written "orange juice" and "skim milk" on your list. Very good start. While you're looking in the refrigerator, is there anything else you need?

Peggy It looks like I am out of salad dressing. I need French and Ranch dressing.

Alisha Good eye! I often forget things like dressing until I make a salad and realize that I am out. Go ahead and write that down. Is there anything else you need?

Peggy No, I don't think so.

Alisha: Sometimes it helps to think about meals you frequently prepare to find items that you need.

Peggy: I only have 2 eggs. Maybe I should buy eggs.

Alisha Great. Write that on your list.

Let's look in the cupboard where you store other food. Is there anything else you need there?

Peggy I know I need soda and potato chips.

Alisha Okay. Put those on the list. Thinking about meals for next week, is there anything else you need to buy?

Peggy I am out of spaghetti. I have all this tomato sauce. Oh yeah, and Parmesan cheese. I need more salad stuff too.

Alisha Okay, write those down. You're doing a great job with this list. It really helps when you to think about meals for the week.

Discuss: The specific ways that Alisha encourages Peggy. Highlight Praising Efforts, Praising Accomplishments, and Modifying Directions.

Ask: (Why) Why do Personal Assistants use encouragement?

Tell: Encouragement techniques increase the participation and confidence of the person with whom you are working.

Tell/Do: Turn to the Encouraging Exercise on page 13 in the Trainee Workbook. Now, I'd like to give you an opportunity to write some encouraging statements. Add a few more of your own to the examples listed.

Encouraging Exercise (page 13 in the Trainee Workbook)

In this exercise there are several examples of encouraging. Please read the examples for each type of encouragement and then add a few examples of your own.

Praising Efforts

- I see how committed you are to succeeding here in your own apartment.
- I've noticed how much effort you put into learning everyone's name at the social club.

Praising Accomplishments

- You've been living in this apartment for 6 months now. You're doing so well. I think that this calls for a celebration.
- You've done a great job with the kitchen this week. Everything is so organized and so clean.

Modifying Directions

- Maybe we should break things down into smaller steps. It seems a lot to do all at once.
- When centering yourself, sometimes it is helpful to focus on the sensation of gravity pressing your feet against the floor.

Discuss: Participants' examples.

Coaching Presentation 3: Giving Feedback

Review: There are three Coaching skills:

- Giving Directions
- Encouraging
- Giving Feedback

Tell/Do: Turn to Giving Feedback Introduction on page 14 in the Trainee Workbook.

Giving Feedback Introduction (page 14 in the Trainee Workbook)

What is Giving Feedback?

Giving Feedback is critiquing the tasks or behaviors the person has done.

Why do Personal Assistants need to give feedback?

Giving Feedback provides the person with important information about how they performed the activity; what they did well and what areas need improvement.

How do Personal Assistants give feedback?

- Ask person to conduct a self-assessment.
- Share your perspective.

When do Personal Assistants give feedback?

Give feedback when someone has completed an activity or performed a task.

Steps for Giving Feedback

Ask the person to critique his or her performance:

- Overall
- Areas of strength
- Areas for improvement

Share your perspective:

- Overall
- Areas of strength
- Areas for improvement

Tell: (*What*) Giving Feedback is critiquing the tasks or behaviors the person has done.

Discuss: Participants' experiences with giving and receiving feedback.

Tell/Do: Turn to the Giving Feedback Example (Matt and Mike) on page 15 in the Trainee Workbook. Read the example.

Giving Feedback Example (page 15 in the Trainee Workbook.)

Mike and Matt are working together. Mike is helping Matt learn how to grocery shop. They're in the store nearing the checkout line, and Mike is giving Matt feedback on how he did in selecting items in the store.

Mike: Okay, Matt. We're at the checkout line now. You've finished selecting all the items that you wanted to buy. Let's take a minute to talk about how it went. Is that okay?

Matt: Sure. That's okay.

Mike: So, how do you think you did selecting grocery items today?

Matt: Um. Good. I was pretty fast at it. I remembered almost everything on my list. You had to remind me to slow down and get some bread, but that is all that I forgot, I think.

Mike: I agree, Matt. You remembered almost everything this week. That was great. I saw that you referred to your own list a couple of times to make sure you didn't forget anything. You did that without having me reminding you to look at the list.

Matt: Yeah. I remembered everything, except the bread. You only had to tell me about the bread.

Mike: You were great at remembering and using the grocery list this week. You said that you were pretty quick, and I have to agree. You move through this store very quickly. In fact, that is the one thing I'd like you to do differently next time. I want you to move less quickly. Sometimes you're moving so fast that I fear you might hit someone with the cart. I worry about that. Please move more slowly, more carefully through the store with the cart, Matt.

Matt: Okay, Mike. I'm always in a hurry to get out of the grocery store.

Mike: You feel rushed, but we really have plenty time today. My grandfather always said, "Don't hurry or you'll be late."

Matt: Don't hurry or you'll be late? Your grandfather is a funny guy.

Mike: It means, sometimes when we rush, things go wrong, and it ends up costing us more time.

