

Building and Strengthening The XYZ ABC Counseling Center Team: How DRI Consulting Would Help (Draft Workplan)

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We outline below the steps we would take to quickly and effectively help your organizational planning (shared goals/methods, staff changes, etc.), team development and personal skill building (as counseling center staff and leaders). These steps have proven successful with many of our clients. Specific features of our approach include:

- ❑ A **project approach** to the work with written plan, defined roles and specific deliverables. A collaboratively staffed project leadership team (in this case, John Achter and John Fennig) oversees the work and results.
 - ❑ A **close working relationship** with XYZ ABC Counseling Center staff participating in the project.
 - ❑ **“Fast cycle time”**. We overlap information gathering/ measurement, implementing solutions and delivering results to improve the strength of the project and speed up its completion.
 - ❑ Leveraging the multiple factors of **individual personality, team characteristics and organizational structure** to achieve good results.
 - ❑ The ability and preference to **capture what is good and working**, building on your strengths to manage and minimize weaknesses. We suggest a focus on decision making, planning and implementing real world solution, rather than a focus on problem solving. We will flag internal weaknesses and potential organizational threats, but work with them within a context of success/motivation. We are experts but also facilitators.
 - ❑ Use of Collins and Porras’ **“Built to Last”** model for building great organizations – core ideology (values & purpose) and envisioned future (big goals and vivid descriptions) – *or a model/text you prefer or are already using.*
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Draft Workplan

- I. **Project planning and pre-work: Get to know the organization, the team and its individuals – where you are and where you want to be**
(Completed no later than one week prior to first work session in late August)
 - A. Confirm the project leadership team (PLT), staffed jointly by designated XYZSCC staff and DRIC.
 - B. PLT meets to finalize the project plan – roles, responsibilities and best methods for each step in the plan.
 - C. DRIC staff interview each XYZSCC staff one-on-one and in-person (or by phone if necessary) for 30-45 minutes.

- D. Design, distribute, collect and summarize a short web-based survey to get input about the team from the team and, perhaps, key others (who use, support or partner with the Counseling Center)
- E. Administer one work personality assessment.
 - 1. Profiling done conveniently online from any browser, requiring about 15 minutes from each staff member, using a top tool in consulting psychology: the FIRO-B.
 - 2. Generate group personality summary to assist in defining the team's strengths, weaknesses and overall team work personality.
- F. One meeting prior to the first work session with the Center Director (and others, if desired) to assimilate and understand the information collected to date, modify project plan and drive results.

II. Facilitated Work Sessions: Work with the team and its individuals in a series of 3 hour meetings, according to an agreed upon plan and budget, to:

- get results
- build the team
- build skills for capacity and sustainability
- have fun

From the suggested 3 work sessions, you will get:

- A. A developmental framework and assessment – from Tuckman's stage model
- B. A simple but powerful planning model for working together more consciously and effectively (either "Built to Last", your own methodology or a combination)
- C. Three facilitated work sessions using real world situations you face as a team, with people serving in the real world roles they play on the job.
- D. Insight into the team's current stage of development, work personality/culture.
- E. Applied tools to use the insights in (D) to increase the team's effectiveness and speed in getting further along in your planning and development.
- F. Through A-E above, realizing real world work results during and quickly after the facilitated sessions.
- G. Individual support to team leaders during this project.

Options: Specific options include

- Individual work personality assessment feedback.
- Further work team facilitation/building.
- Assistance assessing future job candidates for positions. Would be priced collaboratively with you based on your needs.
- Management development coaching for individual team leaders. Would be priced collaboratively with you based on your needs.

We look forward to hearing from you to finalize this draft Workplan and get started!

Work Personality Assessment Tools for Leaders, Managers, and Individual Contributors

DRI Consulting’s proven menu of assessment tools include customized, real-world, in-person competency measures as well as standardized self-report measures of work personality. Together these make a powerfully descriptive and predictive product. Additionally, the “useful life” or shelf-life” of the information is 5 to 10 years and beyond.

Blue highlighted is the 1 we recommend initially for this project – the FIRO-B. This tool offers an (confidential) individual and (shared) team picture on 3 key elements of team and interpersonal success. Others described and available for use as well.

