

## **INSTRUCTOR'S GUIDE**

### **Peer Coaching to Counteract Organizational Silence and Foster a Culture of Dialogue**

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#### **Resource files**

- Instructor's guide(this handout)
- PowerPoint Presentation
- Case Study
  - coach role
  - coachee role
  - observer role
- Worksheet 1: Personal reflection and small group exercise
- Worksheet 2: Personal action plan exercise
- Master Reference List (combined from the instructor's guide and PowerPoint presentation)

#### **Use of Resource Files (see Practical Implementation section for additional details)**

These resources are designed for use in a professional development workshop. Brief didactic components present key background information and the activities allow participants to apply their learning and practice skills, thereby enhancing their confidence and coaching behaviors to effectively assist colleagues in engaging in challenging conversations. The worksheet includes an exercise for the beginning and end of the workshop. The case is used for a trio (small group) application exercise before the final personal reflection exercise.

#### **Purpose and Educational Objectives**

The purpose of this workshop is to raise the level of understanding of senior faculty about the impact of organizational silence, to generate discussion about practices to support dialogue around challenging issues, and increase their ability coach others to have difficult conversations. In addition, the workshop will provide an opportunity for session leaders and participants to use best practices from their personal experiences to create a list of organizational structures that support a climate of dialogue.

#### *Educational Objectives*

After attending this session, attendees will be able to:

1. Identify the impact of organizational silence as well as practices that support dialogue around challenging issues
2. Describe a framework for coaching others to have difficult conversations
3. Apply the coaching framework in one's own practice/situation

## **Conceptual Background**

Dialogue is essential to transforming the culture of academic health centers, yet “organizational elephants” and silence are commonplace.<sup>1-3</sup> Without greater capacity to have difficult conversations, controversial, nuanced, and potentially disruptive issues remain unresolved and can lead to stagnation. Silence limits the flow of information needed for organizational learning and performance; in silence, the status quo is protected and change is stifled.<sup>4-6</sup>

Mentors, senior faculty, and institutional leaders can play key roles in building a healthier institutional environment by developing their own skills in having difficult conversations, and by coaching others to do so. It is common for mentors and senior leaders to be asked by peers and junior colleagues for advice about how to handle a difficult conversation. While many resources exist for improving one’s own ability to raise challenging issues (e.g., references 7-10), there are few resources regarding how to coach others to do so. Thus, despite being fairly common, many senior leaders are unschooled at coaching others about how to raise difficult issues. The professional development workshop described in this submission is intended to fill this gap.

By coaching, we do not mean the act of giving advice. Coaching entails facilitating another person’s self-awareness, helping him or her to clarify their thought process, develop their own solutions, and find their own voice.<sup>11,12</sup> This workshop is intended to help mentors, senior faculty, and institutional leaders develop an understanding of the core elements of coaching and improve their coaching skills through practice role play scenarios.

We use a variety of active learning strategies (personal reflection, a small group application exercise and large group brainstorming) as well as a case developed from our experiences as senior administrative leaders in academic medicine. We also draw upon our knowledge of the literature and our scholarly work in this area. A goal of this workshop design is to allow participants to learn from each other and to build a sense of community that encourages open and honest discussion during the session. Small group exercises are intended to increase the comfort level and participation of those hesitant to share ideas in a large group discussion.

## **Practical Implementation Advice**

This workshop is intended to be an interactive, discussion based professional development session. The target audience is senior faculty, administrative leaders and mentors from academic health centers and teaching hospitals. Aspiring leaders will also likely build skills through participation in the activities during the workshop. Facilitators desiring additional background information may want to read the recent article published by the authors in *Academic Medicine* (see reference #6). Additional readings which facilitators will find particularly helpful for further preparation include references 7-10.

The PowerPoint slides include background material to be shared in a brief didactic format to introduce key concepts and to frame the individual and small group exercises. The times delineated below are based on a 75 minute workshop and can be modified based on the overall time allotted for the session

and the size of the audience. If time allows, greater time for the discussion based components will also allow as many participants as possible to contribute to the conversations.

