

Career learning for the 21st century

CPD series



LSIS LEARNING
AND SKILLS
IMPROVEMENT
SERVICE

Module 2:

**Introduction to
interviewing skills**

Contents

Introduction to interviewing skills workshop 1	3
Tutor notes	3
Workshop outline	3
Workshop aim and objectives	4
Example workshop timetable	4
Checklist of resources required	5
Slides and notes	6
Case study 1	22
Case study 2	24
LSIS workshop – trainer’s feedback	26
LSIS workshop – attendee’s feedback	27
Introduction to interviewing skills workshop 2	28
Tutor notes	28
Introduction to the extension workshop	28
Workshop aim and objectives	29
Example workshop timetable	29
Checklist of resources required	30
Slides and notes	31
Handout 1 – Egan stage 2: Questions	46
Handout 2 – Egan stage 3: Typical skills	47
LSIS workshop – trainer’s feedback	48
LSIS workshop – attendee’s feedback	49

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This CPD module is available to download in PDF format from the Excellence Gateway Career Development section.

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Introduction to interviewing skills workshop 1

Tutor notes

Workshop outline

This workshop is an introduction to interviewing skills for individuals who interview learners and others as a part of their job role. The three-hour session is aimed at information giving, advisory and fact-finding interviews. Supporting learners with their career development involves a wide range of people and activities from, learning about the world of work, gaining employability skills, developing an understanding of group dynamics, understanding their own motivation and drives, to developing their self-awareness and self-belief. Some of these activities can be very effectively achieved through group activities but others require a designated, one-to-one interview, where the learner is assured of your undivided attention, confidentiality and focus of attention on their development and future.

The workshop is an introduction and awareness-raising session. To become proficient at interviewing, individuals would need more practice, to gain feedback on skills and to undertake further development.

LSIS has developed an online resource, “Career learning for all”, available at www.leadershiplearning.org.uk/course/view.php?id=368. This resource revisits and expands upon the areas covered in this workshop. This module can be delivered by anyone who is an experienced or qualified training professional if they take the time to familiarise themselves with the materials including the web links, handouts and references. It would, however, be an advantage if the trainer had experience and/or training in career development, as it would enable wider and deeper exploration of the topics covered.

The materials can be delivered as they stand, contextualised or modified to suit the time available and the needs of the participants or organisation. The PowerPoint™ slides and handouts are available as separate files.

A three-hour workshop of extension activities is available. It can be run after this workshop to provide more in-depth knowledge of interviewing.

This workshop is the first in a series of CPD workshops produced by LSIS and available to download from the LSIS Excellence Gateway. There are 10 others in the series:

- Introduction to career development
- Introduction to values and ethics in career development
- Introduction to delivering career development through group work
- Introduction to evaluating and measuring impact in career development
- Introduction to reaching potential by raising aspirations
- Introduction to developing employability skills
- Introduction to career development for those with additional support needs
- Learning and earning: understanding the options for your learners
- An introduction to career development for STEM learners
- Introduction to the Blueprint for Careers.

This series of workshops is supported by a one-day “Train the trainer” programme aimed at those who have responsibility for staff development, continuing professional development or for developing a team’s or department’s skills and knowledge in career development. The programme introduces all the workshops: their aims, objectives, exercises and content while exploring how to tailor the content to specific contexts. If you are interested in gaining further information about this programme, please contact ann.ruthven@lsis.org.uk.

LSIS has also developed an online resource, “Career learning for all”, available free of charge on the LSIS virtual learning environment: just go to www.leadershiplearning.org.uk and create your own login. This has been designed for those involved in supporting learners with their career development, both specialists and non-specialists.

Workshop aim and objectives

The **aim** of the workshop is to explore the nature and features of interviews.

The **objectives** of the workshop are to enable participants to:

- state what distinguishes an interview from other forms of communication
- list the main stages of an interview
- identify the main skills involved in interviewing
- interview colleagues using three main interviewing skills.