TOOL NAME	FEATURES	BENEFITS
DRIC Personal History Survey©	A comprehensive history of job history and functions, education, family background, career aspirations and expectations.	Provides a systematic and thorough context for all other assessment and development work
DRIC Job Functions Survey©	A checklist of work skills and interests	Analyzes the gap between skills and interests in the most common work positions
CareerWorks Survey©	A checklist to assess strengths and weaknesses relative to an effective job change or business launch	Offers a systematic way to plan for an effective job change
California Psychological Inventory™ (CPI)	Assesses intra- and inter-personal style and achievement orientation in both professional and personal lives; uses styles to predict career fit	A powerful tool used to find and develop successful employees and developing leaders. Allows comparison to successful manager profiles
Myers-Briggs Type Indicator® (MBTI)	The most widely-used personality inventory in the world; determines preferences on four aspects of personality	Explains interpersonal interactions and communication styles, decision-making and information-gathering approaches
Fundamental Interpersonal Relations Orientation™ (FIRO-B)	Assesses personality dynamics, ways that personal needs affect interpersonal relationships in the workplace	Useful for screening for personnel selection, predicting leadership potential, highlighting development needs
Strong Interest Inventory® (SII)	Used for career exploration; provides job change information; useful in career development	Assesses interest and ability in careers involving management, decision-making, leadership
Thomas-Kilmann Conflict Mode Instrument© (TKI)	Measures preferences for competing, collaborating, compromising, avoiding, and accommodation in conflict situations	Provides information on leadership and interpersonal style in conflict situations, and points to develop-mental needs
Employee Aptitude Survey (EAS)	Timed measures of mental ability: vocabulary, math, numerical reasoning and verbal reasoning	Provides 4 measures of mental ability and comparisons to others in similar work positions. Helps predict job success and requirements for success
Watson Glaser	Un-timed measure of mental ability, including these thinking skills: inductive, deductive, analogies	Provides a measure of mental ability and comparisons to others in similar work positions. Helps predict job success and requirements for success
360-degree Assessment	Custom-designed to assess participants' competencies and attributes as defined by the organization.	Provides comprehensive information from superiors, peers, directs, stakeholders, and participants

Work Team Facilitation

Top considerations:

- The leadership team/system is the first and most important factor of organizational success.
- Teams go through natural and predictable stages. Movement through them can occur faster and better with conscious effort, some key activities, and outside help.
- Being purposeful, intentional, and conscious about stuff – as individuals and collectively as a team – is really important/makes a difference as to how well we do.
- Goal setting works.
- Sometimes its just fun to get together and do stuff that is different from work, and that also benefits it!

How we help:

Work closely, quickly (leveraging things good, working and already in place) to:

- Get to know the organization, the team and its individuals – where they are and where they want to be
- Identify the vital few and timely things that will close these gaps, affirming what is good and working already
- Work with the team and its individuals, according to an agreed upon plan and budget, to:
 - get results
 - build the team
 - build skills for capacity and sustainability
 - have fun

Key tools we use:

- Information gathering tools (based on business and psychological science) – surveys, interviews, observation, testing
- Facilitated work sessions/team building – with prework, co-delivery, real-world focus – done incrementally within the agreed upon timeframe
- Methods to track progress and results
- Individual consultations/coaching
- Website as project bulletin board

Some of those whom we have helped with executive team building/organizational planning:

- Over 30 small group and private psychological practices nationally (1995 to present)
- Minnesota Psychological Association (MPA) Board
- Society of Consulting Psychology (APA Division 13) Board and membership
- Park Nicollet Pulmonary Department Physicians
- Society of Jesus/The Jesuits (1993 to present)
- Meier Kennedy and Quinn Law Firm Partners
- Good Shepherd Sisters, St. Paul Community
- City of Minneapolis – several departments (2000 to present)
- Ordway Theater – Board and Staff
- Norwest/Wells Fargo Corporate Trust (1995 to present)
- 3M Industrial & Transportation Business Services
- US Army Corps of Engineers – 5 districts

Select recent presentations Dr. John Fennig has given/will soon give:

- **Coming up: Exemplary Applications of the Organizational Consultation Education and Training Guidelines.** APA Annual Meeting. 8/2006
- **Technology and Transparency: Two Key Toolboxes to Do Psychology Well.** The Ohio State University Counseling Psychology Department Alumni Reunion. 4/2006
- **Better, Faster, Wider, Cheaper: A Decade of (Largely Successful) Internet Use** - within the panel: **Ethical Considerations of Cross-State and Cross-National Consultation Using the Internet.** APA Annual Meeting. 8/2005
- **Leadership Skills for Administrative Professionals.** International Association of Administrative Professionals (IAAP). 1/2005, 1/2004
- **Assessment Skills Workshop.** Society of Consulting Psychology Mid-Winter Meeting. 2/2005
- **The Good the Bad and the Ugly: Cases in Consulting Psychology.** APA Annual Meeting. 8/2004
- **Introduction to Consulting Psychology.** Several workshops over last 15 years to experienced psychologists, emerging professionals and graduate students.

Of relevance, but awhile back!

- **A Study of the Big Ten College Counseling Centers Intake Systems.** Midwestern Psychological Association Annual Meeting. 4/1988