



W-I-S-E
Workforce Integration Support and Education



OSHPD
Office of Statewide Health
Planning and Development



MENTAL HEALTH SERVICES ACT
63
CALIFORNIA
WELLNESS • RECOVERY • RESILIENCE

Managing Up

recognizing your workplace needs
and getting them met

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1

HANDOUTS FOR THIS TRAINING:

1. NVC 4 part process
2. List of needs and feelings
3. Participant exercises (and instructor's version)
4. Core competencies for peer support workers (if peer audience)
5. Sample job announcements (if peer audience)



**Please complete your pre-training
survey and demographic form**



Housekeeping Items

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- Training start/end times
- Break schedule
- Restrooms and emergency exits
- Self-care reminder
- Folder contents

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3

CUSTOMIZE, HIDE, OR OMIT, AS APPROPRIATE

About Me

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- My name
- My role in **W·I·S·E**
- My agency and position
- How long I've been employed at my agency
- Why I work in the mental health field

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4

THIS SLIDE CAN BE CUSTOMIZED

About NorCal MHA

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- Founded in 1946
- Oldest consumer advocacy agency in Northern California
- Peer-run organization that specifically hires people with lived experience

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5

HIDE OR OMIT THIS SLIDE IF GROUP IS ALREADY FAMILIAR WITH NORCAL MHA OR SUBSTITUE THIS SLIDE WITH AN OVERVIEW OF YOUR OWN AGENCY

Peer-Run Org:

Over 50% of our Board

Over 90% of our staff, including all of our managers and Executive Leadership team

Member of CAMHPRO

Work throughout Northern California Have peer employees embedded in Amador County, Placer County, and Sacramento County

Work with many other Counties and CBOs across the state

About W·I·S·E



- **W·I·S·E** stands for Workforce Integration Support and Education
- **W·I·S·E** is a program of NorCal MHA, administered by the Office of Statewide Health Planning and Development (OSHPD), and funded by the California Mental Health Services Act (MHSA/Prop 63), as a component of OSHPD's statewide WET plan

What W-I-S-E Does

W-I-S-E

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- **W-I-S-E** provides **technical assistance** and **training** to help PMHS employers recruit, hire, retain, and support consumer and family member employees
- We focus on genuine workforce integration through the transformation of organizational culture

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7

IF ASKED: Technical Assistance

Organizational assessments - **Assessments look at:**

- Key informant interviews
- Peer staff focus groups
- Self-reported needs
- Workplace culture
- Policies and procedures
- Job descriptions, hiring, onboarding, supervision, evaluation of peer staff
- What's working? What could be improved? What do you need to do your job better?

Identification of strengths and opportunities

Implementation planning

Crafting peer roles and career paths

Supportive coaching and mentoring

Best practices and recommendations

Trainings

Organizational trainings for leaders and management (work culture and managerial competencies)

Professional development trainings for peers (technical and behavioral skills)

Creation of special trainings and educational materials, as needed

About You

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- Your name
- Your job title/position
- Your agency/employer/department
- Why you are interested in this training and what you hope to get out of it

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ASK: Why are you interested in this training and what do you hope to get out of it?

RECORD responses to last question – what attendees hope to get out of this training - on flipchart

Review these training goals at the end of the session to ensure the attendees' needs were met

Today We'll Learn About:

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1. What managing up is and why it's necessary
2. Recognizing feelings and needs at work
3. Barriers to managing up
4. Initiating requests to get your needs met



Managing Up

recognizing your workplace needs
and getting them met



PART 1

WHAT'S "MANAGING UP" AND WHY DO I NEED TO DO IT?

What Do You Think?

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- Can anyone define “managing up”?
- Why might managing up be an important skill to have?

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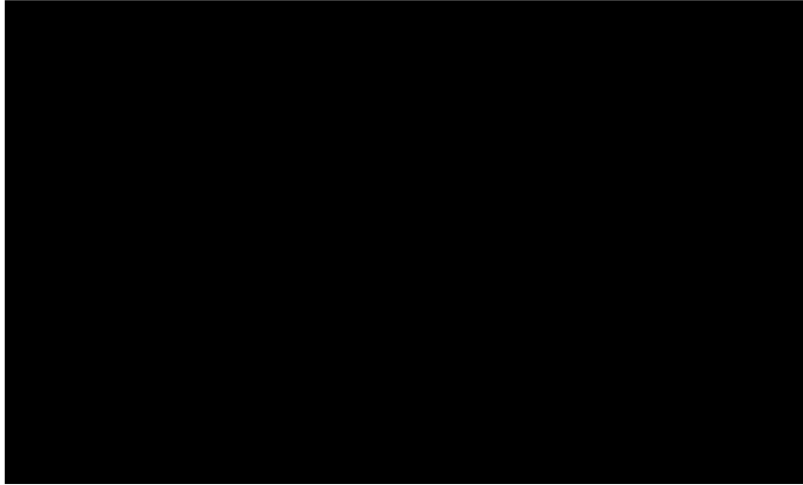
Draw a line down the middle of the flipchart paper, labeling the left side “WHAT?” and the right side “WHY?”

RECORD responses to the two questions on each side of the flipchart

An Expert's Take

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Lauren Mackler is a world-renowned personal and professional coach, psychotherapist, bestselling author, host of the popular LIFE KEYS radio show, and creator of the Illumineering Coaching method, which has helped people around the world to transform their personal and professional lives. Let's hear what she has to say about managing up.

AFTER THE VIDEO, ASK:

1. How does Lauren Mackler define managing up? (Effective Boss Management 101 / How to Manage Your Boss)
2. Why does she think it is important to learn how to manage up? (employee satisfaction and wellbeing, creating opportunities for career growth)
3. What tips does she offer on how to manage up? (Get to know your boss's personality; toot your own horn – subtly)
4. Did anything about this video interest you or surprise you? What?

What's Managing Up?

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*The process of teaching your boss how to manage you;
effectively managing your relationship with your boss*

MANAGING UP IS ...

- Effective boss management
- Getting to know your boss's personality
- Subtly tooting your own horn
- Communicating with your boss in their preferred style
- A way to create future job opportunities
- Owning up to personal mistakes
- Showing you're a team player
- Giving other people credit for their work
- Being assertive, proactive, strategic

MANAGING UP IS NOT ...

- Manipulating your boss
- Kissing up
- Bragging about your accomplishments
- Telling your boss what you think they want to hear
- A way to avoid work
- Blaming others or covering up
- Gossiping, sniping, micro-aggressions
- Taking credit for others' work
- Being sneaky; bossing your boss around

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14

<http://www.eremedia.com/tInt/managing-up-what-the-heck-is-it-and-why-should-you-care/>

SAY: Urbandictionary.com defines managing up as “The process of managing your boss so that you and people who work with/for you can get work done with minimal interference.” While this is a somewhat cynical take on managing up, it is an important component of managing up.

ASK: Can you think of anything else that can be added to these lists?

Why Manage Up?

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- Better employee-supervisor relationships
- Greater job satisfaction/morale
- Avoid burnout/stress
- Personal empowerment
- Job security/advancement
- Effectiveness and efficiency
- Other reasons?

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SAY:

- Good employee-supervisor relationships drive employee satisfaction and engagement, making workers happier and more productive. The number one reason for employee disengagement is a bad relationship with supervisors. Employees usually don't leave jobs – they leave supervisors. This is why good relationships are essential. It takes two people to create positive relationships, so you can start by doing your part to make things work.
- Managing up can help you avoid burnout and stress at work because you know what your boss needs you to do, you can figure out how to do it, and you know how to communicate what you need to get it done.
- You have personal responsibility for your own interpersonal relationships at work, for your own professional development, and for your own work environment. Recall from Recovery 101 that personal responsibility is one of the 10 guiding principles of recovery. Don't wait for your boss to notice what a great job you're doing so you can then collect your prize. When that doesn't happen (and it probably won't), you may get angry, wondering why good work wasn't enough to get ahead. It's better to know now that you need to be proactive if you expect to be rewarded at work. Just as you have learned to advocate for the interests of clients, you need to advocate for yourself at work too.
- You need to show your boss that you are indispensable and worth keeping around when times are tough. You also want to be the first person who comes to mind for a raise, promotion, or other opportunities, like special assignments, new trainings, and professional development to advance your job skills and knowledge. Personal growth and continuous learning is a core competency for peer support workers. Just recovery must be person-driven, no one can drive your career growth or professional advancement but you. We know there is no empowerment without employment, so it's

important to your recovery that you stay working.

- Having a good relationship with your boss means you're a better peer supporter to the people you serve. By figuring out what your boss wants and how they want you to do it, you are not only able to be a more effective employee, you can complete your tasks more efficiently because you're more likely to get them done right the first time. And, when you show you understand your boss's perspective, he/she is more willing to hear your recommendations and suggestions to improve workplace processes, procedures, and outcomes, which also makes things better for clients.

ASK: Can you think of any other reasons why managing up benefits you?

How to Manage Up

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Check your ego at the door!

1. Understand performance expectations
2. Get to know your boss's personality
3. Put yourself in your boss's shoes
4. Make your boss's life easier
5. Toot your own horn

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16

Here are some helpful tips for managing up, which we will cover in detail in the next few slides. Most importantly, you need to develop a thick skin and leave your ego at the door. Managing up requires a lot of empathy – for yourself and for others – which is explained in Part 2 of this training. Because managing up is about getting into other people's heads and anticipating their feelings and needs, you cannot effectively manage up if you are unable to get beyond your own issues.

