Spotlight: A Skills Recognition Tool

User Guide

4. Managing Performance and Careers

ACKNOWLEDGEMENT

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THE SPOTLIGHT DEVELOPMENT FRAMEWORK

Managing performance by developing process skills

This User Guide is designed for use in conjunction with any existing approach to performance management.

The focus is on ways of identifying and developing skills that will enhance individual and team performance by managing aspects of performance and learning that are hard to see, but crucial to the development of quality, efficient and innovative performance at individual, team and organisational level.

The User Guide contains several simple and practical add-on tools, designed to help build key social and organisational process skills.

These under-specified skills, located in the grey area of Figure 4.1, are developed through work-based experience.

The Spotlight approach is designed to help build these skills, by a structured process in which jobholders move through increasing levels of workplace participation, contributing to quality, efficiency and innovation.

Figure 4.1: Process skills to be identified and developed
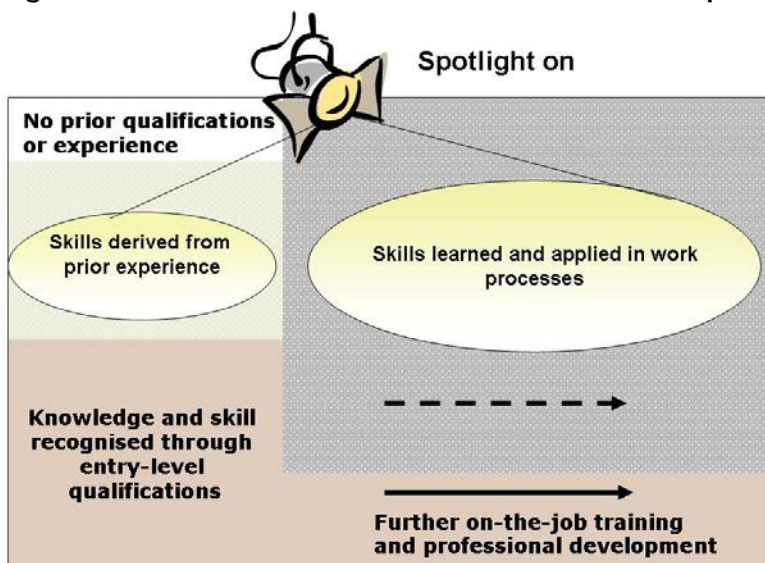
Spotlight skill sets and elements as sources of quality and efficiency

The Spotlight skills are 'how to' skills. They are the work process skills that turn knowledge inputs into outcomes through reflective and collaborative activity.

The Spotlight skills enable activities that link tasks into ongoing work processes and workflows.

They are:
- the social skills of shaping awareness, interacting and relating – important sources of service quality
- the organisational skills of coordinating – important contributors to organisational efficiency.

Table 4.1: The Spotlight skill sets and elements

A. Shaping awareness – capacity to develop, focus and shape your own and other participants' awareness by:

A1. Sensing contexts or situations

A2. Monitoring and guiding reactions

A3. Judging impacts

B. Interacting and relating – capacity to negotiate interpersonal, organisational and intercultural relationships by:

B1. Negotiating boundaries

B2. Communicating verbally and non-verbally

B3. Connecting across cultures

C. Coordinating – capacity to organise your own work, link it into to the overall workflow and deal with disruptions by:

C1. Sequencing and combining activities

C2. Interweaving your activities with others'

C3. Maintaining and/or restoring workflow

Using Spotlight skill levels as sources of innovation

The Spotlight framework provides information on the pivotal processes by which people develop and apply growing levels of skill in a job.

The Spotlight learning levels are based on the development of proficient performance.

Innovation and work processes are improved through problem-solving, solution-sharing and the embedding of solutions into systems (Table 4.2).

Table 4.2: The Spotlight skill levels

1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
Capacity to:				
Build experience through practice, reflection and learning from others	Apply experience independently and automatically	Use automatic proficiency while solving new problems	Help create new approaches through shared solutions	Embed expertise in an ongoing work system

High performance organisations are those that focus on innovation. By shining a spotlight on the hidden process skills of service sector jobs, it is possible to:

- foster the learning and exchange of new context-specific approaches and hence of innovation
- stage the difficulty of work assignments, generating employee self-efficacy
- foster process improvement, based on continuous learning
- develop individuals' capacity to move into new roles within the organisation (career pathing), thereby contributing to the retention of innovative capacity.

Two ways of representing the Spotlight skills development framework

By putting together the Spotlight skill elements (organised into sets) and levels, we obtain a grid (Figure 4.2). It is possible to map the location of an individual or team on this grid, in

terms of skills used and skill levels attained. By comparing learning levels at different points in time, it is possible to map individual or team development.

Figure 4.2. Spotlight proficiency grid

SKILL ELEMENTS	LEVELS				
	1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
A. Shaping awareness					
A1. Sensing contexts or situations					
A2. Monitoring and guiding reactions					
A3. Judging impacts					
B. Interacting and relating					
B1. Negotiating boundaries					
B2. Communicating verbally and non-verbally					
B3. Connecting across cultures					
C. Coordinating					
C1. Sequencing and combining activities					
C2. Interweaving your activities with others'					
C3. Maintaining and/or restoring workflow					

Exactly the same information can be expressed through a radial diagram (Figure 4.3), where the five grid lines represent the five learning levels identified in the grid (see Stretch Goal Profile).

