

# Group Process Guidelines *for* Leading Groups and Classes

LeRoy Spaniol, Sue McNamara, Cheryl Gagne, and Rick Forbess

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Published by:

Center for Psychiatric Rehabilitation  
College of Health and Rehabilitation Sciences (Sargent College)  
Boston University  
940 Commonwealth Avenue West  
Boston, MA 02215  
<http://www.bu.edu/cpr/>

The Center for Psychiatric Rehabilitation is partially funded by the National Institute on Disability and Rehabilitation Research and the Center for Mental Health Services, Substance Abuse and Mental Health Services Administration.

All proceeds from the sale of this book are used to further the work of the Center for Psychiatric Rehabilitation. No royalties are paid to the authors.

ISBN: 978-1-878512-43-7

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# Preface

A wide variety of classes and groups are used in mental health and self-help settings. Many classes and groups are knowledge-based or skill-based, involving teaching information about content areas, such as coping and stress management. Some examples of groups that are knowledge-based or skills-based include psychoeducation groups, skills teaching groups, and recovery-oriented groups, some of which are based on *The Recovery Workbook* (Spaniol, Koehler & Hutchinson, 1994, 2009) or the *Wellness Recovery Action Plan (WRAP)* (Copeland, 2000). Other groups provide enrichment activities, such as wellness skills, peer support and counseling, and discussion groups.

While some leaders are skilled in teaching or in group process, many group leaders lack sufficient training and experience in facilitating groups and classes effectively. Many group leaders are new to the process of leading groups; and many group leaders were never formally trained in the skills of conducting a group, but rather they learned how to run a group on-the-job by observing a co-worker or a supervisor. This book provides some guidelines for teachers and leaders of groups that are knowledge-based or skills-based, but they are not designed for facilitating a support or therapy group.

Regardless of the type of group being led, all groups require the leaders to perform skills *before* the group in preparation for the group or class, *during* the group while conducting the group or teaching the class, and *after* the group for following-up the group or class activities. This book is organized into sections that outline these preparation, delivery, and follow-up skills. Information is included that explains this series of group process skills as well as some examples and exercises to practice the skills. Throughout the book you will be asked to think of a group or class that you currently lead or are planning to lead in the future. Be specific about identifying a particular group or class that will be the focus for your practice exercises throughout this workbook. At the end of each chapter is a checklist that may be used by individual group leaders as a self-assessment tool to assess their own group process skills, and it may be used by supervisors as an evaluation tool.

This group process book is designed for several purposes of use. Individual practitioners and peer leaders may use the workbook on their own to improve their skills in leading groups and classes. Individuals who are new to leading groups may read through the guidelines and practice exercises as a way to teach themselves the skills in facilitating a group or class. In addition, experienced group leaders may want a refresher of some of the guidelines of group process. This workbook also is designed as a teaching tool for program directors and supervisors to use in training staff how to facilitate a group in their agencies as well as for instructors to use in academic settings when teaching the concepts of group process.

As more and more peer specialists and consumer-providers are leading and co-leading groups and classes, there is a separate chapter included in this book specifically for promoting peer leadership. While the general group process guidelines are the same for anyone leading a group or class, the chapter on promoting peer leadership discusses some of the unique and valuable contributions that peers can add to a group or class, such as self-disclosing experiences and how to incorporate those relevant experiences into the group or class content. Peers provide a very important role in leading and co-leading groups and classes because peers can engage and

relate to the other group members in an exceptional way that is helpful and inspirational to others.

Many of the suggestions and tips included in these group process guidelines were derived from our Center's *Psychiatric Rehabilitation Training Technology* (Cohen, Danley, & Nemec, 1985, 2007; Cohen, Farkas, & Cohen, 1986, 2007; Cohen, Farkas, Cohen, & Unger, 1991, 2007; Cohen, Nemec, & Farkas, 2000), *Case Management Training Technology* (Cohen, Nemec, Farkas, Forbess, & Cohen, 1988), the *Leader's Guide—The Recovery Workbook: Practical Coping and Empowerment Strategies for People with Psychiatric Disabilities* (1994); as well as years of experience from the authors' work in leading groups and classes.

We would like to acknowledge and thank all of the people we have worked with in groups and classes as well as our own teachers and mentors over the years. Our students and group participants have provided us with inspiration, and our mentors have been our role models and have provided us guidance about what works well with group process. We also would like to acknowledge and thank Bill Anthony, our group leader and mentor, for his encouragement to develop this book; Kathy Furlong-Norman for her endorsement of this publication; and Linda Getgen for her continuous support and for her creativity in designing and publishing this book.

Best wishes as you learn about the group process guidelines and the skills of becoming an effective group leader.

# Chapter 1: Planning for the Group Activity

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|------------|---|
| 1.1        | Identifying the Group Structure and Roles |
| 1.2        | Identifying the Group Participants        |
| 1.3        | Identifying the Group Objectives          |
| 1.4        | Organizing the Activity Materials         |
| 1.5        | Preparing Yourself                        |
| 1.6        | Arranging the Environment                 |
| Checklist: | Planning for the Group Activity           |

# Chapter 1: Planning for the Group Activity

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*Planning for the group activity* is done *before* the group activity is held. Planning for the group or class ahead of time is extremely important and can be one of the best things a leader can do to be well organized and ready for the group. Planning for the group activity prepares you as the leader to conduct the group with consideration and forethought. Once you are well prepared and organized, then you will be freed up to pay full attention to the participants *during* the group activity. Planning for the group activity involves a series of preparation skills:

- 1.1 Identifying the Group Structure and Roles
- 1.2 Identifying the Group Participants
- 1.3 Identifying the Group Objectives
- 1.4 Organizing the Activity Materials
- 1.5 Preparing Yourself
- 1.6 Arranging the Environment

Each one of these preparation skills will be discussed with explanations and suggestions along with examples and practices sprinkled throughout this chapter.