1. Understand Performance Expectations

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Review:

- Policies and procedures
- Job description and core competencies
- Evaluation criteria
- Past performance evaluations

Initiate:

- Regular check-ins
- Feedback requests

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17

REFER TO HANDOUTS:

1. Core Competencies for Peer Support Workers
2. Sample Job Description(s)

SAY: The foundation of managing up is knowing what is expected of you and how to achieve it. Performance expectations can help you understand how your job fits into the bigger picture:

- How does your job impact your boss, team, division, department, and overall organization?
- How can your position contribute to the mission, vision, and values of your employer?

It is important to not only understand the general expectations for your job, but also how your boss interprets these expectations. **For example:**

All staff on your team are required to submit monthly reports on certain aspects of their jobs (e.g., number of clients served; number of referrals made; etc.). The deadline for your boss to submit these reports to her boss is the 15th of the following month. Your boss wants you to submit your reports to her by the 5th of the month so she has time to review and edit them before submitting the final version to her boss. Your boss may also ask you to report on specific information – like the age, gender, and primary language of each client – that her boss doesn't ask for because she thinks it is important to measure this information. Your team's internal deadline and additional reporting requirements reflect your boss's interpretations and preferences for this basic job duty.

Review

Several sources should be readily available to help you determine what your boss expects of you. In reviewing these sources, be honest with yourself in determining whether you are meeting expectations. If you think you might be falling short, don't panic! Taking initiative to improve your performance is a sign of strength, not weakness, and demonstrates to your boss that you really care about your job and how your performance impacts the bigger picture.

1. **Organizational rules, policies, and procedures** are usually found in the employee handbook. Make sure you are complying with general rules such as punctuality and attendance, reporting requirements, and basic codes of conduct.
2. **Job descriptions** detail your essential job duties. **Core competencies** are the basic skills and abilities you need to do your job effectively. They define the ways in which you are expected to perform your job duties and are often included in your job description. In reviewing your job description and the core competencies for your position, ask yourself:
 - A. Are you familiar with all your job duties? None of your them should surprise you. Even if you perform some tasks more than others, you should at least know how to do everything listed in your job description.
 - B. Do you understand the core competencies for your job? Are you regularly demonstrating this basic skill set in your job performance?
 - C. Are you performing your job duties to the level of quality expected? Do you have the skills and abilities to perform your job properly? If not – or if you’re unsure – it’s time to have a conversation with your boss. They can explain their expectations and how to accomplish them. You can work together to identify ways to improve the quality of your performance, if necessary.
3. **Evaluation criteria** – the way your performance is measured – is a clear source of expectations. If you are a new employee or have never received an evaluation, ask you boss for a blank copy of the evaluation template for your job. This will tell you how your boss will measure your performance when you do receive a review.
4. **Past performance evaluations** - assuming you’ve received them - will offer reminders of you where you are meeting expectations and where you have room for improvement. If you have improved your performance in the areas your boss previously identified, use this as an opportunity to “toot your own horn,” as explained in slide #22.

Initiate

Even if you are pretty sure how your performance measures up and where you may need to concentrate your efforts – and especially if you are not – it is important to take the lead by initiating conversations with your boss about your performance. Most bosses are busy dealing with multiple pressures on their time. They may not always have the opportunity to schedule a performance meeting with you, so you must be proactive. This shows your boss you really care about your performance and want to be the best employee you can be. While you may not see any immediate rewards, it will pay off in the long run by keeping you at the top of you boss’s mind for new opportunities and will ensure you have the necessary information and support to be a top performer (which may earn you raises and promotions in the future).

1. **Regular Check-Ins:** Request brief (15 minutes is enough) check-ins on a regular basis (monthly if you are a new employee or new to the team; quarterly if you’ve been around awhile) to find out how you are measuring up.
2. **Feedback Requests:** Ask your boss for feedback on a particular assignment or on an area of performance you’ve been working on.

2. Get to Know Your Boss's Personality



WHAT'S MY BOSS LIKE?

Short, sweet, and to the point	Details, details, details
Laid back/casual	Proper/professional
Outgoing/speaks up	Quiet/reserved
Communicates in person or by phone	Communicates via email, text, or IM
Tolerates mistakes	Risk-averse
Enjoys humor/makes jokes	Serious
Short-tempered	Patient
Initiates conversation	Waits for others to initiate
Direct/blunt	Indirect/beats around the bush
Confrontational	Avoidant
Distracted	Focused
Big picture	Majors in the minors

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18

These are just some personality traits that we see in managers, and sometimes bosses can be right in the middle or on either end of the spectrum, depending on the circumstances.

ASK:

- Why is it important to figure out your boss's personality?
- What other personality traits can you think of that may be important to consider?

3. Put Yourself in Your Boss's Shoes



- How might my boss feel?
- What might my boss need?
- What does my boss care about?
- What's the bigger picture?
- What interests may be competing?
- What are the impacts on my boss?
(or team, program, organization)



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SAY:

We learned about empathy in Recovery 101 and why it is so important to building and maintaining positive relationships. Your relationship with your boss is no different. If you want your boss to empathize with you, you can start by empathizing with your boss by putting yourself in your boss's shoes before acting or reacting. We will talk about how to recognize your boss's feelings and potential needs later in this training.

ASK:

Why is putting yourself in your boss's shoes necessary to managing up?
What are some things your boss cares about that may impact how you do your job?

4. Make Your Boss's Life Easier

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... or at least not harder!

- Anticipate what needs to be done
- Step up without being asked
- Be collaborative
- Make your boss look good
- Take personal responsibility
- Propose solutions
- Ask if you're unsure

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SAY: Making your boss's life easier comes naturally when you understand your job duties, have the necessary skills to do your job well, know your boss's personality, and can put yourself in their shoes.

Ask if you're unsure – don't assume! Here are some things you need to ask about if you don't already know:

What's the intended outcome?

What do I need to do?

How do I need to do it?

Why is it done this way?

What information may I be missing?

How would a seasoned coworker handle it?

What is the official policy or procedure?

5. Toot Your Own Horn

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- Timing and setting are important
- Track your accomplishments
- Tell/remind your boss what you do well
- Ask for more responsibility

But ...

- Don't brag, hog the spotlight, or take credit for others' work!

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21

Recall from the video that tooting your own horn is an effective tool for managing up. However, if you don't do it correctly, tooting your own horn can backfire.

Tooting your own horn can feel awkward for some people, especially those of us in helping professions that usually focus on others and not ourselves. However, if done right, tooting your own horn can feel natural, helping to remind others you are a team player and care about your coworkers, the clients you serve, and the agency you work for. It doesn't have to feel like bragging. The key is finding ways to do it that are appropriate for the situation and fit your own personality.

ASK:

1. How can tooting your own horn be misperceived? What can go wrong?
2. What are some ways you can effectively toot your own horn in your workplace? What opportunities do you have to do this?

What Do You Think?

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- What are some ways you can use these managing up tips in your workplace?

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Engage in a 2-3 minute popcorn-style discussion with participants



PART 2

WORKPLACE NEEDS

Managing Up = Recognizing Needs

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Managing up means developing a relationship with your boss that:

- Fits **both** your needs and styles
- Is shaped by **mutual** expectations
- Is based on dependability and honesty

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Essential to managing up is recognizing needs: yours and your boss's.

This recognition is the first step in building a positive relationship with your boss. By determining what your own needs are and strategizing how to get them met in a way that also meets your boss's needs, you will become more empowered, engaged, and make a bigger impact in your workplace.

Why Needs Matter

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- The Golden Rule
- The Platinum Rule
- The Double Platinum Rule

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SAY: We have all heard of the Golden Rule, right? Can anyone give a definition of this rule or say how it goes?

“Treat others the way YOU want to be treated”

While the Golden Rule is a good baseline to have when developing empathy for others, it only works when other people want to be treated the way YOU want to be treated. To put it another way...treating people the way you want to be treated only works when other people want to be treated that way. Otherwise, you may end up turning people off.

The Platinum Rule

Now who here has heard of the Platinum Rule? Does anyone know what it means?

“Treat others the way THEY want to be treated”

This rule means that you recognize that interpersonal relationships are not just about what you want to give; it's about what others want to receive. If you give me what I don't want, then you haven't increased your value in my eyes. There must be a deliberate effort to uncover what the other person wants, needs, and desires in order to take the guess work out of the equation.

So what is the Double Platinum Rule?

“Treat others the way they don't even know they want to be treated.”

ASK: Has anyone ever surprised you by doing something for you or getting something for you before you even realized you wanted or needed it? When someone who goes above and beyond when you weren't expecting it? Can anyone share an example from your life when someone has demonstrated the Double

Platinum Rule with you?

On the flip side, maybe YOU anticipate a way to help others in a way that is truly meaningful to them. The Double Platinum Rule should not be confused with thinking you know what's best for other people or imposing your personal values on them. This can come off as parental or condescending, not helpful. It is being truly motivated by knowing what makes the other person tick and finding a way to make their life a little easier without first being asked.

This requires us to really understand what motivates people and really get to know them so we can add the most value to the relationship. To boil it down...anticipate, anticipate, anticipate. Don't just meet the other person's expectations, EXCEED them.

Here's an example:

A man went out to his car only to find that the front right tire was stolen...completely gone! So after storming around upset for a few minutes, he put on the spare wheel, and drove to the nearby auto store. After explaining to the attendant that his wheel was stolen, he proceeded to order a new wheel. The attendant obliged told the man that the wheel would arrive by the following day. Great! As he was leaving the store, the manager stopped him to ask if he got everything I wanted. After telling him yes, the man briefly explained his wheel mishap from that morning. The manager then asked in a verifying manner, "So you also ordered the wheel locks, right?" Up to that point, the man had never heard of a wheel lock. The manager told him that it prevents tires from being stolen, and he should consider ordering some. So the man went back to the attendant that he placed the tire order with, and asked why he didn't recommend the wheel locks...especially after the man told him that his wheel was stolen. The attendant then looked the man in the eyes and said, "I was doing my job and giving you what YOU wanted!"