Example workshop timetable

Time	Session
09.30	Welcome, domestics, introduction of presenter and session
09.33	Aims and objectives, group introductions
09.49	Trust – sharing personal information
09.55	What is or is not an interview?
10.05	Stages of an interview
10.10	Case study 1 – agendas?
10.30	Rapport, body language, boundaries and contracting
10.50	Case study 2
11.00	Refreshment break
11.15	Case study revisited – interviewing skills
11.25	Active listening
11.45	Interviewing practice
12.20	Summary
12.30	Conclusion

Checklist of resources required

- Fire evacuation procedures.
- PowerPoint™ slides 1 to 15.
- Flip chart and marker pens, or whiteboard.
- Screen.
- LCD projector.
- Laptop.
- Copies of case study 1 (see page 22).
- Copies of case study 2 (see page 24).
- Evaluation form: LSIS workshop – trainer’s feedback (see page 26).
- Evaluation form: LSIS workshop – attendee’s feedback (see page 27).

Slides and notes



Introduction to interviewing skills workshop

Presented by

Date

Slide 1

Customise this visual to show your name and the date of the workshop.

Welcome the learners, introduce self, and outline the title and format of the session. Read out fire evacuation procedures and tell participants about location of toilets etc.

Resources: Fire evacuation procedures.

Timing: 3 minutes

Transition statement: Let's look at what we will be covering today.

Your notes:

Aim and objectives



Aim

To explore the nature and features of interviews.

Objectives

By the end of the session participants will be able to:

- State what distinguishes an interview from other forms of communication
- List the main stages of an interview
- Identify the main skills involved in interviewing
- Interview colleagues using three main interviewing skills.

Slide 2

Read out aim and objectives and ask if there are any questions.

Remind the participants that this is an introductory session. They will not be expert practitioners, but should understand the basics and have some practice.

Resources:

Timing: 3 minutes

Transition statement: To get everyone talking, we will have a short exercise.

Your notes:

Introductions



Find a partner – ideally someone you do not know very well.

You are going to interview each other finding out the following:

- Name
- Job role
- Experience with interviewing
- One piece of extra personal information

You have three minutes for each interview.

You will each introduce the other person to the group.

Slide 3

Ask participants to interview each other briefly, finding out: name, role, experience of interviewing and one extra piece of information. They have two minutes (i.e. a minute each) to interview each other and a few seconds each to introduce the other person. Take feedback with each interviewer introducing the interviewee.

Ask group to list skills they had used in the interviewing process. List these skills on a flip chart or whiteboard headed 'Interviewing skills'.

Point out that in even such a short period of time, when focused, they found out quite a lot of information.

Resources: Flip chart or whiteboard headed 'Interviewing skills'.

Timing: 3 minutes to interview each other, 5 minutes to introduce people to the class (depending on the number of attendees) and 5 minutes to find out what interviewing skills they used.

Transition statement: As interviewing can involve some personal issues, we must look at the important subject of trust.

Your notes:

Trust



Definition: A willingness to ascribe good intentions to and have confidence in the words and actions of other people.

Cook and Wall (1980)

Characteristics:

- Uncertainty – a leap of faith
- Risk – vulnerability, it may go wrong
- Perception – based on our perception of trustworthiness.

Caproni (2005)

Slide 4

Before showing the visual: Ask participants what types of personal information they were willing to share. Talk about why people talk about the weather, surroundings etc. when they first meet. Ask the group what needs to happen for them to share more personal information. Normally groups come up with: trust; respect for person; reliability; keep confidence; longer time; give and take; share information; same values; same type of person; empathy.

Show the slide and talk through the definition of trust and the characteristics. When we trust others it is a risk – we cannot fully be certain what they will do with the information. This makes us vulnerable – could be exposed, embarrassed etc and note that we base our belief of trustworthiness on our perceptions – can be wrong! Relate this to working with learners. How do they form trust with staff? Where can it go wrong?

Resources:

Timing: 6 minutes

Transition statement: I am sure we all have an idea of what an interview is, but let's try and agree on a working definition.

Your notes:

What is an interview?



A formal meeting or exchange that has:

- An implicit or explicit contract
- A serious purpose
- A two-way exchange
- Some agreed outcomes.

Slide 5

Before showing the visual: Ask participants to list three things that an interview is not. Give them a minute and then list their findings. Common responses are: chat; gossip; debate; set of instructions; monologue; argument; lecture; ramble; moaning session; interrogation; tirade; rant etc. Ask why, what was meant to be an interview, could lead into some of these other forms of communication. Answers could be: emotional state of interviewee or interviewer; lack of skills; wrong time or wrong place. Say everyone needs to think of these issues when dealing with learners.