After a brief (5 minute) introduction about the impact of organizational silence, participants are asked to reflect on their personal experience and then share their perspectives in a small group discussion using Worksheet #1 (10 minutes). This exercise is based on the principles of appreciative inquiry<sup>13</sup> in which reflecting on the elements of a positive past experiences informs future actions. In this case, we ask participants to consider a time in which they felt comfortable raising a difficult work issue. They are asked to think about different contributors to the experience including the climate, the organizational structure, their relationships and themselves. The exercise is designed to allow participants to elucidate factors that allow one to feel safe to engage in challenging conversations, and to drill down on the details, such as the nature of the issue, elements of the organizational structure that facilitated safety, who else was involved, how they felt etc. The focus here is not so much on problems as on possibilities. One member of each small group is asked to document common themes that arise in the small group discussion on the worksheet. Each participant may document additional ideas from the discussion on their own worksheet if they would like to do so. If time permits, each small group or a representative number of small groups can be asked to share a theme from each category (climate, relationship, organizational structure, yourself) with the entire audience. Depending on the size of the audience, the workshop leaders may choose to use time for personal reflection followed by a large group discussion for this part of the workshop. One facilitator can record the themes shared with the large group on a flip chart in the front of the room. The facilitator can close this section by summarizing the themes and noting that these factors might be considered in completing the action plan exercise at the end of the workshop (see below).

A brief didactic presents a definition and framework for using coaching to help others build skills to engage in difficult conversations (10 minutes). Slides 8-9 of the accompanying slide deck present a brief overview of the differences between coaching, mentoring, and sponsorship. Each concept has similarities and differences, and the skills of coaching are emphasized in this talk. Then, slides 10-18 delve further into the skills of coaching. Slide 10 describes the coaching practice of “adopting an attitude of curiosity.” This means that it is helpful for the coach to assume that they do not know the whole story or have the solution. The coach’s job is to learn how the coachee sees the problem. In this stance, the coach’s role is not to provide answers or advice, but to give the coachee space to explore the approach they feel is best and that allows them to use words that feel authentic to them. Useful questions to develop a better understanding (and allow the coachee to explore their thoughts) are presented in the next several slides. Questions that can set the “future oriented” framework might include:

- What is the biggest issue you want to resolve in this conversation?
- Why is it important to you to have this conversation?
- What would a good outcome of this difficult conversation be?
- If this is a successful conversation, what will be changed?
- What will it feel like to you if this conversation is successful?

Slide 11 carries on this theme of using the coaching session to increase the coachee's ability to articulate their most compelling concerns about the situation, and to consider best solutions and "find their voice". Again, the focus is on the coachee, and on future solutions (as opposed to focusing only on understanding root causes of problems). Slide 12 emphasizes the role of a coach in honing the conversation in on core issues, using the coachee's values and most pressing needs as a guide to developing next steps. Slide 13 describes the coach's role in helping the coachee to expand their vision of events, consider alternative interpretations, entertain the possibility of blind spots and explore ways of gathering more information to make the best decision. It also asks the coach to raise the question of the coachee's responsibility to act (and to consider the risks and benefits of not acting). Slide 14 extends this consideration of the consequences of acting or not acting, giving the coachee the opportunity to imagine how their actions may play out in the future.

This background is designed to prepare participants for an exercise to be done in three member groups (trios). Each member of the small group is assigned a role: coach, coachee, and observer. Each member is given time to read a brief scenario that describes a specific perspective. The coach is a senior administrative leader and the coachee is an associate professor and clinical leader. The observer is provided with information to better understand the challenge being faced by the coachee and is also given some guidelines so that he/she can provide feedback to the participants in the role play. The coach and coachee have 5-8 minutes to participate in the role play. The observer then has 5 minutes to provide feedback to the participants.