So here, while the attendant exercised the Platinum Rule (giving the customer exactly what he wanted – a new wheel), the manager was demonstrating the Double Platinum Rule by offering the customer a way to prevent the same problem from ever happening again. He didn't know the customer, but he could make an educated guess, based on the customer's own unique circumstances, a resource that perfectly met his needs.

http://www.hotel-online.com/News/PR2007_2nd/Jun07_GoldenRule.html

We All Have Needs ...

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Basic desires, expectations, hopes, and values common to every human being:

Connection	Meaning	Physical Wellbeing	Peace	Autonomy	Play	Honesty
Acceptance	Challenge	Air	Communion	Choice	Celebration	Authenticity
Appreciation	Clarity	Comfort	Ease	Freedom	Joy	Integrity
Belonging	Competence	Food/water	Equality	Independence	Humor	Sincerity
Cooperation	Contribution	Health	Fairness	Space	Mourning	
Communication	Creativity	Light	Harmony			
Community	Discovery	Movement	Inspiration			
Consistency	Effectiveness	Quiet	Order			
Empathy	Efficiency	Rest	Predictability			
Inclusion	Growth	Safety				
Mutuality	Hope	Shelter				
Recognition	Learning					
Respect	Passion					
Security	Purpose					
Stability	Self-expression					
Support	Stimulation					
Understanding	To matter					
Trust	Understanding					

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26

HANDOUT: Refer to list of needs at work

SAY: So how can we learn to form relationships with our bosses that meet both our needs? How can we exercise the Double Platinum Rule at work if we don't even know what needs are?

This list is not exhaustive and there are probably some that are not on this list. But these are some basic human needs and deeply-held personal values that come into play in our working environments. We'll talk about needs more in the next few slides.

http://www.workplacestrategiesformentalhealth.com/mmhm/exercises/3__UnderstandingBasicHumanNeedsjun122011JFMAB.pdf

Workplace Needs

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Appreciation	Belonging	Celebration	Choice
Contribution	Enjoyment	Fairness	Flexibility
Integrity	Mourning	Purpose	Recognition
Respect	Physical Safety	Psychological Safety	Support

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27

SAY: Some of the needs identified on the previous slide deeply connected to our workplace experiences. These particular needs are most commonly met or unmet by the work we do and our working environments.

(Quickly read off the needs listed on this slide. If asked – or to enhance your presentation – explain some or all of these needs.)

- Appreciation for the work we do and how we do it
- A sense of belonging and interpersonal connection with others
- Celebration of accomplishments
- Contribution to something that benefits others or is bigger than yourself
- Having a level of **choice** as to how you will do your job (not necessarily what or when)
- A level of **enjoyment** while working
- Fairness and equity in decision-making
- Flexibility to modify your work environment to optimize your productivity
- Ensuring that your roles and activities at work do not violate your personal **integrity**
- Mourning mistakes, regrets, and/or the departure of coworkers (mourning = processing a loss)
- A sense of **purpose** – a reason to get up in the morning and feeling that you do something well
- Recognition for success and effort at work

- Respect for the work you do and the contributions you make
- Physically **safe** and healthy work environment
- Psychologically safe and healthy work environment
- Support from a community of coworkers and peers

Why Do We Work?

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There is no empowerment without employment

Working supports recovery by providing:

- Routine
- Activity
- Identity
- Purpose
- Contribution
- Connection
- Social Support
- Resources
- Independence

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28

SAY: Employment is an important social determinant of health and participation in employment can enhance health and wellbeing. Unfortunately, the majority of individuals with serious mental health conditions are unemployed.

Unemployment rates among people with serious mental health challenges range between 80% and 90%, making this group one of the most recipients of social security the United States. This is unfortunate because most people living with a diagnosis desire and can work, but they are excluded from the workforce because of stigma. For those with mental health conditions who are in the workforce, there are issues related to sustaining their capacity for productive work.

<http://www.hindawi.com/journals/aph/2014/258614/>

SAY: Work is a key factor in gaining and maintaining recovery, and in preventing episodes of unwellness.

Routine

It provides us with a reason to get up in the morning. Now sometimes we may not wish we didn't have to work, but actually, this routine keeps us healthy.

Activity

Work gives us something to do each day. The very act of saying to one's self: "I have something to do today" protects our mental health.

Purpose, Contribution

Our work may also be something that meets our needs for purpose and contribution. These are protective factors for mental health.

Connection and Social Support

We spend more daylight hours with the people we work with than those we live with. We are social animals who connect to each other and when we are away from work, we miss the social interaction. When people are away from work, they are socially isolated. Isolation is both a predictor and risk factor for mental illness.

Identity

I could ask each one of you what you do and you would answer without thinking, either your title or what you do. If you are off work, say for a year or more, and someone asks you, "So what do you do?" you find it difficult to answer, difficult to define yourself to the other person in terms that are true... by society's values and standards, you are a nothing because you are not "doing" something.

Resources, Independence

Maintaining gainful employment allows people to get off disability and provide for themselves financially, allowing them to become independent and fully participate in society. In addition to financial resources, it provides individuals with important skills and access to information, both of which can be used to improve their own lives. In building healthy relationships, working allows people to build social capital as well, giving them access to opportunities they may not have had before.



SAY: Put a different way, the needs that are met from working all directly support a life in recovery. Recall from Recovery 101 and SAMHSA's working definition of recovery that four major dimensions contribute to and support a life in recovery. These are:

- Health (not just mental health)
- Home
- Purpose
- Community

Because health is only 25% of the picture, this definition of recovery includes psychosocial factors that contribute to personal wellbeing. Therefore, healthy and supportive interpersonal relationships with coworkers and the self-esteem boost that working provides have a significant role to play in a person's recovery.

What Do You Think?

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- What personal needs of yours are met by working?
- How has working contributed to your recovery?

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30

HANDOUT: As participants to refer to list of needs at work.

RECORD: responses to the first question on flipchart under heading “MY NEEDS”

Engage in a 2-3 minute popcorn-style discussion with participants around second question

Recognizing Needs

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SAY:

- **Behavior** is what we do or what we see others doing, and how it is done. It is what we see on the surface and is often informed by or interpreted through our own feelings and perceptions.
- **Feelings** are what motivate our own behavior or guide our interpretations of others' behavior.
- **Needs** are based on how we view ourselves and the kind of world we want to live in and drive our feelings. Needs are more than mere preferences – they are based on our personal values.

SAY: With NVC, we look at behavior as a means people use to get needs met, and sometimes the behaviors used to meet one need create additional unmet needs in the process.

Nonviolent Communication

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- Strategic framework for getting needs met
- Recognizes needs and related feelings to overcome negative behaviors, criticism, and judgment

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32

NVC is used to identify our personal needs and those of others and how to find effective strategies of getting these needs met.

The premise of NVC is that when you focus on connection with yourself and others, you will be meeting your needs while, at the same time, others in your world are meeting their needs. We often believe that if we can analyze a situation properly, then we will get what we want. NVC suggests instead that when we are connected to needs, all of us can be in the process of meeting our needs.

NVC is simple, but not easy. In the beginning, it is particularly difficult to remember these new concepts and methods of viewing interpersonal relationships. NVC is both a different consciousness—a way of thinking about and approaching our communication with others—and a set of skills, so at first there is much “unlearning” of our existing socialization that happens as we begin to use NVC in our daily lives.

Excerpt From: Ike Lasater & Julie Stiles. “Words That Work in Business.” iBooks.
<https://itun.es/us/5Lxwy.l>

Benefits of NVC:

- Personal growth
- Conflict resolution
- Enhanced organizational effectiveness

Improved interpersonal relationships

How NVC Works

W·I·S·E

Workforce Integration Support and Education



1. Honest expression

- **My own feelings and needs**
- What I want, without using blame, criticism, or demands

2. Empathetically receiving

- Others' feelings and needs
- What they want, without hearing blame, criticism, or demands

Empathy – for ourselves and for others – is a key component of NVC.

Strategic Framework

W·I·S·E

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Observations

- Objectively describing what is going on without using evaluation, moralistic judgment, interpretation or diagnosis

Feelings

- Saying how you feel about what you have observed without assigning blame

Needs

- Expressing the basic needs that are or not being met and are the source of feelings

Requests

- Making clear requests for actions that can meet needs

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SAY: Here's a quick overview of NVC's strategic framework. In the next section of this training, we will learn how to apply this framework in recognizing our own feelings and needs – as well as our boss's feelings and needs - to make requests and get these needs met.

Don't Judge Too Quickly

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5 minutes

SAY: The first step in applying NVC is to observe facts without analyzing, interpreting or judging what you are seeing.

The scenarios in this video offer humorous illustrations of what can go wrong when rush to judgment about what we are observing before we know the whole story.

PLAY THE VIDEO

Observation Without Judgment

W·I·S·E

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Separate facts from your interpretation of them

When you are:

- Defending
- Explaining
- Diagnosing
- Analyzing
- Blaming
- Criticizing
- Justifying
- Praising
- Complimenting

you are not observing – you are judging!

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SAY: The first component of NVC is observation without judgment - separating what we see from our evaluation of what we are seeing. It is difficult to make observations, especially of people and their behavior, that are free of judgment, criticism, or other forms of analysis. When we combine observation with evaluation, others are apt to hear criticism and resist what we are saying.

