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)?
<table>
<thead>
<tr>
<th>Problem Solving Steps</th>
<th>Critical Feature Response</th>
<th>Facilitation Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-Step and 8-Step</td>
<td><em>Observe each step in the process and document your observations using the prompts below. Be concrete, detailed, and behaviorally descriptive.</em></td>
<td><em>Tally the # of times each was used, verbalizations can be counted more than once; categories are not exclusive.</em></td>
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<tr>
<td><strong>Step 1</strong> Problem ID</td>
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</table>
| **Step 1 – Define priority, set goal and determine how the goal will be measured** | Was the problem sufficiently clarified and understood by all? Why or Why not?  
Did the group reach consensus regarding the problem and goal identified?  
Was a method of measuring the outcome identified (if data doesn’t exist was a plan developed to obtain these data)?  
Was the problem and goal described in concrete, descriptive, behavioral terms? |                     |
| **Step 2 – Identify barriers and resources** | Were brainstorming procedures explained (free-flow technique, round-robin technique, pass-option, etc.)?  
Was sufficient effort invested into identifying resources/barriers?  
If not, what could have been done differently?  
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)?  
Was one barrier identified and defined?  
Was a link established between the reduction in the obstacle and the overall goal (established in Step 1)? |                     |
| **Step 3 – Prioritize barriers** |                           |                     |

**Facilitation Skills**

- **Active Listening**
- **Summarizations**
- **Questions**
- **Information Gathering**
- **Clarifying**
- **Open**
- **Closed**
- **Paraphrasing**
- **Delivering Info & Ideas**
- **Integrating Information**
- **Empathizing**
| Step 3 Plan Development | *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 | Were alternative strategies for overcoming barrier identified?  
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)?  
Was one or more specific strategies selected?  
Were specific plans for implementing strategies developed in detail? (who, what, when)  
Were timelines realistic?  
Was a support person identified for each task?  
Were responsibilities for implementation clear to all participants?  
Was a plan for following up with persons responsible for action plans established for each strategy? | ____ # Active Listening  
____ # Summarizations  
Questions  
____ # Information Gathering  
____ # Clarifying  
____ # Open  
____ # Closed  
____ # Paraphrasing  
____ # Delivering Info & Ideas  
____ # Integrating Information  
____ # Empathizing |
| --- | --- | --- | --- |
| Step 4 Response to Intervention | *Step 7* – Evaluate if barrier was reduced  
*Step 8* – Evaluate if goal was achieved | Was a plan for evaluating *each selected strategy developed in Step 5* carried out (who collects and analyzes what by when)?  
Were identified data/criteria for implementation and outcomes reviewed?  
Were decisions made based upon the data/criteria reviewed? *(follow-up meetings only)*  
Were identified data/criteria for progress toward *overall priority goal developed in Step 1* reviewed (who collects and analyzes what by when)?  
Were decisions made based upon the data/criteria reviewed? *(follow-up meetings only)* | ____ # Active Listening  
____ # Summarizations  
Questions  
____ # Information Gathering  
____ # Clarifying  
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____ # Closed  
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