Figure 4.3: Spotlight development lens
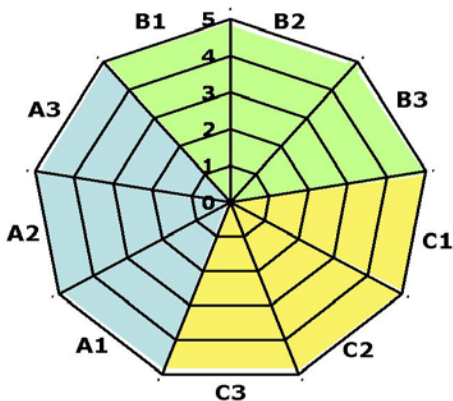
Linking individual, team and organisational performance

This Spotlight tool is designed to help enhance organisational performance through an integrated approach to the management of performance feedback, individual and group learning, and career pathing.

Adaptable to the varying needs of organisations, the approach is not prescriptive and can be built into existing practice. It is simply a systematising and acceleration of the existing informal processes by which jobholders gain expertise through problem-solving and solution-sharing.

The Spotlight approach is flexible, allowing goals to be reviewed incrementally, and creates an identifiable link between individual and organisational performance, because at the higher Spotlight learning levels, process knowledge is being embedded in roles, tools, procedures, systems.

This User Guide contains guidance on using two main Spotlight performance management tools:
- An individual or team skills audit that can be used to identify jobholders' experience in carrying out activities using the Spotlight skills.
- A method for setting and supporting the attainment of stretch goals, using audit outcomes.

Practical value added to individual and team performance management

By helping identify and develop the skills used by experienced jobholders, the Spotlight framework focuses performance appraisal on concrete problem-solving and skill-building.

The Spotlight framework turns personal attribute statements (such as empathetic, outgoing personality, flexible, well-organised and so on) into skill elements and learning levels (see User Guide 3, Table 3.3 Translating personal attributes into Spotlight skills).

By using the Spotlight skill descriptors, managers, supervisors and team leaders can take the heat out of individual and team feedback discussions, turning them into the constructive negotiation of learning opportunities.

As the Spotlight hidden skills are derived from social learning processes, the Spotlight tools provide a safe framework for team feedback. Social and organisational skills are located in the emotionally neutral domain of skilled techniques, listed in a taxonomy.

Where extrinsic incentive schemes are subject to escalating costs and diminishing returns, a structured approach to the building of self and team efficacy may be a welcome supplement or alternative to performance-related pay.

The Spotlight framework can be used within any existing appraisal system, for example, Spotlight's awareness-shaping skills include assessment of the impacts of one's behaviour. It is less threatening to individuals if evaluation is turned into impact assessment and treated as a skill that can be built in stages.

Similarly, improving the interpersonal and time management aspects of work is treated not in terms of the need to address personal failings, but as the systematic development of skill elements.

The Spotlight tools provide a diagnostic approach to feedback, based on immediate problem-solving. If a pattern of need emerges from individual developmental interviews, team leaders and managers may look to team-based problem-solving as a solution.

For work teams, the Spotlight framework provides a structure for formalising group problem-solving, within normal team briefings.

The Spotlight framework also provides a terminology for collaborative reflection. Again, in a team context, the Spotlight vocabulary of invisible skills allows the neutral discussion of sensitive issues.

SKILLS AUDIT

A key Spotlight performance management tool is the Skills Audit, which consists of a self-completion checklist of specific work activities. It covers the less recognised skills that have been learned in the workplace and through prior experience and are applied in the job.

Jobholders are asked to go through the workbook in advance and then to work with a team leader, mentor or facilitator to complete it.

The booklet contains concrete examples of activities, pre-classified, through research, according to the Spotlight skills on which they draw. This method of skill identification is used because the skills themselves are abstract, and activity examples help identify them through context–specific applications.

Jobholders are asked to tick activities that they undertake in their present work, or in past work, paid or unpaid. Jobholders are also asked to identify examples of activities where they would like to develop their ability to use the skills involved.

Jobholders are asked to nominate further activities that they carry out, using a skill element. Managers will be able to classify these additional activities by level, based on the degree of familiarisation, fluency, problem-solving, solution-sharing or system-changing involved.

The skills information thus collected is then turned into a personal skills profile. This is done in a meeting between jobholder and team leader or supervisor. The Skills Audit contains step-by-step advice for using this personal skills profiling tool.

For each individual, the outcome of the exercise is:
- a personal profile of Spotlight skill elements indicating areas of relative skill concentration and any gaps
- a list of activities showcasing key skills used, drawn from the workbook or added to it
- a list of activities, linked to specific skills, in which the jobholder seeks learning opportunities.

This document can then be analysed further by the team leader or manager and be discussed in a follow-up meeting.

Team skills

If required, the process can be adapted to a team workshop, in which individuals are first guided through self-completion of the Skills Audit.

The team discussion would identify complementary strengths and discuss strategies for coaching through the sharing of experience within the team.

Profiling individual or team skills

At the end of the Skills Audit, a method is demonstrated for using the information collected in order to build a personal Job Skills Profile. This can be done by an individual or team.