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## 1.1 Identifying the Group Structure and Roles

*Identifying the group structure and roles* is setting up the organization of the group and the roles of the group members when preparing for the group. It gets you started in thinking seriously about the group composition and how it will be run. Here are some tips you can use when identifying the group structure and roles:

- **Frame the group experience as educational.** Group leaders should communicate clearly to participants that they will be involved in an educational experience and that they will be students in this group. Although many people with psychiatric disabilities have been involved in different therapeutic groups, the role of being a student can be an important and healthy aspect of a person's developing sense of self. It shifts the focus away from other identities that can be stigmatizing and debilitating for many people, such as patient or client.
- **Clarify the role of the student when preparing for the class or group.** Identify whether this is a new role for participants at your agency or one that is familiar to them. Think about what kinds of expectations you have in mind for the students for your particular class. For example:
  - Is this a class where you want students to actively participate in discussions?
  - Will students be expected to take notes?
  - Will students have some type of homework assignments?



For your next class or group activity, list the expectations for the students:

*Group Participant's Role*

*Participation Expectations*

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- **Record** the name of the activity, the purpose of the activity, and any expectations of the participants on a chalkboard or flipchart sheet and posting the sheet on the activity room wall before each session.
- **Collaborate with others during the teaching or group process**, such as staff or program administrators. Such collaboration often is required by the setting of the teaching. Depending on the setting where teaching occurs, educational group leaders may be required to share information about group discussions or group members with others, such as a group member's primary clinician. Collaborating with mental health agency staff and administrators is an important role for the group leader, who will need to clarify in advance what sorts of coordination and information sharing will be required.

For your next group activity, who might you need to collaborate with and why?

*Name of Person*

*Their Role*

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- **Address confidentiality issues** because of this potential need to share information with others and to provide a safe teaching environment. It is useful to identify in advance specifically what type of information will be shared and with whom. When the leader explains and values the need for collaboration with other key people, group members are more likely to agree to sharing information with the staff.

What type of information might you need to share with others for your next group?

| <i>Name of Person</i> | <i>Type of Information to Share</i> |
|-----------------------|-------------------------------------|
| _____                 | _____                               |
| _____                 | _____                               |
| _____                 | _____                               |
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- **Discuss rules about confidentiality among the group members.** Confidentiality acknowledges the students' natural need to discuss their experiences in the class, but prevents revealing the names of those participating or identifying personal information shared by class participants.

What are your agency's policies about confidentiality?

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- Clarify the roles of the leaders.** Sometimes there is more than one leader in the group or class. This can be very helpful in sharing teaching duties and in supporting one another. It is important that one leader has the major responsibility at any given time. As a co-teacher, it is helpful to meet before the class and to identify ahead of time when one teacher will be the primary leader for each class session. The teacher, who is not the primary leader at a particular time, can observe the class and the ongoing group process. Make it clear when primary leader roles are changing because it may not be obvious to the students.

Do you typically co-lead groups?  Yes  No

What has happened when you have facilitated a group with another leader?

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For programs that use *The Recovery Workbook* (Spaniol, Koehler, & Hutchinson, 1994, 2009), it is suggested that groups should be co-led by a professional and a consumer. This balance of perspectives and experiences helps the facilitation of the recovery group. The leaders support each other and provide feedback to each other during planning meetings and supervision meetings.

Similarly, many family education and family support groups are co-led by a staff person and a family member. Each leader contributes valuable information and experiences to these groups.

Some teachers may be mental health professionals, who also are family members or mental health consumers. The role the teacher takes in these instances would depend on the nature of the learning experience. For example, if the class is taught ordinarily by peers, then the teacher should stay in the role of a peer and not in the role of a professional. This can be accomplished by sticking with the curriculum and commenting from one’s own personal experience rather than from one’s professional experience. Staying with your own personal experience will connect you to the students as a peer rather than as the “expert.” It also will help to build students’ confidence in recognizing their own expertise and in coming up with their own solutions.

What experiences have you had co-leading groups with family members and/or mental health consumers?

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If you are a peer leader, how do you distinguish between your personal role and your professional role?

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- **Identify boundaries in the group.** An initial agreement helps establish boundaries in the class. The agreements made at the start of the classes are primarily a commitment people make to themselves. They have chosen to take the class because they hope it will meet their needs. It is an opportunity for them to begin, continue, and successfully complete something for themselves. When someone joins the class, they also are making a commitment to the other students and to the teacher. It can be useful to articulate the terms of the agreement. Such an agreement may cover the following points:
  - Agree to be present each week, to be on time, and to remain throughout the entire class.
  - Agree to work actively on the information, skill, and support needs that brought me to the class.
  - Agree to put my feelings into words, not into actions.
  - Agree to continue participation until the final class.
  - Agree to protect the names, identities, and personal information of my fellow group members when discussing what has happened in the class.
  - Agree to limit comments in class to two minutes.

What additional items might you add to your agreement for your next group or class?

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- **Address consequences when someone doesn't meet the expectations of the group or class or doesn't meet the demands of the role as a group member.** How will you decide if someone is no longer considered a member of the group? It usually is best to air on the side of leniency and allowing people to stay in the group, unless there is a formal exit process.

How do you address is the issue of unmet expectations at your agency or program?

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- Finally, be sure to **inform participants and any relevant others in advance about the group meeting time and place.** It is best to put the meeting time and place in writing, such as an e-mail notice or posted on a bulletin board in a common area.