Show slide 5 – What is an interview? Emphasise formal and serious process, contract, two-way with outcomes. Feedback from learners has shown that there is a high frequency of tutorial interviews turning into one of the above (interrogation, rant etc.) Feedback from tutors is that they don't have adequate time in their busy schedules and they try to get the interchange over as quickly as possible.

Resources:

Timing: 10 minutes.

Transition statement: Having agreed that an interview is a formal process, let's look at how an interview is structured.

Your notes:

Stages of an interview?



Beginning – building a working alliance

1. Create a friendly, encouraging atmosphere – building rapport
2. Establishing the broad purpose – contracting

Middle – exploring potential and identifying options

3. Gather information and question interviewee
4. Identify the interviewee's needs

End – identifying goals and follow through

5. Give information to the client
6. Summarise progress made during the interview
7. Clarify the next steps

Adapted from Bimrose, Barnes, Hughes and Orton (2004) and Bedford (1982)

Slide 6

Show slide 6 – Stages of an interview? – and explain that interviews are forms of communication and like stories, novels, essays etc, they have beginnings, middles and ends. Like the others, they need to set the scene; ensure the audience and players know their role and purpose; explore the situation and the characters' needs and wants; and then summarise and conclude. Ask if there are any questions and if there are parts of interviews they miss out. Frequently groups admit to missing out the beginning – ask what occurs. Some miss out the ending and people are left uncertain and unsure.

Give out case study 1 – ask people to form groups of three or four. Tell them they have 10 minutes for this exercise. Read out the questions and ensure everyone understands what they have to do. Gather feedback from each group on questions 1, 2 and 3. The points need to include: different agendas; misunderstandings; an exchange but not an interview – not serious or formal; no contract; no set time or outcomes. It could have been handled better by: agreeing Sally's needs and wants; setting a contract; active listening; agreeing time and place for discussion; focusing on Sally; not judging; not making assumptions; listening not advising.

Resources: Copies of case study 1.

Timing: 5 minutes, plus 15 minutes for the exercise and 5 minutes for feedback.

Transition statement: The interview in the case study got off to a bad start. We will now look at how to begin an interview.

Your notes:

Beginning the interview



Rapport:

- Empathetic understanding
- Acceptance – unconditional positive regard
- Genuine – congruence.

Rogers, CR (1967)

Slide 7

Beginning the interview.

Say Rogers was a psychotherapist working in USA mid 20th century. He was responsible for creating person-centred counselling, believing the quality of relationship was more important than skills, knowledge or models held by helpers in enabling clients to progress.

He believed that in order to create these excellent relationships you needed to create rapport through: empathetic understanding – actively listening and stepping into the other person's shoes, acceptance – being non-judgemental and respecting others' views and being genuine or congruent – our voice and body language give the same messages, we are being genuine.

Resources:

Timing: 5 minutes

Transition statement: Of course, we don't just communicate through the things that we say. We are also giving out messages non-verbally.

Your notes:

Body language



Non-verbal communication:

- Facial expressions
- Eye contact
- Body posture
- Arms and legs relaxed
- Non-verbal sounds – Mmm
- Gestures
- Nods
- Keeping still.

Slide 8

Body language – act out, non-verbally, to the group what you look like when you are angry, sad, happy, bored and interested. Ask the group to say what they feel you are depicting and how it has been communicated.

Resources:

Timing: 5 minutes

Transition statement: During the interview it is important that the interviewer knows when to continue and when to refer. We describe this as considering 'boundaries'.

Your notes:

Boundaries



- Interviewer competence
- Interviewer job role
- Purpose of interview
- Referral points.

Slide 9

Say boundaries are very important and we need to be clear about our capabilities, our job role and the nature of the relationship before contracting, which we will look at next.

The interviewer must know what they are comfortable with, what is within their competence to deal with and when they should conclude the interview and refer.

Discuss with the group what needs to be considered regarding interviewer competence. Normal responses are: skills; knowledge; characteristics; personality traits; emotional states; emotional intelligence and recognising their own bigotries and judgements.

Ask about the issues connected to job role. You need to check the group highlights purpose of role, authority, organisational processes, procedures, codes, values and ethics and constraints such as time and resources.

You need to ensure that the group considers issues about being client-centred – the interview is for the learner and their best interest, not the interests of the organisation or the teacher, assessor or adviser.

Focus on confidentiality. Ensure everyone is aware of the aspects they can keep confidential and those they would have to report to someone outside of the interview. Relate this to their job role and their range of responsibilities.