This Job Skills Profile is a simple bar chart, showing clearly the level of proficiency attained in using various Spotlight skills – for example, whether the jobholder is solving problems in the course of day-to-day work (level 3), working at the level of collaboratively creating new solutions through shared problem-solving (level 4), or contributing to work systems (level 5).

When jobholders have followed instructions for tallying their responses to the workbook questions, the profile will look something like Figure 4.4 below. A similar profile could be used to map team skills.

Figure 4.4: Example of a completed Spotlight Job Skills Profile

Name	E May				
Organisation	Comserv				
Position title	Administrative Officer				
Date	29.7.08				
	LEVELS				
SKILL ELEMENTS	**1. Familiarisation**	**2. Automatic fluency**	**3. Proficient problem-solving**	**4. Creative solution-sharing**	**5. Expert system-shaping**
A. Shaping awareness					
A1. Sensing contexts or situations	✓✓✓	✓✓✓	✓✓		
A2. Monitoring and guiding reactions	✓✓✓	✓✓			
A3. Judging impacts	✓✓✓	✓✓✓			
B. Interacting and relating					
B1. Negotiating boundaries	✓✓✓	✓	✓✓		
B2. Communicating verbally and non-verbally	✓✓✓	✓✓			
B3. Connecting across cultures	✓✓				
C. Coordinating					
C1. Sequencing and combining activities	✓✓✓	✓✓✓	✓✓✓		
C2. Interweaving your activities with others'	✓✓	✓✓			
C3. Maintaining and/or restoring workflow	✓				

Examples of activities using key skill elements

B1.   Find a pleasant way of saying 'not now' to requests that would prevent deadlines from being met.

C1.   As new demands arise during the day, frequently reprioritise tasks, planning activities to streamline your movements and keep within deadlines.

Further examples provided by jobholder

A1.   Use awareness of the difference between Gen-Y and older workers' approaches to technology

Of course, if a jobholder is learning constantly in the job, the profile will change over time. Structured professional development, mentoring relationships, cross-disciplinary team

meetings and other forms of workplace learning are ways of focusing and accelerating this learning.

Changing the items in the Skills Audit

The activities listed in the Skills Audit are drawn from a longer list of pre-classified work activities (see User Guide 2). You may wish to substitute or add further examples from this longer list:

- to ensure that the examples are most relevant to the workplace or the jobholder
- to prevent undue repetition when the workbook is reused with the same jobholder over time.

Using the examples of further activities nominated by jobholders

It is important for the manager to collect these examples and classify them by level (familiarisation, fluency, problem-solving, solution-sharing or system-changing). These further examples can be added to the list of activity examples (see User Guide 2). Doing so will provide a resource for updating the Skills Audit. This will ensure that it is customised to the workplace and remains fresh and relevant from year to year.

NEGOTIATING STRETCH GOALS AND LEARNING OPPORTUNITIES

In preparing for the follow-up meeting where the results of the Skills Audit are discussed, the team leader or supervisor will check the workbook and assign skill levels to the additional activity information provided by jobholders. The resulting extra information on skills and levels should be registered by additional ticks in the relevant cells of the skills profile.

By inspecting the completed profile, the team leader or supervisor can decide the level at which the jobholder can be expected to use each skill element in the forthcoming period.

For example, the advice given to the Administrative Officer whose Spotlight skills are profiled in Figure 4.4 might be as follows:

- In routine work situations, you are exercising independent skills in automatically monitoring your own reactions and those of others (A2), in using both verbal and non-verbal communication (B2) and in managing intercultural interactions effectively (B3). The use of these skills can be consolidated further in the coming months.
- You need no prompting when it comes to making accurate assessments of the impacts of your actions in everyday work situations (A3). This means you are ready to work in more unfamiliar situations where impacts are not so clear cut. We will need to identify and provide opportunities for you to do this.
- You will be given further opportunities for solving problems in monitoring contexts (A1), interpreting challenging situations (A1) and taking part in demanding negotiations with customers, contractors or other people outside authority lines (B1).
- You have a range of problem-solving skills in effectively managing your own work and determining priorities (C1). You will be asked to share some of your tricks of the trade in this area in team or coaching situations.
- In routine situations, you are working in well with colleagues' requirements (C2). This skill can now be applied in more demanding situations where you will need to solve coordination problems.
- You have not been called on to respond to emergencies or major workflow disruptions (C3), but as you are handling interruptions in your own work (C1) at the problem-solving level, in the next appraisal period, you will be called on to help out in situations such as system outages.

PLANNING PERSONAL DEVELOPMENT TARGETS

As part of their completion of the Skills Audit, jobholders are invited to circle activities aligned to particular skill elements and levels in which they would welcome the opportunity to learn and develop.

Performance review discussions can be used to clarify existing skill levels and to set learning targets.

A neat graphical way of representing these skill levels and stretch goals using the Stretch Goal Profile is demonstrated in Figure 4.5. The information is transferred from the bar chart Job Skills Profile to a radial diagram, allowing ascending skill levels to be mapped outwards from the centre. Linked along axis lines, these reveal gaps in skills and experience levels.