For example, rather than saying Jim barged in and rudely interrupted the meeting (an interpretation of a series of facts), you might instead describe the situation as follows:

- Jim forcefully opened the door to the conference room
- When the door opened, it hit the wall behind it
- Jim walked through the door rapidly and did not guide its closure
- The heavy door made a slamming sound when it closed
- Jim quickly approached the table where the meeting was taking place
- Jim's corduroy pants made an audible swishing sound as he walked up to the table
- Jim dropped his notepad onto the table, which made a slapping sound when it landed
- Upon hearing Jim's notebook make contact with the table, four of the meeting's seven participants turned to look at Jim
- While Linda was speaking, Jim asked the meeting chair "what agenda item are we on?" in a loud voice

This is observing facts without drawing conclusions about what the facts mean or judging a person's behavior.

The key to observing without judgment is noticing the times when you are feeling less connected to someone. What are they doing or saying? Be specific and remove any interpretation or analysis when describing their behaviors. Think of other possible explanations for the behaviors you are seeing and keep in mind your interpretation may not be the only way to view the situation.

Also, beware of words like always, never, ever, whenever, frequently, often, rarely, and seldom, which tend to confuse observation with evaluation.



Exercise 1: Observation or Evaluation?

- Circle the number of each statement that you believe is an observation alone, without any evaluation involved

10-12 minutes

HANDOUT: Refer to the handout for Exercise 1: Observation or Evaluation?

Review the table on the handout for Exercise 1. Read each example aloud and address any questions as they arise.

ACTIVITY: Working in groups of 2 or 3, complete Exercise 1, circling the number of each statement that you believe is an observation alone, without any evaluation involved. Give the group 5-7 minutes to complete the exercise. Then go over the answers as described in the Instructor's Guide.

Recognizing Feelings

W·I·S·E

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Feelings When Needs Are Met	Feelings When Needs Are Unmet
Comfortable	Afraid
Confident	Angry
Engaged	Annoyed
Excited	Aversion
Exhilarated	Confused
Friendly	Disconnected
Grateful	Disconcerted
Hopeful	Embarrassed
Inspired	Fatigued
Joyful	Sad
Peaceful	Tense
Pleased	Vulnerable
Refreshed	Yearning

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38

HANDOUT: Refer to list of on feelings at work

SAY: The second component of NVC is to recognize and express what we are feeling.

- Workplace notions of professionalism discourage us from expressing emotions, making it difficult to identify and talk about feelings.
- We are conditioned to associate emotions and feelings with vulnerability.
- However, expressing our vulnerability can actually help us avoid and resolve conflicts.

We all have feelings, and our own emotions can be impacted significantly by the emotions of others we encounter. Emotional states are “contagious”: we can take on what other people around us are feeling, often without even realizing what happened. At work, this means that strongly positive or strongly negative emotions can lift or lower the energy of the entire team.

What others say and do may be the stimulus, but never the cause, of our feelings. Our feelings result from how we choose to receive what others say and do, as well as from our particular needs and expectations in that moment. But knowing our feelings and what triggers them helps us make informed choices and empowers us to take control of our circumstances. It is therefore a sign of maturity – not weakness – to recognize our feelings and understand their sources, which are nothing more than our own met or unmet needs.



Exercise 2: Expressing Feelings

- Circle the number in front of each statement in which the speaker's actual feelings (not evaluations) are verbally expressed
- **Hint:** Refer to your list of feelings at work for guidance

10-12 minutes

HANDOUT: Refer to the handout for Exercise 2: Expressing Feelings

Review the tables on the handout for Exercise 2. Read each example aloud and address any questions as they arise.

ACTIVITY: Working in groups of 2 or 3, complete Exercise 2, circling the number of each statement that you believe is an expression of a feeling, not a thought, judgment, or opinion.

Give the group 5-7 minutes to complete the exercise. Then go over the answers as described in the Instructor's Guide.

Recognizing Needs

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Connection	Meaning	Physical Wellbeing	Peace	Autonomy	Play	Honesty
Acceptance	Challenge	Air	Communion	Choice	Celebration	Authenticity
Appreciation	Clarity	Comfort	Ease	Freedom	Joy	Integrity
Belonging	Competence	Food/water	Equality	Independence	Humor	Sincerity
Cooperation	Contribution	Health	Fairness	Space	Mourning	
Communication	Creativity	Light	Harmony			
Community	Discovery	Movement	Inspiration			
Consistency	Effectiveness	Quiet	Order			
Empathy	Efficiency	Rest	Predictability			
Inclusion	Growth	Safety				
Mutuality	Hope	Shelter				
Recognition	Learning					
Respect	Passion					
Security	Purpose					
Stability	Self-expression					
Support	Stimulation					
Understanding	To matter					
Trust	Understanding					

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HANDOUT: Refer to list of needs at work

SAY: This list is not exhaustive and there are probably some workplace needs that are not on this list. But these are some basic human needs and deeply-held personal values that come into play in our working environments.

SAY: If we express our needs, we have a better chance of getting them met. Unfortunately, most of us have never been taught to think in terms of needs. We are accustomed to thinking about what's wrong with other people when our needs aren't being fulfilled. Judgments of others are alienated expressions of our own unmet needs.

When we express our needs indirectly through the use of evaluations, interpretations, and images, others are likely to hear criticism. And when people hear anything that sounds like criticism, they tend to invest their energy in self-defense or counterattack. If we wish for a compassionate response from others, it is self-defeating to express our needs by interpreting or diagnosing their behavior. Instead, the more directly we can connect our feelings to our own needs, the easier it is for others to respond to us compassionately.

http://www.workplacestrategiesformentalhealth.com/mmhm/exercises/3__UnderstandingBasicHumanNeedsjun122011JFMAB.pdf



Exercise 3: Acknowledging Needs

- Circle the number in front of each statement where the speaker is acknowledging responsibility for their feelings
- **Hint:** The speaker should connect their feeling with a personal need, value, or desire. For example: *"I feel [x], because I want/need/value [Y]"*

10-12 minutes

HANDOUT: Refer to the handout for Exercise 3: Acknowledging Needs.

Review the tables on the handout for Exercise 3. Read each example aloud and address any questions as they arise.

ACTIVITY: Working in groups of 2 or 3, complete Exercise 3, circling the number of each statement that you believe is an expression of a specific need.

Give the group 5-7 minutes to complete the exercise. Then go over the answers as described in the Instructor's Guide.

What Do You Think?

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- Why do we have a difficult time identifying others' unmet needs based on their words and behaviors?

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Engage in a 2-3 minute popcorn-style discussion with participants



PART 3

MANAGING UP: THE BARRIERS

Common Challenges

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1. Difficult situations
2. Strained relationships
3. Fear of vulnerability

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These are some common challenges to managing up. Many times people just don't know where to begin, especially if they have had negative experiences in the past when trying to communicate their needs to their boss.

In this section, we will discuss all of these barriers and give you some tips to deal with each of them.

1. Difficult Situations

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- New boss
- Hands-off boss
- Insecure boss
- Avoidant boss
- Ineffective boss

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Sometimes we struggle to connect with our boss. We may interpret their actions in ways that impact us negatively. We may attribute attitudes and motives to our boss based on their behaviors.



THE NEW BOSS



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The New Boss

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Characteristics:

- Recently promoted or assigned to your team
- Wants to make big changes; “shake things up”
- Still figuring things out
- Doesn’t know who to trust yet
- Lacks context/historical information
- Focused on building relationships and reputation with colleagues and superiors

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HANDOUT: MHW list of feelings and needs at work

ASK:

- Turning back to the NVC skills we learned in Part 2, what are some feelings the new boss might have in this situation?
- What unmet needs might he/she have?

The New Boss: Quick Tips

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Do figure out:

- What they were promoted or hired to do
- Who your boss answers to
- What assets you bring to the table
- How they will measure your performance

Don't:

- Push your personal agenda
- Badmouth your coworkers or former boss

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ASK: Do you have any other tips for dealing with the type of boss in this scenario?



THE HANDS-OFF BOSS



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The Hands-Off Boss

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Characteristics:

- Works remotely – either from home, in another office, or behind a closed door
- Looks at the big picture, not the fine print
- Rarely communicates or follows up
- Delegates and lets employees handle the rest
- May seem busy, disengaged, or disinterested

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HANDOUT: MHW list of feelings and needs at work

ASK:

- Turning back to the NVC skills we learned in Part 2, what are some feelings the hands-off boss might have in this situation?
- What unmet needs might he/she have?

The Hands-Off Boss: Quick Tips

W·I·S·E

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Do:

- Be compassionate and offer help
- Engage them; initiate contact
- Appreciate the autonomy

Don't:

- Expect them to communicate more
- Resent them or write them off as useless
- Withhold important information

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ASK: Do you have any other tips for dealing with the type of boss in this scenario?



THE INSECURE BOSS



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The Insecure Boss

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Characteristics:

- Avoids feedback (especially negative)
- Doesn't welcome employees' opinions
- Discourages staff from speaking up
- Inhibits talented employees and good ideas
- Micromanaging and controlling

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HANDOUT: MHW list of feelings and needs at work

ASK:

- Turning back to the NVC skills we learned in Part 2, what are some feelings the insecure boss might have in this situation?
- What unmet needs might he/she have?

The Insecure Boss: Quick Tips

W·I·S·E

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Do:

- Understand the root cause
- Increase trust; be transparent
- Use “sandwich” method for constructive criticism

Don't:

- Criticize your boss or their work in front of others
- Be too direct – choose your words carefully
- Push back or be passively aggressive

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Understand the root cause.

All controlling bosses are not the same. On one end of the spectrum are managers with very high standards. They may regularly have you rework something that doesn't measure up. They pay a great deal of attention to detail and exercise some degree of control, but they don't stifle you. In fact, you may learn a lot from them.

