<table>
<thead>
<tr>
<th>Topic Area(s)</th>
<th>Confrontation</th>
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<tbody>
<tr>
<td>Title</td>
<td>Observational Skills &amp; Confrontation</td>
</tr>
<tr>
<td>Last Revised</td>
<td>3/9/07</td>
</tr>
<tr>
<td>Time Required</td>
<td>1 hr 15 min without role play or 1 hr 30 min with role play</td>
</tr>
<tr>
<td>Purpose</td>
<td>To teach observation versus interpretation as a supplement to Chapter 10. To review Chapter 10 and do the activities.</td>
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<tr>
<td>Audience:</td>
<td>Partners, staff</td>
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<tr>
<td>Method:</td>
<td>Demonstration, Small group activity, large group report out, Role Play</td>
</tr>
<tr>
<td>Materials</td>
<td>Copies of Handouts Observational Statements and Follow-up Questions Manuals brought by participants or copies of Chapter 10. Diagrams drawn on chart packs of Dr. Fords and the Karpman Triangle/healthy boundary model.</td>
</tr>
<tr>
<td>Pre-Class Preparation:</td>
<td>Post the diagrams of the case manager models including Dr Ford’s and the Karpman Triangle/healthy boundaries model at the front of the room for reference during the role play. Find a volunteer before class for the demonstration and also for the role play. Post a chart pack paper with the title “Parking Lot” for items that may not be on the specified topic but may be ideas for later examples, points of discussion, etc. Post a copy of the Case manager models for reference during the activity.</td>
</tr>
<tr>
<td>Special Considerations</td>
<td>This guide works well for the first part of Chapter 10, Confrontation.</td>
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<tr>
<td>References or Resources</td>
<td>Chapter 10. Handout at end of packet summarizing Ch 10 Observational Statements and Follow-up Questions. Handout at end of packet on Observation/Interpretation to be used as follow-up handout to demonstration (Do not pass out until after the demonstration) Practice Session Guide on Case Manager Role/Karpman Triangle Tips for Role Plays handout</td>
</tr>
<tr>
<td>Contact(s)</td>
<td>Pam Prichard, Training, (503) 947-5159</td>
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Part I Chapter 10 & Observational Skills
(Approximately 1 hr 30 minutes)

Intro to Ch 10 (Transition from prior chapters/sessions): (5 min)

They have been working on developing skills in validating feelings (empathy) and asking open ended questions.
Can ask: How many are feeling confident/comfortable with these skills?
We plan on building on what they have learned so far with additional skills needed for successful positive confrontation or feedback.

Review Intro in Book, Page 143:

Emphasize that Dr. Ford’s use of the term “confrontation” refers to useful and positive confrontation…not an attack.

This type of confrontation is for confronting nonproductive behaviors and behaviors that are blocking self-sufficiency.

Can ask group: Why is it important that these be addressed? What will be the effect on their action plan if not addressed?
(Their action plan may be leaving out crucial elements. The likelihood of success will be less… It will help in the preparation and implementation of a successful plan)

Read the three uses of confrontation in the darkened box and the associated examples.

The first has to do with what we notice they may be avoiding.

The second has to do with addressing non-productive behaviors.

The third is bringing up the topic of how they contribute to situations that aren’t working or conflicts. (In looking at relationships, it is not 100% one persons problem and 0% another’s problem. How do we each contribute to the situation?)
Brainstorming Topics for Confrontation (5 min)

**Intro:** We’d like to know what the most challenging or common things they have to confront with clients. What topics are most relevant to the work they do? We will use these in a later activity when we practice some of these skills.

**Instructions to small groups:** Come up with two or three examples of the most common or challenging things you need to confront with clients. Write one each on ½ sheet stickies with a large marker and put on the white board. They can group theirs with others that are similar or put separately.

Facilitator sorts out and groups if they have not already.

Supplemental Material to Chapter 10
Demonstration and Discussion (15 min)

**Note to trainer regarding transition to observation versus interpretation topic:** Because the next activity relies on the element of surprise, make the transition to this topic after doing the demonstration/discussion. Do not say it is an observation versus interpretation demo or you will give the discovery part of the activity away.