Figure 4.5: Stretch goals negotiated during performance management process
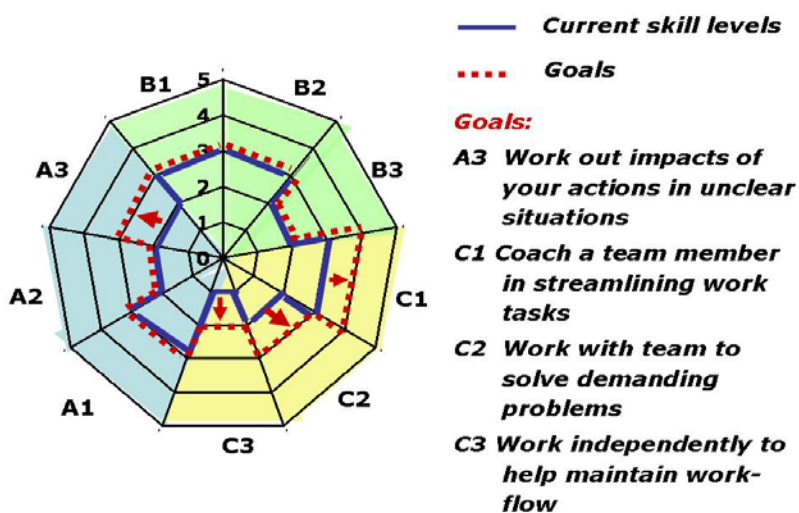
The four red arrows provide a handy reminder of a negotiated agreement between jobholder and team leader or supervisor. They indicate that:

- experiences will be provided to aid skill development in the four areas listed
- the jobholder will use these opportunities to build problem-solving and solution-sharing skills.

The specific goals will depend on the work being done. In the example in Figure 4.5:

- The jobholder is planning to move to level 3 (problem-solving in the course of normal work activities in the A3 area of judging impacts. This will require that she be entrusted with more challenging and less clear-cut assignments.
- As the jobholder is already solving problems in organising her own work, she will move to a level 4 coaching role by sharing her approaches with a team member – perhaps showing how to automate a system, set up and analyse records or plan ahead.
- A more challenging team project, involving serial or pooled interaction will enhance problem-solving skills in collaborative interweaving of activities.
- Finally, the jobholder has had little experience in crisis-management, but will be given the opportunity to practise working on routine system maintenance and trouble-shooting.

If a jobholder wished to concentrate on one of the three sets of skills, for example interacting and relationship-building, a radial diagram with stretch goals could be constructed for just this area using the Stretch Goal Profile.

In Figure 4.6, the jobholder is aiming to become fluent and practised in interacting with people from diverse cultures and in maintaining boundaries (for example saying 'no' to requests that are likely to be a sidetrack. In the area of verbal and non-verbal communication, the jobholder agrees to take on more difficult roles, for example, dealing with inquiries requiring complex explanation or inquiries from aggressive clients.

Figure 4.6: Mapping existing skills and stretch goals for a single skill set
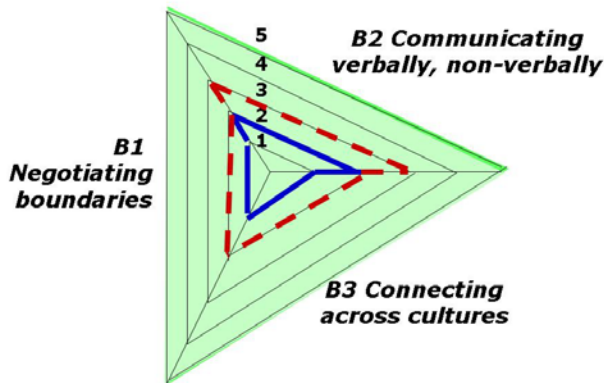
This approach to performance management will, in most cases, be a constructive one, integrating it with learning and development:

- Feedback will be based on objective evidence supplied by jobholders and so will not come as a surprise or be contested.
- The jobholder will have a complete, accurate and agreed profile of less visible skills and know that the organisation values these skills.
- Any apparently exaggerated self-assessment by jobholders can be resolved by asking for and discussing more concrete critical incident examples.
- Unrecognised skills may be brought to light.
- The focus of the discussion will be on adding to these skills within a negotiated timeframe.

USING SPOTLIGHT IN CAREER DEVELOPMENT

The Spotlight skills framework, being based on workplace learning, lends itself to the structuring of development opportunities designed to foster a deepening of skill levels.

In order to help in the full utilisation of this learning, the Spotlight approach also provides concepts and tools for structured career development, whether based on horizontal or vertical movement within the organisation, or whether based on project work and other forms of job enrichment. This approach is effective in terms of quality, innovation and cost, because it aids staff retention.

A starting point for any form of internal career mobility is the recognition of skills acquired through workplace learning.

Structuring learning activities and documenting learning

The Spotlight framework can be used in structuring workplace learning through:
- individual problem-based learning
- mentoring programmes
- team-based reflection
- collaborative learning projects and action research
- the use of developmental teams, consisting of people at a range of proficiency levels, with a view to cross-training and providing understudy support, releasing some team members to extend their capacities even further.

Because the learning will arise out of workplace experiences, it would be artificial to write scenarios, but Table 4.4 contains a suggested format for critical incident discussions of activities.

Individuals and teams can be encouraged to document their uses of the various Spotlight skills. Evidence portfolios can take the form of descriptions of critical incidents where jobholders solved a problem or learned something particularly significant.

