

8-Step Small Group Planning & Problem Solving Observation Guide (Revised)

Small Group: _____

Date: _____

Observer: _____

Overall Process Observations *(Respond to these items after completion of a session)*

Collaborative relationship – to what extent:

- Was the process collaborative?
- Were all participants actively involved throughout the process?
- Was a trusting/open climate established and maintained?
- Did the discussions remain non-judgmental, with new and different ideas encouraged?
- Was consensus facilitated and maintained?
- Were decision-making rules discussed and agreed upon?
- Were participant roles and responsibilities for problem solving understood?

Comment on the effectiveness and impact of each of the following skills:

- Active Listening-
- Summarizing-
- Questioning-
- Paraphrasing-
- Delivering-
- Integrating-
- Empathizing-

Other Process Elements:

- Were time limits described in advanced and observed?
- Were responses portrayed on public display?
- Did the facilitator summarize the meeting and review action plans?
- Was time provided for group reflection on the process?
- Was a follow-up meeting (date/time) scheduled (if necessary)?

Problem Solving Steps <i>4-Step and 8-Step</i>	Critical Feature Response <i>Observe each step in the process and document your observations using the prompts below. Be concrete, detailed, and behaviorally descriptive.</i>	Facilitation Skills <i>Tally the # of times each was used, verbalizations can be counted more than once; categories are not exclusive</i>
Step 1 Problem ID Step 1 – Define priority, set goal and determine how the goal will be measured	<p>Was the problem sufficiently clarified and understood by all? Why or Why not?</p> <p>Did the group reach consensus regarding the problem and goal identified?</p> <p>Was a method of measuring the outcome identified (if data doesn't exist was a plan developed to obtain these data)?</p> <p>Was the problem and goal described in concrete, descriptive, behavioral terms?</p>	# Active Listening # Summarizations Questions # Information Gathering # Clarifying # Open # Closed # Paraphrasing # Delivering Info & Ideas # Integrating Information # Empathizing
Step 2 Problem Analysis Step 2 – Identify barriers and resources Step 3 – Prioritize barriers	<p>Were brainstorming procedures explained (free-flow technique, round-robin technique, pass-option, etc.)?</p> <p>Was sufficient effort invested into identifying resources/barriers? If not, what could have been done differently?</p> <p>Was guidance provided for barrier selection (i.e., select an important barrier but not necessarily the biggest one, choose something with a likelihood of success, other barriers can be selected at a later time, often reduction of one barrier reduces others)?</p> <p>Was one barrier identified and defined?</p> <p>Was a link established between the reduction in the obstacle and the overall goal (established in Step 1)?</p>	# Active Listening # Summarizations Questions # Information Gathering # Clarifying # Open # Closed # Paraphrasing # Delivering Info & Ideas # Integrating Information # Empathizing

<p>Step 3 Plan Development</p>	<p>Step 4 – Identify strategies to reduce prioritized barrier(s) Step 5 – Develop specific action plans Step 6 – Develop follow-up plan for each action plan</p>	<p>Were alternative strategies for overcoming barrier identified?</p> <p>Was guidance provided for selecting a strategy (not limited to ideas on the resource list, selection of something manageable with high likelihood reducing other barriers, etc)?</p> <p>Was one or more specific strategies selected?</p> <p>Were specific plans for implementing strategies developed in detail? (who, what, when)</p> <p>Were timelines realistic?</p> <p>Was a support person identified for each task?</p> <p>Were responsibilities for implementation clear to all participants?</p> <p>Was a plan for following up with persons responsible for action plans established for each strategy?</p>	<p>___ # Active Listening ___ # Summarizations</p> <p>Questions</p> <p>___ # Information Gathering ___ # Clarifying ___ # Open ___ # Closed</p> <p>___ # Paraphrasing ___ # Delivering Info & Ideas ___ # Integrating Information ___ # Empathizing</p>
<p>Step 4 Response to Intervention</p>	<p>Step 7 – Evaluate if barrier was reduced Step 8 – Evaluate if goal was achieved</p>	<p>Was a plan for evaluating each selected strategy developed in Step 5 carried out (who collects and analyzes <i>what</i> by <i>when</i>)?</p> <p>Were identified data/criteria for implementation and outcomes reviewed?</p> <p>Were decisions made based upon the data/criteria reviewed? (<i>follow-up meetings only</i>)</p> <p>Were identified data/criteria for progress toward overall priority goal developed in Step 1 reviewed (who collects and analyzes <i>what</i> by <i>when</i>)?</p> <p>Were decisions made based upon the data/criteria reviewed? (<i>follow-up meetings only</i>)</p>	<p>___ # Active Listening ___ # Summarizations</p> <p>Questions</p> <p>___ # Information Gathering ___ # Clarifying ___ # Open ___ # Closed</p> <p>___ # Paraphrasing ___ # Delivering Info & Ideas ___ # Integrating Information ___ # Empathizing</p>