Say something like: We’re going on to another foundational skill related to effective confrontation. We’ll start with an experiential activity. It will be a very short. Afterwards, I’ll ask you “What did you see?”

**Demonstration:**
Find a participant ahead of time willing to participate in a role play. Role play consists of you planning and the volunteer working on something at her desk (writing), and you waling hurriedly up to her, saying loudly “Where is the report you said you’d have for me?” and slapping your hand on the counter. (Ask the worker to look up as if startled but say nothing).
Then ask the group what they saw…expect rude, disrespectful, etc. Keep asking, “What else did you see?” until responses are exhausted and writing them on a chart pack. Title the chart pack sheet “What did you see?”

Then go back and ask group to identify which of their comments is interpretation and which is observations. Write O (observation) or I (interpretation) next to each.

Ask: **Why is the topic of observation and interpretation key to confrontation? What happens when we use interpretive language? Can give an example if you were to be given feedback with the interpretive words, what would be the reaction? How effective would it be?**

(Defensiveness/ not heard/ ineffective communication.)

Note our first reaction is interpretation. This is where practice and planning help to remove the judgment and interpretation.

Can they remember a time someone communicated with them who had made judgments and assumptions? How did it feel?

Note, some people defend the interpretive language saying that is what’s true for them in their perspective. Regardless, will it be effective and have the result we want?

**Follow-up Handout: Observation versus Interpretation**
Pass out follow up handout. Note that it has example of both observation and interpretation and is a good reference for the demonstration and discussion we’ve just had.

**Handout: Observational Statements and Follow-up Questions (5 min)**
Pass out handout which is copied at the end of this guide. Dr. Ford presents many examples in this chapter of a simple feedback model of a generalized or personalized observational statement and a follow-up question.

Give an example. A generalized observational statement is “in general” and not personal, e.g., “Sometimes looking for a job after being out of the
workforce can seem very overwhelming.” Versus a personalized statement, “It may be that you are feeling overwhelmed with all the effort and steps involved in looking for work.”

The follow-up questions allow us to check out our guess: “Could that be true?” “Is it possible this is going on for you?” etc.

**Review Workbook (7-8 min)**

Pages 144 & 145

As we go through the guidelines for positive confrontation, notice examples of this use of observational statements and follow-up questions.

Mention the topic of each guideline and read the example.

1. **Within the context of the relationship.**
   Dr. Ford notes that our confrontation will only be successful if we have a basis of rapport. Can ask class: Does anyone know what research shows in regards to how many positive interactions are needed in a relationship to support a challenging interaction? (This is true in family relationships, work relationships, etc.) 4-8
   How many of them can think of a situation where they have received constructive feedback from someone with no other interactions preceding? How does it feel?

2. **Judge the person’s readiness.**
   Note the example has to do with timing of feedback. Persons who have the personality of introversion need time to think before responding, may want to wait until the next day, etc. Note, readiness could also refer to whether this is the right time to share.

   Also readiness may relate to the amount of confrontation or feedback. You can ask: “How many pieces of feedback can you hear and incorporate at once? (Most people will say 1, others 2 or 3)

3. **Directly related to self sufficiency**
   This is the bigger picture that Dr. Ford mentioned in the introduction—the context is in terms of the person’s goals and self-sufficiency. This is a similar concept that they may be aware of as staff...when they get
feedback at work, it’s most effective when it’s related to getting the work done successful or effectively.

4. Behavior
This has to do with what we saw earlier, specific observations versus interpretations and judgments.

5. Done a little bit at a time
Is changing habits and learning new skills a one time event or a process? We need to keep this in mind and look at next steps.

Page 145 & 146
Mention topics only of “What Should You Confront.” We’ll use these examples later.

Mention the more expanded model on page 146 & 147 for confronting more sensitive issues such as hygiene. We practice this in the next session.

Mention “How Participants Can Respond” on page 147 & 148. This section illustrates how participants may not accept the confrontation or take the conversation down a different track and how the case manager can respond. We’ll also practice this in the next session.

Confrontation Exercise 1, pg 150-152

Do Question #1 as a large group as an example. (7 minutes) Read the first question on page 150 of Making Case Management Work.