Highlight the need for interviewers to know when to refer to other agencies and to have a network of agencies available. Discuss how they would make referrals within their organisations.

Resources:

Timing: 5 minutes

Transition statement: As well as having rapport and knowing the boundaries, it is essential that both parties are clear about what is going to be achieved in the interview.

Your notes:

Contracting



Contracting means agreeing with the interviewee the nature and scope of the discussion to take place. The interviewer and interviewee both need to be clear about the purpose of the interview and have realistic expectations.

Contracts should cover:

- Interviewee's and interviewer's agenda
- Time available
- Scope of interview
- Confidentiality issues
- Any other activities or support that may be required.

Slide 10

Contracting. Go through the definition and what it should include. Go back to the case study and ask what could have been contracted by Peter and Sally. Ask what difference a contract would have made to the situation: clarified agendas; focused on the topic; made Sally feel respected; gained Peter's attention.

Hand out case study 2. Ask people to form groups of six. Go through the questions at the top of the page. Remind people that they have 10 minutes for this exercise.

Resources: Copies of case study 2.

Timing: 5 minutes plus 10 minutes for the case study.

Transition statement: After all that, I am sure you feel like a break. Can you be back in 15 minutes please.

Your notes:

Interviewing skills



- Establishing rapport
- Contracting
- Active listening
- Empathy
- Questioning
- Probing
- Summarising
- Reflecting
- Agreeing next steps
- Challenging
- Target-setting
- Managing time.

Slide 11

Before showing the visual: Remind everyone where they had got to before the break. Ask open questions about what was covered and prompt them for any missing bits.

Ask each group to feed back, one at a time, why the interview was more successful second time round: correct setting; contract negotiated; rapport; open questions; focused questioning; respect; genuine response; non-judgemental; listening rather than advising; not offering advice without being asked. Ask each group in turn for two interviewing skills identified – write them on to the list you prepared after the introductory interviews. Keep asking for skills until everyone's responses have been included on the list.

Show slide 11 and highlight any areas that have not been included on the list. Ask the group what they feel about the list when completed – most groups reply by saying that interviewing is a skilled activity. Point out that this range of skills has wider uses, such as during an ad hoc meeting in a corridor or when answering questions in class.

Resources: Flip chart or whiteboard with the list of interviewing skills, created at the beginning of the class, and markers.

Timing: 10 minutes.

Transition statement: We have identified listening as one of the key skills for interviewing. Now we will have a short exercise to have a chance to try it out.

Your notes:

Active listening



Form groups of three: interviewer, interviewee and observer.

You will all play each role:

- **Interviewee** to talk for 3 to 5 minutes.
- **Interviewer** to actively listen and feed back at end of sessions: content, emotions, and perceived motivation of interviewee.
- **Observer** to feed back signs of active listening.

You have 15 minutes for the whole exercise.

Slide 12

Active listening. Talk through instructions for the exercise on the slide. Ask people to work with people they had not worked with before if possible.

Explain that they are each being asked to play three roles. Say the interviewer is being asked to listen for what is being said, what emotions they perceive and what they feel the person's motivation is regarding the issue, i.e. will they do anything about it?

Remind the observer to keep the triads to the time set.

Allow each triad to complete the exercise and then ask for feedback on how they found it. How easy was it to listen? How did it feel to be listened to? How did they show they were listening? How accurate were they at feeding back content, emotions and motivations.

Ask for barriers to listening in the workplace and list them on a flip chart or board.

Resources: Flip chart or whiteboard and markers.

Timing: 15 minutes for the exercise and 5 minutes plenary session.

Transition statement: Stay in the same groups and we will have a little more in-depth practice.

Your notes:

Interviewing practice



Working in same triads, with same roles practice a full interview.

- **Interviewee:** Talk about an issue you would like to share or about a student's issue – maintaining confidentiality.
- **Interviewer:** Contract, explore the situation, question, probe, summarise and conclude the interview.
- **Observer:** Note the skills shown by the interviewer and the interviewee's responses prompted by these skills. Feed back your results.

Slide 13

Ask the triads to stay together and show slide 13 – Interviewing practice.

Read out instructions and check for understanding.

Ask observers to ensure timing is kept.

At the end of the exercise, ask for general feedback on what went well and what went not so well.