As with the use of Spotlight tools to supplement performance management techniques, this approach does not require the expensive introduction of new programme initiatives. Rather, use of the Spotlight framework allows existing activities to be seen as learning opportunities, building workplace learning and its recognition into everyday practice.

A framework for recognising workplace learning

Jobholders who have been working in their jobs for some time without formal qualifications are now increasingly being required to formalise their knowledge by studying papers. Sometimes, these papers cover entry-level skills in areas where experienced jobholders are already proficient. The research underpinning the Spotlight project suggests that, whilst jobholders may find this frustrating, they particularly enjoy learning about recent innovations, and they do welcome the formal knowledge that puts long-standing practice into perspective.

There was some feeling that time and money could be saved by increased use of recognition of current competencies and experiential knowledge derived from work experience. In some fields, whilst staff who enter with formal qualifications have the opportunity to build on these qualifications through the formal recognition of further learning, staff with more limited entry qualifications may receive less formal recognition for in-service learning.

A major issue is the lack of a framework for recognising deepening levels of social and organisational skills, and other practical skills acquired in work contexts through problem-solving and solution-sharing.

Spotlight skills, once fully specified, may become available for inclusion in recognition of prior learning/current competencies processes. The major contribution of the Spotlight approach, however, is that it assigns learning levels to social and organisational skills developed in the workplace, up to and including the level of helping to shape work systems. Figure 4.1 shows the scope for bringing quite advanced informal skills into formal training and recognition frameworks.

Practical uses of Spotlight tools to help enhance career paths

The learning and use of Spotlight skills can be recognised through performance management or the certification of workplace learning. The elements and levels recognised in this way can contribute to skill mapping or competency profiling exercises.

Jobholders and teams may profile their own skills and skill levels, highlighting those that are easy to overlook or discount. This will allow managers to locate unidentified sources of talent. These individual skill profiles, when put together, will create a competency profile of the work unit.

As the Spotlight skills are added to position descriptions, a map of jobs requiring these skills at different levels will emerge. The Spotlight framework can help to match up the hidden skills of the individual with the hidden demands of jobs.

In this way, Spotlight tools can help to identify three potential avenues of individual career mobility, based on three different types of career pathway:
- Movement between different jobs requiring similar Spotlight skills.
- Progression through similar jobs requiring a deepening of Spotlight skills.
- Recognition of different stages of expertise within the one job.

Rotation within different jobs requiring similar Spotlight skills

Once a job's hidden skill demands are identified, it may come to be understood as part of a wider job family than hitherto assumed. Job families are clusters of jobs or occupations grouped on the basis of work performed, skills, education, training, or credentials. The Spotlight framework offers managers a wider and more accurate set of criteria upon which to group jobs into families, potentially increasing internal job mobility.

Conversely, clearer identification of the less visible skill demands of a job may minimise ill-advised internal transfers, by giving substance to a gut feeling that an internal applicant may not be quite right for a particular position.

By helping identify jobs using similar work process skills in different work areas, the Spotlight may aid internal mobility, contributing to retention.

Progression though similar jobs requiring a deepening of Spotlight skills

The most familiar patterns of such progression include sequences such as that from customer service representative to team leader. This progression involves matching the escalating difficulty of cases to the deepening problem-solving capacity of experienced jobholders. For example, particularly difficult calls may be escalated to a contact centre team leader, who may also provide coaching to less experienced staff.

Recognition of different stages of expertise within the one job

Project interviews provided examples of jobs where people felt thrown in at the deep end from the beginning. Some work teams responded by informally reallocating work in a hierarchy of difficulty. Recognition of such skill hierarchies would prevent stress-related turnover of inexperienced staff and add to the satisfaction of more experienced staff.

The most novel contribution of the Spotlight approach is that it allows the recognition of a sequence of experience-based learning levels in jobs hitherto seen as low-skilled.

Research suggests that high turnover in caregiving jobs is linked to dissatisfaction with pay structures that do not reward the accumulation of skill over time. The currently favoured solution - opportunity to retrain for a higher-level occupation such as nursing – will help in some cases but does not address the need to retain skilled, experienced caregivers. Recognition and provision of new challenges for employees who have plateaued in their current jobs is a cost-effective way of retaining sources of quality and encouraging innovation.

Skill deepening – job enrichment, job rotation, project and team work

Where there are limited prospects for conventional internal career pathing based on job mobility, it will be possible to explore new avenues for skill deepening and job enrichment, by recognising and expanding the demands and potential of existing jobs.

Table 4.3 provides some possible ways of drawing on all five Spotlight skill levels within jobs. Such an approach has the potential to reduce mid-career and later career turnover. It is useful at a time when organisations are facing the need to transfer tacit knowledge as experienced workers retire.

Table 4.3: Using the Spotlight levels to create career progression opportunities

Level 1. Familiarisation – shadowing more experienced colleagues

Level 2. Automatic fluency – achieving automatic expertise in a range of standard settings

Level 3. Proficient problem-solving – moving to a more challenging role, perhaps with another team, or experimenting with a planning and development project

Level 4. Creative solution-sharing – within and cross-team briefings, sharing tricks of the trade for dealing with challenges

Level 5. Expert system-shaping – documenting and publishing project results

Table 4.4 contains a list of critical incident questions that can be used in career development interviews with jobholders, in order to pinpoint more precisely the tacit skills acquired informally through work experience that jobholders may be deploying without full awareness – either by themselves or by their supervisors – of their contribution to work processes.

