



## **Competencies and Guidelines for Situational Outlook Questionnaire Practitioners - Part Two**

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Many of us use a number of assessments in our work as change practitioners. This two-part series shares a practical list of activities and practitioner competencies developed from my recent experience in debriefing the Situational Outlook Questionnaire (SOQ). The SOQ is a measure available through CPSB that examines several aspects of the work environment referred to as organizational climate. The process of debriefing the SOQ requires a multi-faceted knowledge and skill set. These debriefing competencies are important in extracting meaningfulness and usefulness from the data and in strengthening an effective SOQ intervention.

Part One described the specifics of understanding the client's needs, distributing and analyzing the measure, and preparing for the feedback session. Part Two considers the face-to-face session including delivery of the information, summarizing the result, and extending the experience into future-oriented next steps. Listed below are these three phases of the feedback meeting including the knowledge and skills required of the SOQ practitioner.

### **Delivery Of Information**

This stage involves full engagement in the content and process of the feedback activity. There is no right or wrong way to order the activities of an SOQ debrief. The following represents one way to deliver the information: a) Establish the physical and psychological climate. b) Gain agreement to agenda and time frames. c) Overview the SOQ history, psychometric properties and content. This takes about 10 minutes of meeting time using the *Assessing the Climate for Innovation* handout. d) Quantitative results. This takes about 30 minutes of meeting time using the data display graphs and charts. e) Qualitative results. This takes about 10 minutes of meeting time using the summary report. f) Recommendations. This takes about 10 minutes of meeting time and involves sharing some potential actions or recommendations that might be helpful to the client.

### **Some observations and pointers regarding delivery of information.**

- Setting the climate. It is important to begin immediately by establishing the climate. Learning occurs by breaking old paradigms. Arrange the physical space, and begin to establish the psychological space. The SOQ practitioner does not want to position themselves as the expert with all the right answers. He/she needs to provide some expertise but the 'answers' will come from the client.

- Work the Agenda.
- Debrief flow. The pattern of interaction may change over the course of the meeting. The amount of telling on the part of the SOQ practitioner will decrease over the course of the meeting and the engagement by the client will increase. Overall the pace will be slow and reflective. Give the client time to digest the data, develop comprehension and clarity, take ownership of the content and next steps. Techniques to gain closure and move forward include: a) moving on to the next chart in the handout material; b) asking closed focused questions; c) using transition phrases like "OK moving on to these..."; d) reflective silence and e) tone of voice.
- The client will be in a high state of learning. He/she will start by asking clarifying questions, pause and reflect, then verbalize the thinking. There may be a tendency of the client to focus on the critical aspects of the information.
- The SOQ practitioner fulfills four main roles. He/she responds to clarifying questions with factual answers, asks more probing questions, provides balanced focus toward the positive results and provides alternate scenarios as to what might be happening to cause a rating. The SOQ practitioner may want to be careful and consistent in stressing the fact that different points of view are valid. This helps both parties keep an open mind.
- Looking at the handout material together is helpful. It allows for reading, conversation, reflection and participation.
- This is a very busy time for the SOQ practitioner. The practitioner must hold several levels of thinking simultaneously. He/she is actively present with the client, is holding to what is known about climate, is holding to the goals and objectives of the intervention, and is holding the context of the situation as gleaned from the Task Appraisal, is maintaining a safe psychological climate, while guiding the agenda and pace.

### **Knowledge and Skills required of the SOQ Practitioner**

- Thorough and accurate knowledge of the content of all aspects of the situational outlook questionnaire, the definitions and meaning of climate for creativity and change, the measure's history and development, its validity and reliability and the nature of its application to real situations are an essential baseline qualification.
- The ability to defer judgment, listen to understand and build, and to use collaborative language. In fact, to practice the skills, behaviors and attitudes that successfully establish a climate for change and innovation throughout the debrief itself.
- The skill of managing content and process and holding multiple levels of thought.

- Continuous learning is highly beneficial. Attending climate forums and conferences, reading journal and research articles, and developing mentors in the field are essential to being able to add value as a SOQ practitioner.

## **Summarizing The Result**

This process occurs most predominantly in the Summary section of the agenda. This involves full engagement in the experiential learning model. The experience has been the feedback content. Debriefing requires the skillful use of probing questions to stimulate observations and reactions. Building from the experience, well constructed questions draw out the historical perspective and develops the future perspective.

At this point, the client needs to be summarizing his/her thoughts. The SOQ practitioner is listening carefully for the development of thought and is interjecting questions to help gain breadth and depth from the experience. This is a key step in the learning process. There is a strong linkage back to the goals and objectives of the intervention.

Some potential probing questions include:

What are your observations about the data? What are your feelings about the data? What puzzles you? What stands out as being important? What are some good things that have emerged? What are some opportunities for change that have emerged? What do you think is happening in the workplace that produced this data? What connections can you see between this data and your goal? What connections do you see between this activity and your objectives? What other connections do you see between this activity and other things happening in the workplace? Within your personal life? What are some key learnings from this session so far? What have you learned about yourself? What have you learned about your behaviors and attitude? What have you learned about climate for innovation?

## **Knowledge and Skills required of the SOQ Practitioner**

- Full knowledge of experiential learning methodology including the intent of each phase and the development of learning. Skill at processing individuals through experiential learning.
- Skill at spontaneously interjecting probing questions to elicit richness and depth of information from the client.

## **Extending the Experience**

This primarily involves the Extending section of the agenda. This stage involves summarizing the experience back to the original goals, then generalizing and transferring the future perspective into actionable plans. This may take a significant piece of time and may not be fully explored within the meeting.

It is important to get at least one next step before leaving the meeting. The client should have full ownership of the next steps. The SOQ practitioner is phasing out of the scene unless the client sees a need for their talents. The role is one of interjecting questions that stimulate forward thought and actions. The client will think of more things after the meeting.

#### Some considerations/questions regarding next steps:

What will be the response to the participants? What actions can be taken by the client to strengthen the things that emerged as positive in the data? What actions can be taken by the client to change the things that emerged as critical in the data? What are some other related actions that may be taken? Going back to the goals and objectives of the session, what actions can be taken to further develop solutions? What new problems or issues might emerge as a result of action taken? What are you going to do next? Set a date for a follow-up meeting. This will be a place to explore further thinking, where actions taken can be evaluated and further developed.

#### **Knowledge and Skills required of the SOQ Practitioner**

- Skill at processing divergent thinking.
- Skill at developing logical, step-by-step action plans.

In summary, the role of an SOQ debriefing practitioner is complex and multi-faceted. The implications of these data lead to the understanding that a SOQ practitioner requires a significant level of knowledge and skill in the areas of: task appraisal, experiential learning process and techniques, SOQ theory and measure, interpersonal skills of listening, questioning, probing, closing; other compatible measures, instruments, processes, tools and techniques; writing performance objectives; processing on all levels of Bloom's Taxonomy of cognitive learning; advanced levels of metacognition.

Further expansion on these activities, knowledge and skills are available through CPS-B.