Resources:

Timing: 30 minutes for the exercise and 5 minutes for introduction and wrap up.

Transition statement: That brings us to the end of the formal teaching and exercises. Let's look back at what we have covered today.

Your notes:

Summary



Objectives

- What is an interview?
- What are the stages of an interview?
- What skills do you need to interview effectively?

Learning

- What have you learned personally about your interviewing practice and skills?

Thank you for attending; please complete an evaluation form.

Slide 14

Summarise the session:

Ask questions – go back to relevant slide if the group are unsure.

Ask for feedback on learning.

Give out Evaluation forms.

Conclude the session.

Resources: Evaluation forms.

Timing: 10 minutes

Transition statement: I have included a list of the references used in this class so you can do further reading on interviewing.

Your notes:

References



Bimrose, J, Barnes, S, Hughes, D and Orton, M (2004) *What is effective Guidance? Evidence from Longitudinal Case Studies in England*, DfES/ Warwick Institute for Employment Research

Bedford, T (1982) *Vocational Guidance Interviews Explored*, London: Careers service Branch, Department of Employment

Caproni, PJ (2005) *Management Skills for Everyday Life* New Jersey: Pearson Education

Cook, J and Wall, T (1980) New Work Attitude Measures of Trust, Organizational Commitment and Personal Need Nonfulfillment. *Journal of Occupational Psychology*, 53: 39–52

Rogers, CR (1967) *On Becoming a Person: A Psychotherapist's View of Psychotherapy*, 2nd ed., London: Constable and Company Ltd.

Slide 15

Thank the group for their participation.

Resources:

Timing:

Transition statement:

Your notes:

Case study 1

Interviewing skills

Consider the following interchange and, in groups of three or four, answer the following questions:

1. What were Peter and Sally trying to achieve in this interchange?
2. Was it an interview? Give reasons for your decision.
3. How could Peter have handled the interchange more effectively?

You have 15 minutes for this exercise. Be prepared to present your results to the whole group.

Situation 1

Peter, a programme manager, was having a well-earned cup of tea when he heard a knock on his door. The following interchange took place.

Peter: “Come in.” Sally, one of his favourite and most talented learners, entered the room.

Peter: “Hi Sally, how are you?” Said in a bright and cheery tone.

Sally: “Confused.” Said in a subdued tone, while avoiding eye contact and looking at the floor.

Peter: “What’s up? You’re doing really well you know.” Said in a concerned tone trying to make eye contact.

Sally: “I think I might go to uni, but don’t know what to do?” Said in very quiet voice, while fiddling with her hair and looking out of the window.

Peter: “Come off it Sal – you are brilliant – of course you know what to do!”

Sally: “Don’t be silly – what I mean is, do I go at all, all that money, and do I do Fine Art or Illustration?” Sally goes red, looks at the floor, and rubs one foot behind the heel of the other.

Peter: “Talent like yours does not come every day, money you can make later, you’re young – enjoy life!” Said in a bracing tone.

Sally: “What about Fine Art or Illustration?” (Said in a challenging manner.)

Peter: “Up to you. I am sure any decent place will take you for either.”

Sally: “Really? Are you saying I will definitely get places for straight Fine Art, straight Illustration or Fine Art with Illustration?” (Voice raised, facing Peter directly, with a challenging stare.)

Peter: “Well I’m not the HE admissions or Ucas but if they had any sense they would! Believe in yourself girl!”

Sally: “You are no help at all!” She flounces out of the room, banging the door shut.

Peter: “Well, thanks for nothing, I say you are brilliant and all I get is abuse!”

Peter left his cup of tea to get cold and felt aggrieved and out of sorts for the rest of the week. He never established a working relationship with Sally again.

Case study 2

Interviewing skills

Consider this second interchange involving Sally. Within the group decide:

1. What made this a more satisfactory interchange for Sally?
2. Identify the skills displayed by Svetlana.

You have 10 minutes for this exercise.

Situation 2

Sally has stormed into Svetlana's class, disrupted the group, and burst into tears. Svetlana tells the group to continue with their work and asks Sally to step outside the class. Svetlana says she can see Sally is upset, offers her a tissue and asks if Sally would like to sit in the 'quiet area' of the library or get support from a student adviser. Sally says she would like time to calm down and come back later to speak to Svetlana. They agree a time and venue.

Svetlana: "Hi Sally. How are you feeling now?"