By targeting specific Spotlight skill areas, team leaders and supervisors can contribute both to staff and team development, career pathing and quality of work performance, for example, by pinpointing learning needs.

Contribution of the Spotlight approach to career management

The skill levels offer a developmental approach to improving quality, both individual and collective, and to building the capacity for innovation and work process improvement.

The concept of career development is meaningfully extended to include mobility across extended job families, linked by similar social and organisational skills. Such mobility may also occur within jobs whose higher-level skills have been under-recognised.

The Spotlight approach to career management is thus part of its contribution to a simple, integrated human resource management approach linking:

- the management of employee performance
- the recognition and development of tacit skills
- the retention of skills through the use of tacit skill frameworks in career pathing.

By helping classify, develop and retain under-specified experience-based work process skills, the Spotlight tool can contribute to the achievement of the three organisational performance goals of quality, innovation and efficiency.

Table 4.4: Critical incident questions

SKILL SET/ELEMENT	1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
A. Shaping awareness – capacity to develop, focus and shape your own and others' awareness of work contexts, situations and impacts					
A1. Sensing contexts or situations – capacity to notice, interpret and understand the significance of wider job contexts or changed workplace situations	**Build up a general understanding of terms and technology used by specialists in the work area.** You have not been employed in the work unit for very long. You are working with a range of people who have quite specialised knowledge, and there are many technical terms to learn. Some of them you can't spell, and you are not sure that you are even hearing them correctly. There is unfamiliar equipment that you haven't been shown how to use, and you are worried about making mistakes and causing equipment to break down. Also, clients and colleagues refer to people who are unfamiliar to you. What is the best way of dealing with these difficulties?	**Draw on wider experience of workplaces to fit in with the styles of different work groups.** In working with people from different parts of the organisation, what is a good approach to making sure you understand their expectations?	**Solve a problem for a client or colleague by sifting key issues from masses of detail.** Have you had the experience that, when people are worried or upset, they seem to give you a whole lot of information, and it can be quite hard to sort out what the problem is and how to solve it? Talk about examples of such situations and good ways of handling them.	**Handle uncertainty by exchanging rapid situational updates with colleagues, using codes or signals.** Let's brainstorm situations where you need to work with team mates whilst things are rapidly changing around you. It is important that you all have the same understanding of what is going on, but there is no time for lengthy discussion. What is the best approach to operating in such a situation?	**Use understanding of the organisation's priorities to influence systems and policies.** What are good ways of keeping up to date with developments inside and outside the organisation so that you are in the best position to influence policies or priorities?

SKILL SET/ELEMENT	1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
A2. Monitoring and guiding reactions – capacity to monitor and guide your own and others' reactions, or manage situations where awareness levels vary	**Learn to recognise and deal with your own responses.** Let's discuss situations in which it has been important to set aside prejudgements of other people. Perhaps you took an instant dislike to them or their ideas, or perhaps their behaviour seemed odd or unexpected. What were some ways of managing your own reactions in dealing with such situations?	**Through practice, control your own reactions in very difficult situations, and cross-check how another team member is coping.** Discuss situations when it has been necessary to monitor your reactions and those of a team partner. This might have been a situation in which someone tried to provoke you or a situation that was quite frightening, disgusting, difficult or dangerous. In such situations, what are good techniques for keeping control of your own reactions and cross-checking how your colleague is coping?	**Handle situations where participants have varying levels of awareness and want different degrees of disclosure.** Situations sometimes arise in which different participants have different levels of understanding about what is happening. Maybe, for example, a client does not want family members to know the details of the matter under discussion. Discuss some of the ethical issues that may arise in such situations and also the practical details of how to handle them.	**Pick up on the work-group's emotional undercurrents, power relationships and current strengths and needs.** How do you key in to what is going on with other team members and also to the dynamics of how team members are impacting on each other? Discuss ways of handling the undercurrents and power games that may arise in a team and ways of using strengths and addressing needs so that the team functions effectively.	**Anticipate negative responses and have insight into your own impacts on the situation.** Discuss ways of foreseeing and addressing resistance to your pet proposal. How do you know when to persevere and when to let go?

SKILL SET/ELEMENT	1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
A3. Judging impacts – capacity to evaluate your own or team's impacts in the workplace or on clients or community	**Learn to read a situation, and consider consequences before responding.** Discuss a situation where it is hard to know how to react because of difficulty in predicting the likely consequences of your reaction. By talking about examples, work out a good set of approaches to this and similar situations.	**Sense the point at which others are beginning to be uncomfortable and automatically act to minimise their discomfort.** Discuss situations in which it is important to be alert to the sensitivities of others. How do you pick up on the discomfort or embarrassment of other people, and what are ways of minimising it?	**Pick the right approach to a client or colleague, judging impacts by sifting through ideas, keeping them relaxed whilst using technology.** Think of situations in which you need to adjust your approach as you go, by monitoring its impact. You may need to keep people relaxed, whilst you are using technology in working with them, and thinking through a range of possible solutions. Brainstorm examples of such work, which involve concentration on carrying out processes whilst assessing impacts and adjusting approaches. Try to work out the keys to doing this effectively.	**Help create a supportive context for challenging practices that are not having good impacts.** How can you go about challenging practices that are having adverse impacts, without getting other people offside?	**Assess flow-on impacts of decisions to other parts of the organisation or to the longer-term impacts.** Think of some decisions or actions that have had unintended flow-on consequences, either for other areas of the organisation or for longer term outcomes. Brainstorm ways in which such consequences might be foreseen and minimised.