At the other end of the spectrum are micromanagers who give you little to no independence, insist on being involved in every detail of your work, and are more concerned about specifics, such as font size, than the big picture.

Many pressures – such as incomplete goals or unfinished projects — might be the cause of the boss's anxiety. Make sure you aren't feeding your boss's insecurity by acting too aggressively. If you approach him or her collaboratively, you might just get better results.

Be more transparent.

Self-doubting managers fear the unknown and assume the unintended. Trust, the only antidote, is built by transparency. Even if it takes more time and effort, share as much information as possible.

Focus on their strengths when offering your opinion and use the “sandwich” method – put the critical information between two positives.

ASK: Do you have any other tips for dealing with the type of boss in this scenario?



THE AVOIDANT BOSS



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The Avoidant Boss

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Characteristics:

- Avoids conflict
- Indecisive; delays decision making
- Fears uncertainty
- Prefers status quo
- Resists change
- Doesn't advocate for staff

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HANDOUT: MHW list of feelings and needs at work

ASK:

- Turning back to the NVC skills we learned in Part 2, what are some feelings the indecisive boss might have in this situation?
- What unmet needs might he/she have?

The Avoidant Boss: Quick Tips

W·I·S·E

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Do:

- Ask questions rather than seek decisions
- Focus on the first step
- Build trust
- Gather evidence

Don't:

- Go over their head or behind their back
- Rush them or pressure them to take action

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Ask Questions/Define before deciding.

Instead of seeking a decision, involve the indecisive leader in defining the problem. One sure way to get closer to a decision is to ask a lot of questions. That will open new windows of information, and your manager will become more comfortable about making a decision.

Focus on the first step.

Big decisions can be broken down into small ones. All you need is for your manager to make one small decision that enables you to take the first step; then the next one, and so on.

Build trust.

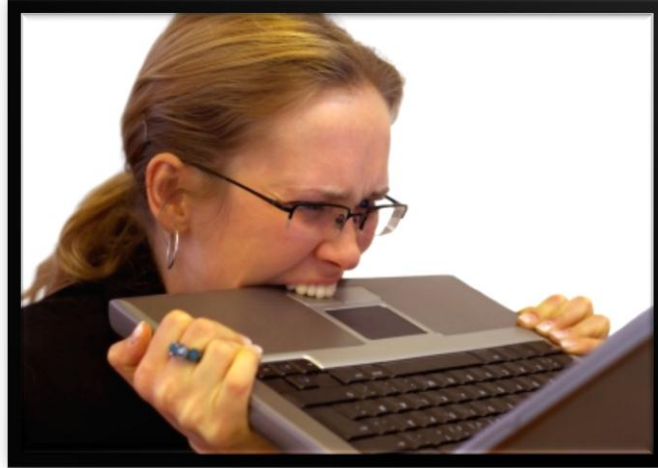
Vacillating managers look for peers they can talk to before they make up their minds. Become the person your manager trusts; you can then help make decisions quickly.

Gather evidence/Have a conversation.

If you want your boss to use her authority on your behalf, give her everything she needs to build her case: assemble data, write drafts, zero in on how your request fits into larger unit or organizational goals. Get together as a team and have a candid, unscheduled discussion with your manager about the way his or her behavior is affecting productivity and morale. Be honest, but respectful. When indecisive managers are confronted by a few determined souls, they tend to make decisions immediately.



THE INEFFECTIVE BOSS



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The Ineffective Boss

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Characteristics:

- Pushed into responsibilities they can't handle
- Promoted for the wrong reasons
- Lacks technical or managerial ability
- Doesn't clearly communicate goals or expectations

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HANDOUT: MHW list of feelings and needs at work

ASK:

- Turning back to the NVC skills we learned in Part 2, what are some feelings the ineffective boss might have in this situation?
- What unmet needs might he/she have?

The Ineffective Boss: Quick Tips

W·I·S·E

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Do:

- Understand your boss's shortcomings
- Ask others for help
- Step up
- Engage in self-care

Don't:

- Demonize them
- Complain to others in your workplace
- Sabotage them or set them up to fail

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SAY: Regardless of your boss's incompetence, you need to work together to get your job done.

Understand your boss's shortcomings

Many of us have blind spots when it comes to our bosses. Ask yourself if you're jealous of her position in the organization or if you have a natural tendency to resist authority. Be cautious about your judgment until you collect all the evidence. Your boss may have stressors you don't see or fully understand. By learning more about your boss and developing empathy for him, you may reevaluate his competence. Even if you still conclude that he's incapable, remember that he's human. Don't demonize him.

Ask Others for Help

Look to peers or people outside the organization for advice and a place to vent. Find confidants: a trusted colleague, a spouse, a mentor, or a coach. Explain what you're seeing, how it's affecting you and your work, and ask for advice. People outside the situation can give you a fresh perspective or offer new coping strategies.

Step Up

Rather than give up, focus on what you can do to make up the difference. If your boss fails to set priorities for the team, propose some that he can then approve or tweak. If meeting follow-up isn't his strength, offer to send out the to-dos. Without harboring resentment, do what's best for your team and the organization. Recognize that stepping up can be a growth opportunity; you may be taking on responsibilities someone at your level doesn't usually have. And in the process, you gain the respect and appreciation of other higher-ups.

Be creative in collaborating with your boss. Figure out where she excels and then find ways to pair your strengths with her weaknesses. When you request something from her, be specific about what you need. And do as much of the work for her as you can: Provide a draft e-mail or point out the three areas you'd

like her to comment on. If she's unable to help, suggest an alternative: Perhaps you can ask one of her peers or superiors for input or the introduction. Your goal is to help her solve the problem, not set up more situations where she'll fail.

Develop Yourself

Write your own goals for the quarter or year. Send them to your boss and ask to review them together. In person, you can then confirm your priorities and understand her expectations. If she's still unresponsive, keep a record of what you've proposed and work to meet the goals you laid out. It may be that she isn't sure what you should be working on and needs you to just take action.

Take Care of Yourself

We have a tendency to point to a bad boss and say, "He's ruining my life." But this ignores the fact that you have agency in the situation. Once you become a victim, you cease to become a leader. Focus on what makes you happy about your job, not miserable. We can come to work every day and pay attention to this horrible boss, or we can choose to pay attention to the people we are happy to see every day and the work we enjoy.

2. Strained Relationships

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- Resentment
- Misunderstandings
- Different values
- Different communication styles

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Any of the difficult situations we have just reviewed can result in strained relationships with your boss.

Resentment: Without having tools or outlets to deal with the frustrations arising from these situations, we can begin to feel resentful of our boss because our needs are not getting met.

Misunderstandings: When we are unable to empathize with our boss or they are unable to empathize with us, misunderstandings can result. We don't get one another's motives or objective because we have difficulty making them clear to each other. We can then rely on mental short cuts or generalizations to write off our boss as insensitive, uncaring, detached, or unhelpful because we are misinterpreting their behavior or don't understand what else might be going on with them.

Different Values and Communication Styles

Do you and your boss come from different cultures?

Be aware that cultures differ in their expectations and treatment of people with authority. In some, the boss is expected to be participative; in others, directive. In some, proactive and assertive; in others, humble and modest. Compare the characteristics of both your cultures. Where your assumptions and expectations differ, be prepared to talk about them explicitly.

Ask Yourself:

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- Are you meeting your boss's expectations?
- Have you established trust with your boss?
- Do you understand your boss?
- Are you making your needs clear?

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Meeting Expectations

Producing required outcomes/results

Sharing important information

Demonstrating support and loyalty

Establishing Trust

Viewing important issues the same way

Agreeing on the "right thing to do"

Communicating when challenges arise

Taking personal responsibility

Mutual Understanding

Seeing your boss as a person

- Goals, strengths, weaknesses
- Background and experience
- Personal life, values
- Culture

Knowing your boss's management style

- Goals, plans, and pressures
- How your boss makes decisions
- How they prefer to work
- Does your boss give guidance or answers?
- Do you approach them with questions or propose solutions?

Recognizing your boss's strengths

- They do exist – they’re the boss for a reason!
- Leverage your boss’s strengths; you have to know them to do this

Clarifying Your Needs

Ironically, although we think our managers hold all the power, bosses often feel powerless in hearing people “complain” without knowing what they can do to produce a satisfying outcome for all involved. Since employees seldom make requests to meet their needs, managers are left to figure out what they imagine might be the other person’s requests and needs. These are rarely as clear to the boss as the employees think they should be.

3. Fear of Vulnerability

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- Hierarchies
- Authority figures
- Power imbalances
- Negative past experiences

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SAY: Because we are called to reveal our deepest feelings and needs, we may sometimes find it challenging to express ourselves in NVC.

The situations where we are the most reluctant to express vulnerability are often those where we want to maintain a “tough image” for fear of losing authority or control.

It’s harder to empathize with those who appear to possess more power, status, or resources.

When we work in a hierarchically structured institution, there is a tendency to hear commands and judgments from those higher up in the hierarchy. This may be especially true if we have had negative past experiences with coercive authority figures.

People often perceive that a person has power over them and that therefore they cannot make a request for a change, and do not actually check that assumption. Needs for safety and security of livelihood get in the way of approaching a person who is perceived to hold power. Nonetheless, it becomes self-defeating to feel your needs are not being met, yet not reveal those needs and make a request that you think would meet them.

A layer of difficulty is added when, for instance, we need to give feedback about something we don’t like to a person whose decisions can adversely affect our continued employment.

However, the more we empathize with the other party, the safer we feel.