Sally: "Much better, I went for a long walk and kicked a few stones."

Svetlana: "What would you like to discuss?"

Sally: "I just want someone to help me decide on uni!"

Svetlana: "When you say, 'help you decide'?"

Sally: "Yeh, everyone assumes I am going and that I will get in. No one asks! How do I decide to get into all that debt? How do I know it will be worth it?"

Svetlana: "What could we usefully do this afternoon, in the hour that we have at our disposal, that would help?"

Sally: "Help me think through what I need to think about."

Svetlana: "Would it help to think through the pros and cons of going to uni compared to other options?"

Sally: "Big time."

Svetlana and Sally worked on a piece of flip chart paper with Sally listing the pros and cons of going to higher education compared to looking for work or continuing at college with a different course.

Svetlana: “Has that helped?”

Sally remains silent, eyes looking toward the ceiling.

Svetlana: “What are you thinking now? “

Sally: “I’m frightened – it’s all so scary and I do not know enough to make a decision or take the leap.”

Svetlana: “What would help you feel able to make the decision?”

Sally: “Knowing that someone in uni thought I was good enough and knowing what it was like to be there. How many get jobs at the end?”

Svetlana: “Have you thought of contacting the course leaders at some universities and asking to visit with your portfolio?”

Sally: “Can I do that? Would they see me?”

Svetlana: “They are in the business of selecting students for a wide variety of courses and they offer open days, some offer taster sessions and they will offer interviews. Course leaders are the experts so they are the ones to ask – not me.”

Sally: “That’s what I am going to do tomorrow – I’ve seen this course I really like the look of in Coventry ... Thanks Svetlana, you have been a great help.”

Svetlana: “So what are you going to do next?”

Sally: “Look up the email address of the course leader in Coventry – it’s on the website – and write asking if they will give me an interview to discuss whether I am suitable for the course. Get my portfolio in order and start doing more work!”

“Bye, I’ll let you get home now and thanks a million.”

LSIS workshop – trainer’s feedback



Please use this form to feedback how useful you found the training materials provided. This is not to measure the success or otherwise of your class, but to help us improve the quality of the materials provided.

Name of workshop: Introduction to interviewing skills workshop 1	Date of workshop:
--	-------------------

Using a rating of 1 = very good to 7 = very poor, please answer the following questions:

	Rating
Overall how happy were you with the materials?	
How well did you think the course met its aim and objectives?	
How well did the course meets its aim and objectives?	
How would you rate the handouts?	
How would you rate the PowerPoint presentation?	
How would you rate the exercises?	
How would you rate the trainer’s background information?	

Which parts did you find most useful?
Which parts did you find the least useful?
What do you think could be done to improve the materials?
Please comment on the suitability of the timings provided.
Any other comments?

LSIS workshop – attendee’s feedback



Name of workshop: Introduction to interviewing skills workshop 1	Date of workshop:
--	-------------------

Using a rating of 1 = very good to 7 = very poor, please answer the following questions:

Overall how useful did you find the course?	
How would you rate the materials provided?	
How would you rate the trainer?	
How useful were the exercises?	
How would you rate the pace of the course?	
How would you rate the length of the course?	

Which parts did you find most useful?
Which parts did you find the least useful?
What do you think could be done to improve the workshop?
Any other comments?

Introduction to interviewing skills workshop 2

Tutor notes

Introduction to the extension workshop

This workshop has been designed as either a follow up to the Introduction to interviewing 1 session or for those people who are experienced in giving information and advice and would like to develop a more in-depth guidance style of interviewing. This style of interviewing is more suited to those whose role includes having to explore career and learning decisions with learners or who are expected to work with learners to bring about changes in their thinking or behaviour.

It is an awareness-raising and exploratory session, introducing a guidance model as a comparison to the basic interviewing techniques described in the first session. As with the initial session, interviewers would need to undertake further training and development to become proficient.

This module can be delivered by anyone who is an experienced or qualified training professional if they take the time to familiarise themselves with the materials including the web links, handouts and references. It would, however, be an advantage if the trainer had experience and/or training in career development, as it would enable wider and deeper exploration of the topics covered.

The materials can be delivered as they stand, contextualised or modified to suit the time available and the needs of the participants or organisation. The PowerPoint™ slides and handouts are available as separate files.