SKILL SET/ELEMENT	1. Familiarisation	2. Automatic fluency	3. Proficient problem-solving	4. Creative solution-sharing	5. Expert system-shaping
B. Interacting and relating – capacity to negotiate interpersonal, organisational and intercultural relationships					
B1. Negotiating boundaries – capacity to set your own boundaries and respect those of others, or influence or negotiate within and across boundaries	**Learn to establish the boundaries of your role, knowing when it is unwise to step in, and ensuring that you have the understanding and consent of relevant people.** Discuss some of the boundaries of your role. Start with issues that are clearly inside and outside these boundaries and then focus on some areas that are not quite so clear. What are some situations in which it would be unwise to proceed? When it is necessary to act, what precautions is it wise to take?	**Deftly set your own boundaries and respect those of others.** What are some smooth techniques for doing the following? • Setting clear and consistent limits to the behaviour of others. • Provide necessary support unobtrusively, without undermining the independence of others.	**Pleasantly confront problems head-on and hold your ground.** Discuss ways to do the following: • Deflect pressures to over-commit yourself or the organisation whilst retaining goodwill. • Get people to face up to problems. • Find a pleasant way of saying 'no' or 'not now', including to people with more authority. • Negotiate or advocate in a way that retains goodwill, without giving way on the bottom line.	**Tactfully manage up within the work unit.** What are some approaches to doing the following in acceptable ways? • Giving negative feedback to people in more senior positions. • Quietly sharing your knowledge with more senior but less experienced colleagues. • Gaining the cooperation of people who are resisting your authority or advice.	**Build support for your proposals.** What are good ways of gaining initial support for a change proposal? How can you build that support, and keep the initiative going?

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B2. Communicating verbally and non-verbally – capacity to respond to and use verbal and non-verbal communication adaptively or aesthetically	**Learn to listen, to respond to non-verbal cues and to put people at ease.** How do you interpret the needs and intentions of people who have restricted verbal language or mobility? What are some good ways of putting people at ease at different stages in an interaction?	**Use voice, body language and surroundings to communicate.** Discuss as many ways as you can think of for putting other people at ease when they need reassurance in the face of unfamiliar settings or procedures.	**Solve complex group communication problems.** What are some ways of holding the attention of everyone in a group of people who have varying attention spans? This skill might be needed if you were giving a presentation to a group. How would you make sure that people with varying levels of language understand each other? Examples would be helping a senior doctor and a child to understand each other, an IT expert giving an explanation to a beginning computer user, or helping a lawyer communicate with a drug-affected person. Think of other examples and discuss them.	**Use communication creatively.** Discuss creative ways of communicating in the workplace. For example, how would you get non-technical people to understand a technical issue and its solution? Can you suggest memorable catch-phrases that might serve as a shared guide to action? Think of situations in which it would be good to have everyone following some rule and a slogan to make it easy to remember. How could the physical resources of the work space be used to build a more stimulating or reassuring environment?	**Use a communication systems influentially.** Think of a message that you wish to get across clearly and persuasively and identify a way of doing so, by: • identifying the audience and using apt or memorable language or images that crystallise their aspirations • defining aesthetic and ethical values • suggesting political and communications strategies.

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B3. Connecting across cultures – capacity to develop awareness of diverse cultures and understand your own cultural impact, or build intercultural trust relations **Note:** Most organisations will provide intercultural training. These examples are sketched in mainly to indicate levels.	**Learn to interact easily and respectfully with people from diverse cultures.** Learning activities might include the following. Learner-led sessions designed to reinforce accurate pronunciation of personal and place names and use of greeting systems for main language groups encountered in the workplace. Learner-led presentations and discussion activities covering: • developments relating to whānau, hapū, iwi and related kaupapa • key culturally appropriate concepts, values, processes and protocols relevant to the work area.	**See one's own and work team's behaviour from the perspective of another culture.** Learning activities might include the following. Identification of correct community spokespeople to approach for specific purposes. Analysis of implications for the work area of Treaty of Waitangi obligations (participation of Māori at all levels, partnership in service delivery, protection and improvement of Māori interests).	**Work with people from diverse backgrounds to help knock over barriers.** Discussion activities could include the following. Exchange of ways of working effectively with people who have different approaches to time (including children and elderly people). By thinking within different cultural frames, examining solutions to problems caused by clashes of values or cultural misunderstandings. Discussion of ways of complying with relevant values, for example, manaakitanga and whanaungatanga, protocols of engagement, of work setting, of organisation, and of community settings (such as marae).	**Learn from the perspectives of Māori staff and staff from other cultural backgrounds.** This is less a matter of specific workplace learning activities than an ongoing practice, fostered by the habitual approach of team leaders and managers. Most level 4 skills are advanced skills, normally held by members of Māori, Pasifika or immigrant communities or by pākehā who have had extensive immersion in one of these cultures. The skills, albeit often informal, require recognition. Examples include: • informally translate and interpret between work colleagues and members of cultural communities • key in to the subtext and dynamics of gatherings based on Māori or another language or culture.	**Work across cultures at the level of systems or immersion.** One level 5 skill that could be developed systematically through lengthy workplace development opportunities: • In consultation with appropriate spokespeople, work at a systems level to implement Treaty obligations of partnership, participation and protection of Māori interests. Again, most level 5 skills are acquired through long practice, not through structured workplace learning: • By immersion in a community, help build culturally appropriate programmes. • Fluently use te reo Māori, a community language, NZSL, Braille, or Makaton.