Discuss: Participants impressions: how feedback was given and how it was received.

Ask: Why is it important to give people feedback?

Tell: (*Why*) Giving Feedback provides the person important information about how they performed the activity: what they did well and what areas need improvement. Feedback helps the person to improve their performance of the activity. As a Personal Assistant you are teaching a person to do things for themselves. As people learn new skills, they need information on what they did well and what areas need improvement.

Discuss: The characteristics of good feedback are:

- Involving
- Descriptive
- Balanced
- Objective

Review: Characteristics of Good Feedback (page 16 in the Trainee Workbook)

Involving

Encourages the person's participation in the feedback.

Descriptive

Presents a clear picture of the person's performance.

Balanced

Describes both strengths and areas for improvement.

Objective

Focuses on the task and not the person.

Tell: (*How*) There are two steps involved in Giving Feedback:

- Ask the person to conduct a self-assessment: overall, what went well, and areas for improvement.
- Share your perspective: overall, what went well, and areas for improvement.

Review: Steps for Giving Feedback (page 17 in the Trainee Workbook)

Ask the person to critique his or her performance

1. Overall
2. Areas of strength
3. Areas for improvement

Share your perspective

1. Overall
2. Areas of strength
3. Areas for improvement

Discuss: The importance of the other person commenting on their performance before the Personal Assistant. Incorporating what the person has said into feedback; being additive not repetitive.

Ask: When do you give feedback?

Tell: (When) You give feedback when someone has completed an activity or performed a task.

Tell/Do: Turn to the Giving Feedback Exercise on page 18 in the Trainee Workbook. As well as indicating “good” or “poor,” encourage participants to suggest how each of the examples do or do not meet the characteristics of good feedback.

Giving Feedback Exercise (page 18 in the Trainee Workbook)

Read each example of Giving Feedback. Decide whether you think the example is good or poor. If you think it's a poor example, describe which characteristics of good feedback are missing.

Feedback Example	Good	Poor
<p>1. The closet is still a mess. You didn't hang up all the clothes. Your shoes are in a pile, and a lot of stuff is still disorganized.</p> <p>Comments:</p>		
<p>2. I agree that you did a good job sorting the clothes. You've divided all your clothes into two loads, dark and light. You washed the clothes and dried the clothes. I would say that the only area for improvement is drying the towels for a longer period of time. They're folded nicely, but they're still damp.</p> <p>Overall, you did an excellent job.</p> <p>Comments:</p>		
<p>3. Very good! Good job on the kitchen. I like the way you reorganized the countertop.</p> <p>Comments:</p>		
<p>4. You did it again. Don't put dirty clothes on top of clean clothes in the laundry basket. Then we have to rewash them all again.</p> <p>Comments:</p>		

Review: The Feedback Loop (page 19 in the Trainee Workbook)

The feedback loop is a method for critiquing your own or another person's performance.

Characteristics

- Objective: uses a list of standards to evaluate the performance.
- Specific: details the behaviors performed.
- Personalized: is 'tailor-made' for the individual.
- Balanced: includes strengths and areas for improvement.

Structure

1. Overall impression.
2. Strengths of the performance.
3. Areas for improvement.

Order

1. Person performing starts.
2. Person participating in the performance goes next.
3. Person observing goes last.

Example

Person who performed:

Overall I think it went pretty smoothly. I was more comfortable than I thought I would be. I was really well prepared. My strengths were that I oriented the class well to the presentation. I made good eye contact, and I think the pace of the presentation was good. What I would like to improve: I need to listen better when people are asking questions. I started answering Jeff's question before I really understood what he was asking.

Person participating in the performance:

Overall it was a great presentation with lots of useful information. You obviously know your stuff. I agree with you on your strengths, the pace was perfect. You slowed down and explained a point just when I was feeling confused. I would add that you did really do a nice job engaging us in the learning by asking us about our experiences. In terms of area for improvement: I think you're right in terms of taking more time to listen and understand the question before answering. And another area might be giving fewer handouts. I felt overwhelmed by all the information you gave me. It was a really good presentation.

Discuss: The Feedback Loop.

Coaching Exercise

Tell/Do: Turn to Coaching Exercise on page 20 and the Coaching Checklist on page 21 in the Trainee Workbook. Read the Instructions out loud, ensuring that the participants are clear about the steps and have the resources needed to complete the exercise. Encourage them to take time to prepare. The exercise can be done in pairs or triads (with one person being the observer and feedback loop facilitator). Participants should use the checklist to make sure they have used all the skills of Coaching.

Coaching Exercise (page 20 in the Trainee Workbook)

In this exercise you will teach your partner how to create a daily schedule. As you teach the skill, you will use Coaching skills to assist your partner to perform the skill independently. Use the Coaching checklist on the following page to make sure that you have used all the skills of Coaching.

Before you begin:

1. Write out an orientation to create a daily schedule.
2. Organize the materials you will need:
 - Example of daily schedule
 - Blank schedule
 - Paper
 - Pens/pencil
3. Prepare yourself to coach.