Go through the possible responses and if not the best choice, ask why as well as identify the best choice. Ask the group to tell you why not on the other items (interpreting and judgmental, only empathizing and not confronting, attacking-taking the perpetrator role, taking the authority role, etc. Refer to pitfalls (helper, abandoner) in Dr. Fords CM model as well as Karpman Triangle (rescuer, perpetrator, victim).

For example:

A. Caseworker is taking responsibility for the problem, giving the answer, taking on a role of a rescuer or authority
B. Similar to A

C. Caseworker is highly interpretive and judgmental. Taking on the perpetrator role

D. Best choice

**Coming up with an Alternate Response in Their Own Words:**
Now work with the group to come up with an alternate response using the lead-in phrases that Dr. Ford provides that is observational with a follow-up question. Let the class know we want to practice these lead-in phrases. Although they may not initially come naturally, they are a tool set we want to become familiar with. Ask the group, “What is the purpose of these lead-in phrases? How would the communication be different without them?” (They are gentler, more cautious, less likely to offend, may be seen as more respectful, etc.)

Provide the group with the following example of an alternate response for A that was developed from a prior class:

“You say that others pick on you and don’t like you. Could it be that there is something that you are doing that they are reacting to?

Here’s another example for A from a prior class:
“You’ve said you are often late to meetings at work because you are working so hard. Could we talk about how your lateness might be affecting the rest of the team?”

**Small Group Work: (8 minutes)**
Assign each small group two of the remaining questions from pages 150-152 so there is overlap.

Write on a chart pack paper

1. Why not the others.
2. Your observation/question in your own words.

**Large group Debrief (10-15min)**
Option for Prior Activity:
- For small group work, go through each question. As a large group pick out the preferred response and the things they don’t like about the others. Then have each group write an observation and follow-up question in their own words for the situation on one or more ½ sheet stickies and post. Now compare the responses and have the group discuss. If they think one is stronger or better, why? Then move on to the next question and so on.

Activity on Page 153: (15-20 min)
Give each group one or more questions. If having overlap questions, have both groups report out on it so you can see what different thinking ideas the groups had. Prompt the group who did the question for each piece listed in the instructions, e.g., “So what didn’t you like about A?” “Did you have a statement for a further level of confrontation if the first didn’t work?”

After both groups have shared what they came up with, ask if anyone else in the larger group has any further ideas they want to share.

If as a facilitator you are uncertain about some of the responses given, ask the rest of the group what they think and allow the group to give feedback to each other.

As the facilitator, also feel free to add some of you own ideas and insights after the group has finished sharing theirs.

Role Play: (15 minutes or longer- Can also be done or continued at later session(s)) Do role plays with some of the situations that the class brainstormed earlier in which they need to confront clients. Find a volunteer in advance to start the process with you and allow the entire group to participate with ideas.

Note: Once the skills of observation and confrontation are reviewed, ongoing role plays on this topic may be beneficial as these skills are some of the more complex and can take repeated practice to learn to apply. Previously learned skills such as listening for feelings, summarizing, etc., can also tie in to these role plays.
Observational Statements and Follow-up Questions
Making Case Management Work -- Chapter 10

Observational Statement

Generalized Observational Statement

Sometimes…
It seems to me…
It can be….

OR

Personalized Observational Statement

Maybe when you…
This morning, you…
It may be that when you…
It seems that you have a difficult time with..

Follow up Question

Is it possible that….?
Could it be that….?
Perhaps you feel…?
How would you feel about…?
Have you considered…?
Perhaps there’s some truth to…?
I wonder if we can talk about what you may be doing that …
Observation Versus Interpretation

Observational statements are what you hear and see and are objective and specific.

Interpretation: You were angry with me.
Observation: You spoke to me in a louder tone of voice than usual.

Observational statements are not subjective, i.e., they do not lend themselves to multiple interpretations.

Interpretation: You were in my space.
Observation: You were within a foot of me.

Interpretation: You stormed in.
Observation: You walked in more quickly than usual.

Observational statements are not judgmental or opinionated

Interpretation: You accused me of not having the report done.
Observation: You said, “Where is the report?”

Observational statements do not make assumptions.

Interpretation: You tried to intimidate me.
Observation: You slapped your hand on the table.

Observational statements do not include words with connotations or hidden meaning.

Interpretation: You stomped in.
Observation: You walked in more quickly than usual.