If I have an image that I’m being humiliated and taken advantage of, I may feel too wounded, angry, or scared to be able to empathize. At such a moment, I might feel angry and defensive or avoidant, neither of which is effective in getting my needs met.

Self-expression becomes easier, however, after we empathize with others, because we will then have touched their humanness and realized the common qualities we share. The more we connect with the feelings and needs behind their words, the less frightening it is to open up to other people.

Redefining Vulnerability

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64

SAY: Here's a quick video of Brene Brown discussing the myth that vulnerability is weakness. You may remember Dr. Brown from the Recovery 101 video, The Power of Empathy. So let's see what she has to say about vulnerability.

Play the video for participants.

ASK: Rather than seeing vulnerability as a weakness, how does Brene Brown define it?

- Our greatest measure of courage
- Uncertainty + Risk + Emotional Exposure
- Showing up and being willing to be seen even when there are no guarantees

ASK: Is there anything you found interesting or surprising about this video?

ASK: How can showing more vulnerability actually improve your relationship with your boss?

What Do You Think?

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- What barriers to managing up exist in your workplace?

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RECORD responses on flipchart under heading “BARRIERS”



PART 4

INITIATING REQUESTS TO GET YOUR NEEDS MET

Strategic Framework

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Observations

- Objectively describing what is going on without using evaluation, moralistic judgment, interpretation or diagnosis

Feelings

- Saying how you feel about what you have observed without assigning blame

Needs

- Expressing the basic needs that are or not being met and are the source of feelings

Requests

- Making clear requests for actions that can meet needs

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SAY: Here's a quick overview of NVC's strategic framework. In the next section of this training, we will learn how to apply this framework in recognizing our own feelings and needs – as well as our boss's feelings and needs - to make requests and get these needs met.

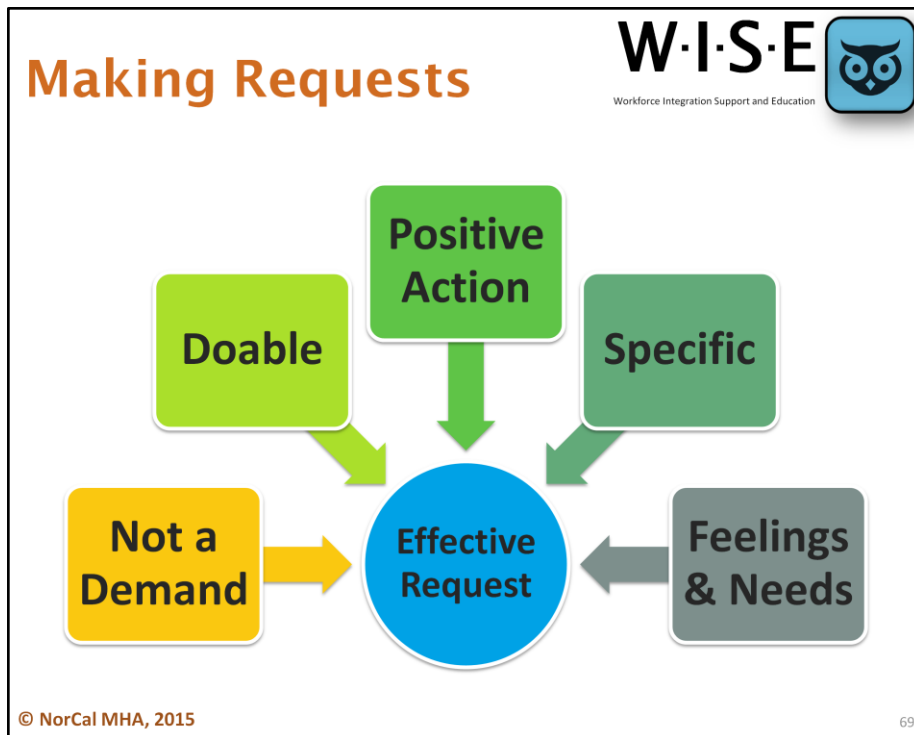
How NVC Works

W·I·S·E

Workforce Integration Support and Education



1. Honest expression
 - My own feelings and needs
 - **What I want, without using blame, criticism, or demands**
2. Empathetically receiving
 - Others' feelings and needs
 - What they want, without hearing blame, criticism, or demands



5-7 minutes

SAY: The key to making effective requests is to ensure your request contains all of the elements listed here.

Avoid Demands

Our requests are received as demands when others believe they will be blamed or punished if they do not comply. When people hear a demand, they see only two options: submission or rebellion. Either way, our request is perceived as coercive, and the listener's capacity to empathize with us is diminished.

(FOR MANAGERS: Sometimes, even when we're conscious of our intent and express our request with care, people may still hear a demand. This is particularly true when we occupy positions of authority and are speaking with those who have had past experiences with coercive authority figures.)

The Request Must Be Doable

A boss saying to a subordinate, "You need to not take things so personally!" may sound on the surface like a reasonable request, but it is not doable. This request leaves out a crucial piece of information—what specific conduct does the boss anticipate would meet his need? Avoid using vague phrases that require interpretation when making requests:

- Would you be reasonable?
- I'd like you to be more considerate.
- Could you please show me some appreciation?
- I just want you to feel good about this decision.

- Would you lighten up?
- Could you be more of a team player?
- Can't you just move on?

Use Positive, Action-Oriented Language

Making requests in clear, positive, concrete action language reveals what we really want. We often use vague and abstract language to indicate how we want other people to feel or be without naming a concrete action they could take to reach that state. You need to tell the other person what it would look like for your need to be met: what is different? What is the other person doing, saying? How are they behaving?

So rather than asking someone to stop or refrain from doing something, ask them what you would like them to do instead.

EXAMPLE ONLY IF YOU HAVE TIME:

A woman was frustrated that her husband was spending so much time at work. She described how her request had backfired: "I asked him not to spend so much time at work. Three weeks later, he responded by announcing that he'd signed up for a golf tournament!" She had successfully communicated to him what she did not want—his spending so much time at work—but had failed to request what she did want. Encouraged to reword her request, she thought a minute and said, "I wish I had told him that I would like him to spend at least one evening a week at home with the children and me."

Be Specific

The clearer we are about what we want, the more likely it is that we'll get it. We need to avoid vague, abstract, or ambiguous phrasing when making requests. People can interpret vague requests in many different ways, making your need less likely to be met. See prior example above – wife should have asked husband to spend more time at home, not less time at work.

Sometimes, the use of vague and abstract language can mask oppressive interpersonal games, like forcing a romantic partner to guess at what you want rather than just coming out and saying it. Being vague distances ourselves from personal responsibility for getting our own needs met and may be a product of fear of expressing our needs. Other times, we may not know exactly what we want to meet our need. Yet if we don't know what we want, how can others? Lack of awareness of what we want from others can significantly contribute to our own negative feelings and unmet needs.

Incorporate Your Feelings and Needs

Without expressing your feelings and unmet needs, your request will come across as a demand. The person doesn't know where the request is coming from or why you want them to change their behavior.

BUT, expressing your feelings alone is not enough: When we stop at expressing our feelings, neither we, nor the person to whom we are speaking, may be aware of what we want them to do. We may not even be conscious of what we are requesting. For example, expressing a complaint is not enough to let the person know what you want them to do differently to meet your needs.

EXAMPLE ONLY IF YOU HAVE TIME:

A man and his wife were on a tram carrying passengers to and from terminals at an airport. The train was running very slowly, taking a long time to travel between terminals.

The man turned to his wife and said with intensity, "I have never seen a train go so slow in all my life." She said nothing, appearing tense and uneasy as to what response he might be expecting from her. He

then did what many of us do when we're not getting the response we want: he repeated himself. In a markedly stronger voice, he exclaimed, "I have never seen a train go so slow in all my life!"

The wife, at a loss for response, looked even more distressed. In desperation, she turned to him and said, "They're electronically timed." This piece of information didn't seem to satisfy him, for he repeated himself a third time—even more loudly, "I HAVE NEVER SEEN A TRAIN GO SO SLOW IN ALL MY LIFE!" The wife's patience was clearly exhausted as she snapped back angrily, "Well, what do you want me to do about it? Get out and push?"

What response was the man wanting? In the above exchange, the wife heard the husband's frustration but was clueless as to what he was asking for.

Using Reflections

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- **For clarity:**
 - Can you tell me what you just heard me say?
- **For connection:**
 - How do you feel about what I just said?
 - What do you think about what I just said?
- **For feedback:**
 - Next time I do that, can you let me know?
 - Next time you do that, can I let you know?

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70

For Clarity

After making your request, ask for a reflection to make sure the other person fully understands what you want and you have an opportunity to correct any potential misunderstandings. Make it clear that you are not quizzing the person or testing their listening skills, but we are checking whether we have expressed ourselves clearly. You may ask:

- Was that clear?
- Can you tell me what you just heard me say?
- Does that make sense?
- Do you understand what I'm asking for?

For Connection

After we've openly expressed ourselves and received the understanding we want, we're often eager to know the other person's reaction to what we've said.

- Sometimes we'd like to know the feelings that are stimulated by what we said, and the reasons for those feelings.
- Sometimes we'd like to know something about our listener's thoughts in response to what they just heard us say.

However, it is important that we be specific about the scope of the reflection we are requesting. When we don't specify which thoughts we would like to receive, the other person may respond at great length with thoughts that aren't the ones we are seeking.

For Feedback

Express appreciation when the listener attempts to reflect back. Empathize with the listener who doesn't want to reflect back.



Exercise 4: Expressing Requests

- Circle the number in front of each statement in which the speaker is clearly requesting that a specific positive action be taken
- **Hint:** If the request is framed in the negative or if it is unclear exactly what to do to comply with the request, the speaker has not requested a specific positive action.