Exercise:

1. Orient your partner to the activity.
2. Discuss with your partner about how learning the skill of creating a Daily Schedule may be useful to him or her.
3. Show an example of a daily schedule, and discuss the features of the schedule: the tasks listed, variety of tasks, size of tasks, timelines estimated, etc.
4. Teach the steps of creating a daily schedule:
 - List the necessary tasks
 - List the desired tasks
 - Prioritize tasks
 - Evaluate fit
5. Ask the learner to create a daily schedule for a day of their choosing.
6. Give feedback using the feedback loop.
7. Review activity.
8. Discuss the experiences the learner had with doing the exercise. (i.e. Was it easy or difficult? Was the exercise enjoyable or not? Do they feel confident about doing the activity on his/her own?)
9. Discuss how the learner might use the activity. What might get in the way of them using the activity?

Coaching Checklist (page 21 in the Trainee Workbook)

Skill	Skill Use		Comments
	Yes	No	
Orienting			
Instructing			
Praising Efforts			
Praising Accomplishments			
Giving Feedback			
• Involving			
• Descriptive			
• Balanced			
• Objective			

Discuss: The trainees’ experience of the exercise, including their overall strengths and areas for improvement.

Coaching Summary

Review: During the training we focused on the Coaching skill sets. Let's review the key information about Coaching.

Ask: What is Coaching?

Tell: (*What*) Coaching means assisting a person to participate in an activity.

Ask: What are the benefits of Coaching?

Tell: (*Why*) Coaching helps the person to perform activities more independently.

Ask: What are the three Coaching skills?

Tell: (*How*) The three Coaching skills are:

1. Giving Directions
2. Encouraging
3. Giving Feedback

Ask: When do you coach a person?

Tell: (*When*) When you are assisting a person to perform an activity.

Discuss: The training experience. Next skill set and training session.

Personal Assistant Services

1. What is a Personal Assistance Service?

2. What is the role of a Personal Assistant?

3. What are the tasks of a Personal Assistant?

4. What are the critical skills that a Personal Assistant performs?

Recovery and Rehabilitation

1. What is the recovery vision?

2. What is the goal of recovery?

3. What is the mission of psychiatric rehabilitation?

4. What are the primary rehabilitation interventions?

Connecting

1. What is Connecting?

2. Why is it important for a Personal Assistant to connect with the person that they are working with?

3. Two Connecting skills are Listening and Demonstrating Understanding:

- Listening—Listening involves three steps: 1) Preparing, 2) Attending, and 3) Recalling. Briefly describe what a Personal Assistant would do when they are Preparing, Attending, and Recalling:

Training Pretest/Posttest

- Demonstrating Understanding—There are two skills in Demonstrating Understanding: 1) Paraphrasing and 2) Responding to Feeling

Assume that you are the person's Personal Assistant. Read the following statement:

I never knew they'd give me someone like you to help me with stuff at home. I didn't let my doctor or nurse know how bad things have gotten around here since my sister died because I thought they'd make me go to a home.

Write down how you would paraphrase what they have shared with you:

You can see what a mess this place is. It just got away from me. I plan to pick up and put things away, but now it's so bad I don't know where to begin.

Write down your response to the feelings the person has expressed:

4. When do Personal Assistants use Connecting skills?

Coaching

1. What is Coaching?

2. What are the benefits of Coaching?

3. There are three Coaching skills: 1) Giving Directions, 2) Encouraging, and 3) Giving Feedback:

- Giving Directions—Two types of directions are: 1) Orientations and 2) Instructions
What is the difference between the two?

- Encouraging—There are three techniques for encouraging: 1) Praising Efforts, 2) Praising Accomplishments, and 3) Modifying Directions

Create a brief example of one of the techniques for the skill of washing clothes.

Training Pretest/Posttest

- Giving Feedback

What are the characteristics of good feedback?

4. When do Personal Assistants coach a person?

Collaborating

1. What is Collaborating?

2. Why is it important that Personal Assistants collaborate with the person that they are working with?

Training Pretest/Posttest

3. Collaborating skills include Defining Common Goals, Disagreeing, and Resolving Conflict:

- Defining Common Goals—Briefly describe how to define common goals?

- Disagreeing—Write down what you might say in Disagreeing with the following statement:
My case manager said that you had to clean my kitchen when you're here today. She told me that it was your job to do the housework and that we shouldn't be spending time goofing around. She wants you to do your work when you're here.

- Resolving Conflict—What is the difference between a disagreement and a conflict?

4. When do Personal Assistants use Collaborating skills?

Managing Crises

1. What is Managing Crises?

2. Why is it important for Personal Assistants to be able to manage crises?

3. The skills of Managing Crises include:

- Developing a Crisis Plan—Briefly describe how a Personal Assistant would develop a crisis plan with a person they are working with:

Training Pretest/Posttest

- Assessing Critical Situations—What are some examples of critical situations a Personal Assistant may need to assess?

- Implementing an Emergency Response—As well as the actions laid out in a person’s crisis plan, what else influences how a Personal Assistant responds during an emergency?

4. When does a Personal Assistant begin to manage crises?

Notes