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C. Coordinating – capacity to organise your own work, link it into the overall workflow and deal with disruptions					
C1. Sequencing and combining activities – capacity to organise your work by prioritising, switching, combining and linking activities	**Learn to sort and streamline your own tasks.** What shortcuts and reminders have you developed in order to help you streamline your work? How do you go about sorting your own work tasks in order of priority?	**Link up tasks into a smooth and automatic sequence.** People often say that they are doing several things at once. Try to analyse what you are actually doing in such cases. Are you switching back and forth? Are you doing some things automatically? Try to provide examples. Try to think of concrete examples of how you handle interruptions and get back to the same point.	**Solve coordination problems.** Talk about examples of situations in which you have needed to assess the urgency and importance of simultaneous calls on your attention, any of which could become a crisis. How did you know which one to attend to? Provide an example of how you mentally reorganise your priorities for the day as new demands arise. On what the basis do you do this? Give examples of splitting your attention between the immediate task or person, and what is happening in the background. How do you manage this? Provide examples of where you have needed to think quickly on your feet, for example, if someone challenges you unexpectedly, or equipment malfunctions during a task.	**Exchange tricks of the trade.** How do you and colleagues informally share tricks of the trade or exchange short-cuts that you have developed? Please share any techniques you have developed for recording key details of events and interactions as they happen, to allow effective follow-up.	**Embed coordination ideas in work systems.** An information-sharing session could discuss the following topics: • Have you found a way of pursuing long-term goals? How do you manage to do so? • Do you have a range of initiatives at various stages of completion, and if so, how do you manage them?

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C2. Interweaving your activities with others' – capacity to follow up tasks and follow through on undertakings, or interweave your contribution smoothly with that of others	**Knowing how to interrupt and keep track when working with others.** A useful information–sharing session might be had on these apparently simple topics: • What is a good way to interrupt colleagues, in terms of timing and approach? • What is your system for ensuring that information is passed on accurately and promptly to other people? • What have you found to be a good way to keep track of loose ends that need to be followed up with other people?	**Work flexibly with others.** When other people are involved, it is often very difficult to ensure that issues are followed through to completion. Do you have any suggestions for achieving this? How do you make sure that you are not duplicating the work of others?	**Solve coordination problems in working with others.** What challenges arise when working in a team in a rapidly changing situation? What techniques have you developed for dealing with these challenges?	**Develop ways to improve team communication.** Let's brainstorm methods that you might use to ensure that team members are in good communication with each other when it matters, for example: • use of communication shortcuts such as mental maps, flowcharts, coding systems, templates • setting up communication lines to mobilise well-targeted response services or support networks • ways of planning long-term work cycles so team members are available to each other at peak times or when challenging work is being undertaken.	**Develop systems for embedding innovative solutions.** Sometimes, clever solutions can be forgotten or lost if they are not made part of the system. Consider ways in which new solutions can be retained and put into circulation. • This might be an information network for accessing, tracking, sharing and building on solutions. • It might be a way of maintaining key records and setting them in a long-term perspective so that people have a sense of direction and don't keep reinventing the wheel.

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C3. Maintaining and/or restoring workflow – capacity to maintain and balance workflow, deal with emergencies, overcome obstacles, or help put things back on track	**Learn to cope with upsets and disruptions.** Please share any strategies that you have developed for doing the following: • Patching up minor misunderstandings before they escalate. • Rebalancing your emotions and refocusing quickly after something goes wrong. • Dealing calmly with a system breakdown or emergency.	**Automatically take steps to keep systems running.** Please share any techniques you have developed for fixing things up and keeping the work area running. This might involve: • dealing with things that have not been followed through, without undermining others but without letting them get away with it • developing safe knacks to keep fault-prone equipment running • thinking ahead and planning to ensure that all needs of a dependent client will be met between appointments. Please share any further examples of cross-checking, patching up or forward planning.	**Prevent problems from developing through solutions developed on the run.** Discuss ways of making safe decisions in circumstances where not all the necessary information is available, or where information is ambiguous or rapidly changing. Please share any solutions. For example: • Are there ways of identifying minor issues that may grow into bigger problems and ways of acting to prevent this from happening? • Have you developed a fail-safe tracking system?	**Establish shared ways of working around problems.** Have you and colleagues worked out shortcuts, ways of fine-tuning systems or ways of working around bottlenecks? They may include: • cultivating contacts inside or outside the organisation who will help with fast-tracking • legally and ethically fine-tuning or tweaking the timing of outlays, so that you make optimal use of budgets • developing shared approaches to use in high pressure or emergency situations.	**Anticipate system failures by ensuring back-ups are in place.** Could you please share techniques you have developed for safeguarding against the effects of bottlenecks and breakdowns? How would you restore relationships or morale after a crisis?