10-12 minutes

HANDOUT: Refer to the handout for Exercise 4: Expressing Requests.

Review the tables on the handout for Exercise 4. Read each example aloud and address any questions as they arise.

ACTIVITY: Working in groups of 2 or 3, complete Exercise 4, circling the number of each statement that you believe is an expression of a request.

Give the group 5-7 minutes to complete the exercise. Then go over the answers as described in the Instructor's Guide.



SAY: Here is an easy way to remember to include all steps when using NVC in interpersonal interactions:

- When I [see/hear/experience/imagine/remember] ...
- I feel ...
- Because I was [needing/hoping/wanting] ...
- Would you be willing to [take a specific, positive action]?

A Brief Word About Needs vs. Strategies

We don't want to confuse the actual underlying need with our chosen strategy to meet the need. For example, money is not a universal human need. We say we "need" money, but what we really need is what the money buys: security, stability, comfort, enjoyment, etc. So you may say "I need you to start the meeting on time" but this is not a true need. It is a strategy you have identified to get another need met, such as predictability, relaxation, connection, respect, etc. This means that other strategies may also exist that meet these needs. So distinguishing between needs and strategies to meet them helps you to keep an open mind and remain flexible to alternative ways to get your needs met.

How NVC Works

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1. Honest expression

- My own feelings and needs
- What I want, without using blame, criticism, or demands

2. Empathetically receiving

- Others' feelings and needs
- What they want, without hearing blame, criticism, or demands

Empathetically Receiving

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- Focus on really hearing the other person, not getting your own needs met
- Ask clarifying questions
- No matter what they say, only hear what they:



- Behind intimidating messages are merely people appealing to us to meet their needs

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74

SAY: When engaging in a conversation to get your needs met, use the components of NVC to tune in to the feelings and needs of the other person.

Ask clarifying questions when appropriate that seek additional information about the speaker's observations, feelings, needs, and requests:

Observations: "Are you reacting to how many evenings I was gone last week?"

Feelings and Needs: "Are you feeling hurt because you would have liked more appreciation of your efforts than you received?"

Requests: "Are you wanting me to tell you my reasons for saying what I did?"

Empathizing with someone's "no" protects us from taking it personally.

The more we practice NVC, the more we realize a simple truth: behind all those messages we've allowed ourselves to be intimidated by are just individuals with unmet needs appealing to us to contribute to their well-being. When we receive messages with this awareness, we never feel dehumanized by what others have to say to us. We only feel dehumanized when we get trapped in derogatory images of other people or thoughts of wrongness about ourselves.

Self-Empathy

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- Strong emotions block us from empathizing with others
- Self-empathy helps us take responsibility for our own feelings and needs
- Practice self-empathy to recognize your triggers and prepare for difficult conversations

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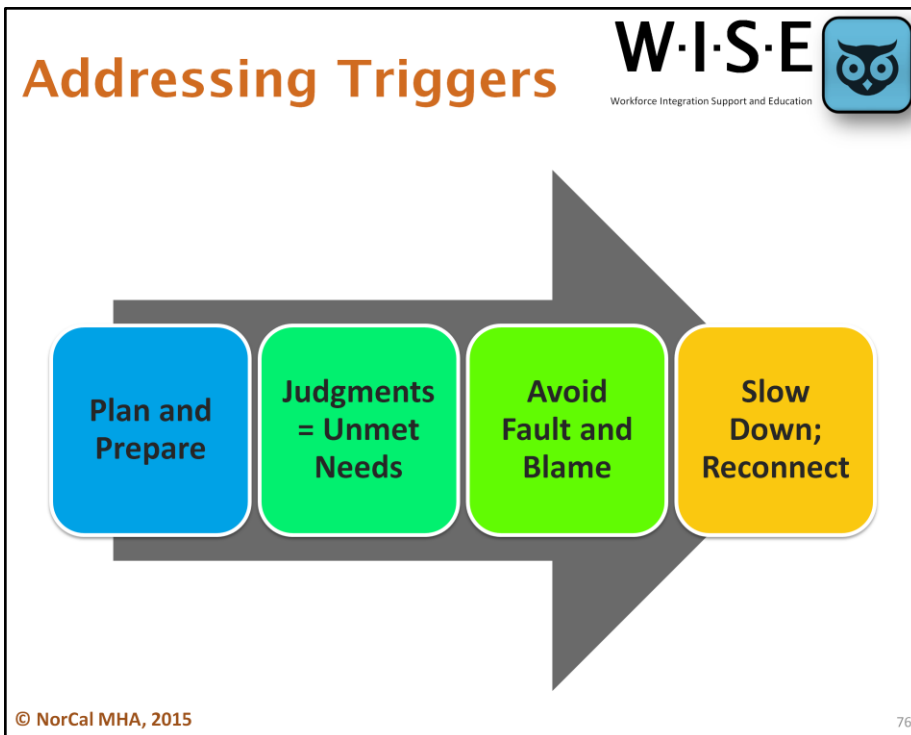
75

SAY: Prior to and during a difficult conversation, it is essential to practice self-empathy. Planning a self-empathy session around your reaction to anticipating the conversation, especially with a support person, can help you be present when you go into it. Setting an intention for the conversation ahead of time will also help.

In self-empathy, we practice the basics of NVC within ourselves—silently. We identify what was actually said or done—the Observation of the situation—and distinguish that from our judgment of it. Then we identify how we feel about it, and what need was or was not met by the words or actions.

So rather than saying “he really makes me mad when he does that” or “he’s so inconsiderate,” practicing self empathy allows us to take personal responsibility for our own reactions by recognizing our feelings and unmet needs. It also allows us to recognize that the same circumstances can have multiple interpretations and the way we view it is not the absolute truth.

When I say, “When I see him do that, I feel sad because I need consideration,” I am saying I know why I am sad, and his conduct is only the start of the story, not in and of itself the reason I am experiencing what I am experiencing. The use of “because” reminds me (and others) that I understand my sadness arises out of my needs and my interpretation of his conduct, and it avoids blaming the other person.



3-5 minutes

ASK: In our line of work, we use the word “trigger” a lot. Can anyone define what a trigger is?

(Dictionary.com defines **trigger** as: “anything, as an act or event, that serves as a stimulus and initiates or precipitates a reaction or series of reactions.”)

SAY: We often get triggered while interacting with others. The stimulus may arise from something someone else said, or something we did or said ourselves. Without awareness, a trigger leads us into habitual reaction.

Plan and prepare for the conversation

We tend to get highly triggered when we think that someone knows our needs are not being met but is doing nothing about it. We may react to their words and behaviors with anger, blame, aggression, or defensiveness because we assume they fully understand our interpretations of their actions and the feelings and unmet needs that arise in us. We see their actions as intentional or at the very least, inconsiderate. However, if we really want the other person to comprehend what we are experiencing, we need to empathize with them first.

If you take the time to prepare for the conversation, you can identify these triggers in advance and strategize about how you will deal with them if/when they arise. (We will discuss preparation more on slide #73.)

Judgments -> Unmet Needs

Practice translating each judgment into an unmet need. Collect all such negative judgments in your head and then ask yourself, “When I make that judgment of a person, what am I needing and not getting?”

Keep your focus on what needs the other person might be trying to meet, without going into analyses of their behavior. It is not as important to be right as it is to be aware that the other person is acting to meet their needs just as you are, and to connect with those needs instead of with your judgment about people's strategies for meeting their needs.

Avoid expressions of fault and blame

People do not hear our pain when they believe they are at fault. As soon as people think that they have done something wrong, they will not be fully apprehending our pain. The more we empathize with what leads them to behave in the ways that are not meeting our needs, the more likely it is that they will be able to reciprocate afterwards.

Slow Down; Reconnect

When you feel triggered:

1. Stop; breathe
2. Identify your judgmental thoughts
3. Connect with your needs
4. Express your feelings and unmet needs
(silently or out loud)

What Do You Think?

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- What are some of your personal triggers when interacting with others?
- What are some successful strategies you have used to address these triggers?

Engage in a 3-5 minute popcorn-style discussion with participants



Exercise 5: Receiving Empathetically

- Circle the number in front of each statement in which person B is responding empathetically to what is going on within Person A

10-12 minutes

HANDOUT: Refer to the handout for Exercise 5: Receiving Empathetically

Review the table on the handout for Exercise 5. Read each example aloud and address any questions as they arise.

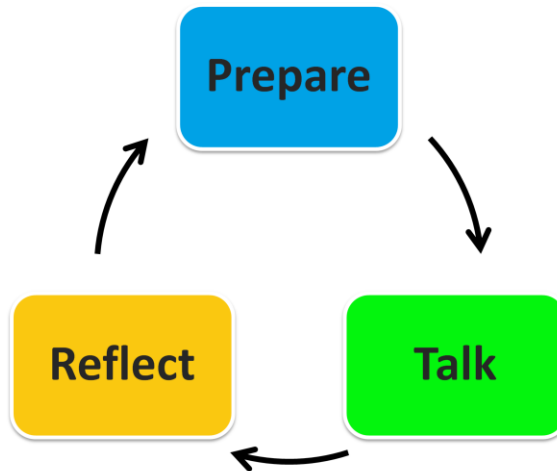
ACTIVITY: Working in groups of 2 or 3, complete Exercise 5, circle the number in front of each statement in which person B is responding empathetically to what is going on within Person A.

Give the group 5-7 minutes to complete the exercise. Then go over the answers as described in the Instructor's Guide.