The case-based, role play session is followed by a large group debriefing facilitated by the workshop leaders. Participants should be asked to share their experiences from the role play:

- What did the coach say/do that was particularly helpful?
- Were there aspects of the interaction between the coach and coachee that were surprising?
- What didn't work well/what would you do differently if you had the opportunity to practice again/coach someone in a similar situation in the future?
- What aspect of the interaction was especially helpful to the coachee?
- What aspect of the case/role play was particularly challenging?

One facilitator can document the key points made during the debriefing on a flip chart in the front of the room. To deepen learning, the facilitator can use the responses from the groups to encourage other participants to reflect and build upon the key points being raised. If time allows, additional scenarios can be used to allow additional participants to practice the coaching and the observer role.

After the debriefing, participants are reminded about the themes shared as a result of the first exercise. In a personal reflection exercise (Worksheet #2), recognizing their ability as leaders to influence institutional practices, participants are asked to document actions that would foster and support a culture of dialogue in their home division/department/institution/organization (10 minutes).

If time allows and participants are willing, attendees can be asked to share an action they will stop, start, or continue with the larger group.

One facilitator can summarize key concepts from the workshop to tie themes from each component and introduce additional resources/references to deepen learning. Participants should also be encouraged to ask questions at this time. Facilitators should encourage audience members to engage in answering the questions, using their own experiences and expertise. This will deepen conversations and provide perspectives beyond those of the workshop leaders.

The master reference list can be attached to the worksheets or given as a handout, as this can serve as a helpful list of recommended reading for participants. Alternatively, facilitators can use a sign-in sheet to collect email addresses so that a copy of the Power point slides, master reference list, and notes from the flip charts can be sent to all participants after the workshop.

As noted above, a flip chart, chalk or white board, or blank slides are needed to document ideas shared during the workshop.

### **How These Materials Have Been Successfully Deployed**

This workshop was presented at a national conference (the 2013 Association of American Medical Colleges Group on Faculty Affairs Professional Development Conference). The audience was comprised primarily of faculty affairs deans at U.S. medical schools, a group of institutional leaders often called upon for advice about, and management of, difficult issues. Evaluations from attendees documented the usefulness of the hands-on activities and the value of the “take home” messages provided during the session.

A key issue to consider in implementing this workshop is to ensure that the didactic presentations are brief to allow as much time as possible for the discussions and exercises. Facilitators should ensure that as many attendees as possible are given the opportunity to participate. This will likely require facilitators to call on audience members who have raised their hands. In addition, facilitators can encourage participation by audience members by throwing comments/questions raised by participants back out to the audience. This allows the expertise of the audience to deepen the learning of all. In addition, facilitators can move among the audience during the small group exercises and personal reflection exercises to ensure that all participants understand the exercise, to answer any questions and facilitate the discussions that are occurring.

The word “facilitators” has been used throughout this instructor’s guide to emphasize the workshop leaders’ role in facilitating the learning of others, rather than passively disseminating information or sharing only their perspectives.

### **Limitations and ideas for improvement**

This proposal is limited by not having more robust program evaluation data. Unfortunately, only 10 attendees completed the formal evaluation for the conference. However, because there are so few resources available on the topic of coaching others to counteract organizational silence, we believe it is

important to begin filling this gap by offering resources on the topic. More program evaluation data will be obtained from future workshops, and the program will be refined based on this data.

Workshops of this nature may also be limited by the level of knowledge and comfort of both the presenters and attendees in their ability to manage difficult conversations themselves. If this is of concern, it would be important to offer a companion workshop for attendees to improve their own skills in managing difficult conversations first, prior to this workshop on coaching others in how to do so. Two of the authors presented a workshop at the 2012 Group on Faculty Affairs Professional Development Conference and published an article in *Academic Medicine* on this topic.<sup>6</sup>

Additionally, the workshop may be improved through developing additional cases that show a variety of contexts, such as teacher-learner or mentor-mentee interactions, and cases that show difficult issues across different mission areas. However, we also suggest that facilitators ask for suggested cases from the audience members. While this requires facilitators to be nimble with their facilitation, it can create greater connection for audience members with the role plays themselves.

## References

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