Tough Conversations

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5-7 minutes

SAY: We all face difficult conversations in the workplace: criticism from our boss, a conflict with a client, a co-worker we find irritating, a subordinate who submits incomplete work—all might entail a conversation we do not look forward to having. When we anticipate that an interaction might be complicated, there are steps we can take to engage with the other person in ways that are more likely to be effective in meeting our needs as well as theirs.

Think about this in three stages:

1. Preparing for the conversation
2. Having it
3. Learning from it afterward

If you have an ongoing difficulty in effectively communicating with someone, you might cycle through these three stages again and again, learning more each time.

Prepare

The preparing stage involves making sure that you have done empathy work ahead of time. If you anticipate that the conversation will be difficult, you might well have judgments and analyses of the person based on past interactions. Giving yourself empathy for your judgments and doing silent empathy for the other person can help you transform the intense emotional charge you might otherwise have going into the conversation, a charge that will tend to create exactly what you don't want. In practicing empathy and self-empathy, you rehumanize the person and connect with your own needs.

You also may want to practice having the conversation with someone else in a role-play. You can tell the other person what you imagine would be difficult for you to hear from the person, and then in the role-

play take the time to give yourself and the other person empathy, then formulate a response.

Practice self-empathy immediately before having the conversation to address last minute concerns and anxiety and to plan how you will begin the talk.

Talk

In the actual conversation, you want to be as present as possible and not rely on a script that cannot be true to the present moment. If you are able to do self-empathy during the conversation, it can help by keeping you present to your needs; however, when first learning, it may be more than enough challenge to simply be in the conversation with as much presence as you can possible.

If you find yourself feeling triggered, it is ok to pause the conversation and take a short break to engage in self-empathy and collect your thoughts. It might sound something like this: “Excuse me, I need to take a break. I’m stimulated; I’m not able to speak with you the way I’d like, and when I’m able to reengage with some hope of being able to do it more effectively, I’ll come back.” Notice that the focus is on you and what you are able to do and not do. There is no blaming the other person for your the time-out. You might even want to say, “This is not about you; it is about me and what’s going on inside of me.”

Reflect

After the conversation, there’s going to be a flood of judgmental thoughts about yourself, the other person, and the situation, so set aside some time to do empathy. During this time, you can reflect on what happened during the conversation, thinking about your needs that were met and not met, and you can guess the needs of the other person. In this learning, you might replay how the conversation went, either in your head or again in a role-play with someone else—but replay it as you would like it to have happened. In this way, you are creating neural networks that store the information in the brain in a way that makes it more readily available when you are next in a similar situation. After going through this process, you then think about the next step, if there is one. As you plan for that step, if it includes another conversation, you cycle back to the first stage of preparation.

Tough Conversations

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SAY: Here is a video of conversation gone bad between an authority figure and subordinate. You'll see a professor, Chris, is meeting with his student, Adam, to discuss Adam's professional goals. Let's watch what happens.

Play the video.

SAY: Now, this scenario is a little different than the typical supervisor/staff situation because it involves a teacher and a student. However, Managing Up is about getting your needs met from a person in a position of authority, so the basic premise still applies. Imagine that instead of his professor, Chris is Adam's supervisor and Adam was meeting with Chris to discuss the very same professional goals.



Exercise 6: Tough Conversations

- Complete the template for your character
 - 1s = Employee
 - 2s = Supervisor
- 1's: Initiate the conversation with a 2 and be sure to make a specific request

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35 minutes

HANDOUT: Refer to the handout for Exercise 6: Tough Conversations

Review the table on the handout for Exercise 6. Read the table content aloud and address any questions as they arise.

Have the participants count off into two groups: 1s and 2s. 1s will play Employee (Adam) and 2s will play Supervisor (Chris) in the scenario.

SAY: Employee has requested a new meeting with Supervisor to discuss his difficulty in delegating tasks to other team members and to share their ideas about how to make their coaching sessions more effective. Using the NVC techniques you've just learned, 1s will prepare for the conversation as the Employee and 2s will prepare for the conversation as the Supervisor. The goal is to identify your character's feelings and needs, anticipate your triggers, and craft a request to meet your needs that the other character is likely to agree to.

1s and 2s - Working in groups of two or three, complete the template in Exercise 6, Tough Conversations, for your character.

- Here, 1s work only with other 1s and 2s work only with other 2s
- Give the participants 10-15 minutes to work together to craft their request to the other character.

Now, 1s (Employees) need to team up with 2s (Supervisors) to initiate the conversation. Because Employee has requested the meeting, 1s will start.

- Here, all 1s need to team up with a separate 2 for this part of the activity. If there is an odd number of participants, you can have one group with two Employees and one Supervisor.
- Give the participants 10-15 minutes to have the conversation.

What Do You Think?

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- How did it feel to express your unmet needs using NVC?
- What was it like to empathetically receive the other person's needs?
- What specific actions were you able to get your partner to agree to?

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5-7 minutes

Draw a line down the center of the flipchart paper and label one side “EXPRESS” and the other side “RECEIVE”

Record the participants' responses to the first two questions under the appropriate heading.

Tips for Giving Your Boss Feedback

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- Assess your relationship first
- Wait to be invited or ask if they want it
- Share your perspective, not analysis
- Gauge their reaction
- When in doubt, leave it out

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83

The Relationship Comes First

The ability to give and receive upward feedback depends on the level of trust between you and your boss. If you know that she's unreceptive to feedback, is likely to react negatively, or if you have a rocky relationship, don't say anything. As with any feedback, your intentions must be good, and your desire to help your boss should supersede any issues you may have with her.

Wait to Be Invited

Don't launch into unsolicited feedback. Some bosses will request feedback at the end of a review or when you first start working together.

If your boss doesn't directly request feedback, ask if she would like it. You can ask something such as "Would it be useful if I occasionally check in with you about how I think the project is going?" or "Can I tell you about something I noticed in that meeting?" Emphasize that you're trying to help her so that the client, project, or organization will benefit.

Share Your Perspective

Focus your feedback on what you're actually seeing or hearing, not what you would do as the boss.

By sharing your perspective, you can help your boss see how others see him. This can be invaluable to a leader who may be disconnected from people in the lower ranks.

Focusing on your perceptions also means realizing the limitations of your standpoint—you're seeing only a partial picture of your boss's performance and all the demands he's juggling.

Good feedback rules still apply. Your feedback should be honest, specific, and data-driven. Open with something positive and then offer constructive comments along with suggestions for improvement. Avoid accusations.

Gauge Their Reaction

Monitor her response to determine how she prefers to receive feedback and what topics are out of bounds. Perhaps she doesn't want to receive pointers on her communication style or a certain high-pressure initiative. Rather than clamming up after a negative reaction, take the opportunity to ask her about what would be useful going forward.

When in Doubt, Leave it Out

If you're not sure your boss wants feedback or if the subject in question is sensitive, it's better not to speak up. Don't risk your working relationship or your job. Instead, look for opportunities to comment anonymously, such as a 360-degree feedback process. If you feel your boss's behavior is putting the company or your unit in jeopardy, follow the appropriate channels in your company—starting with Human Resources or your employee policies and procedures.

If All Else Fails ...

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Translate *Have To* to *Choose To*:

1. List any activity you dread but do anyway because you think you have no choice
2. Insert the words “I choose to ...” in front of each item you listed
3. Complete the statement, “I choose to ... because I want ...”

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SAY: If you’ve tried managing up and attempted to build a better relationship with your supervisor but you cannot find an effective way to get your needs met, reframe your thoughts on remaining in an unsatisfactory situation.

We often endure circumstances because we think we are stuck – that we have no choice. This is not only disingenuous, it is disempowering.

To avoid this trap, translate all the things you think you HAVE TO do into things you actually CHOOSE TO do. Do this by replacing language that implies lack of choice with language that acknowledges choice.

We cultivate self-compassion by consciously choosing in daily life to act only in service to our own needs and values rather than out of duty, for extrinsic rewards, or to avoid guilt, shame, and punishment. If we review the joyless acts to which we currently subject ourselves and make the translation from “have to” to “choose to,” we will discover more play and integrity in our lives.

With every choice you make, be conscious of what need it serves.

STEP 1

List on a piece of paper all those things that you tell yourself you have to do. List any activity you dread but do anyway because you perceive yourself to have no choice.

STEP 2

After completing your list, clearly acknowledge to yourself that you are doing these things because you choose to do them, not because you have to. Insert the words “I choose to ...” in front of each item you listed.

STEP 3

After having acknowledged that you choose to do a particular activity, get in touch with the intention behind your choice by completing the statement, I choose to ... because I want”

As you explore the statement, “I choose to ... because I want,” you may discover the important values behind the choices you’ve made. After we gain clarity regarding the need being served by our actions, we can experience those actions as worthwhile even when they involve hard work, challenge, or frustration.

For some items on your list, however, you might uncover one or several of the following motivations:

- Money
- Approval
- To escape punishment
- To avoid shame
- To avoid guilt
- To satisfy a sense of duty

After examining the list of items you have generated, you may decide to stop doing certain things because you are making a conscious decision that it is more advantageous for you NOT to do them.

What Do You Think?

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- What are some things you dread doing, but keep doing because you think you **have to**?
- What needs of yours are actually being served by performing these actions?

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Engage in a 3-5 minute popcorn-style discussion with participants

Today We Learned About: W·I·S·E

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1. What managing up is and why it's necessary to workplace success
2. How to recognize personal workplace needs
3. Common barriers to managing up
4. How to approach your boss when you have unmet workplace needs

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REVIEW training goals from Slide 8

ASK audience if this training met the needs they identified when the training began



QUESTIONS AND DISCUSSION



**Please complete your post-training
survey and trainer evaluation form**



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88

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