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- Introduction to values and ethics in career development
- Introduction to delivering career development through group work
- Introduction to evaluating and measuring impact in career development
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- Introduction to developing employability skills
- Introduction to career development for those with additional support needs
- Learning and earning: understanding the options for your learners
- An introduction to career development for STEM learners
- Introduction to the Blueprint for Careers.

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Workshop aim and objectives

The **aim** of the workshop is to explore the stages and skills of a guidance interview.

The **objectives** of the workshop are to enable participants to:

- define the term ‘guidance’
- analyse when they give guidance in their role
- list the three main stages of Egan’s role
- interview a colleague using Egan’s first stage
- analyse skills required for one stage of Egan’s model.

Example workshop timetable

Time	Session
13.30	Welcome, domestics, introduction of presenter and session
13.32	Aim and objectives
13.34	What is guidance?
13.36	Your role exercise
13.56	Boundaries
14.05	Egan’s model
14.30	Stage 1 practice
15.10	Refreshment break
15.25	Stage 2
16.00	Stage 3
16.20	Summary
16.30	Conclusion

Checklist of resources required

- Fire evacuation procedures.
- PowerPoint™ slides 1 to 13.
- Flip chart and marker pens, or whiteboard.
- Handout 1 – Egan stage 2: Questions (see page 46).
- Handout 2 – Egan stage 3: Typical skills (see page 47).
- Evaluation form: LSIS workshop – trainer’s feedback (see page 48).
- Evaluation form: LSIS workshop – attendee’s feedback (see page 49).

Slides and notes



Introduction to interviewing skills 2 – digging deeper

Presented by

Date

Slide 1

Customise this visual to show your name and the date of the workshop.

If this is a new session, welcome the learners, introduce yourself, the outline, the title and format of the session.

Read out fire evacuation procedures and tell participants about location of toilets etc.

If being run as a follow-up to Introduction to interviewing session 1, welcome participants back, review the morning session and introduce the new topic.

Resources: Fire evacuation procedures.

Timing: 2 minutes

Transition statement: Let's look at what we will be covering in this session.

Your notes:

Aim and objectives



Aim

To explore the stages and skills of a guidance interview.

Objectives

By the end of the session participants will be able to:

- define the term guidance
- list the three main stages of Egan's model
- interview a colleague using Egan's first stage
- analyse skills required for one stage of Egan's model.

Slide 2

Read out the aim and objectives and ask if there are any questions.

Resources:

Timing: 2 minutes

Transition statement: As this session is about guidance, let's look at what it is.

Your notes:

Guidance – what is it?



Using counselling skills to bring about change in client's thinking or behaviour.

Bimrose, Barnes, Hughes and Orton (2004)

Helping clients to:

- understand their own needs relating to learning and work
- set and review goals and objectives for learning and work
- understand their barriers to learning and work
- overcome barriers and obstacles to learning and work
- produce learning and career action plans.

DfES (2003)

Slide 3

Tell participants that you want to remind them what the activity is and how it differs from information and advice.

Ask what is meant by 'counselling skills'. Answers should include: rapport, empathy, questioning, active listening, reflecting, challenging, personalising, summarising etc.

Resources:

Timing: 2 minutes

Transition statement: We will now have a short exercise to examine how guidance fits in with your role.

Your notes:

Your guidance



Work in pairs. Consider the following:

1. Using these definitions of guidance, when do you give learners guidance?
2. How big a percentage is it of your job role?
3. What training have you received to deliver guidance?

You have 10 minutes for this exercise.

Slide 4

Say that if we agree with the previous definition, we now need to consider how this fits into their roles within education. Show slide 4 and talk them through what is required in the exercise. If this is the first time you have met this group, ask them to introduce themselves to each other and take names at the feedback stage.

Allow 10 minutes for the exercise and then take feedback from each pair. Note on a flip chart or board, common areas of guidance and the range of proportion of time spent on this activity.

Resources: Whiteboard or flip chart and pens.

Timing: 10 minutes for discussion and 10 minutes for feedback.

Transition statement: We have looked at guidance you might be giving. Remember that before offering guidance, interviewers should consider the boundaries within which they will operate.

Your notes:

Boundaries



- Interviewer competence
- Interviewer job role
- Purpose of interview
- Referral points.

Slide 5

Remind the group that we looked at boundaries in the initial session. Ask the group to reflect on *their* boundaries within guidance interviewing.

What does the practitioner need to consider before offering guidance?

- Qualifications and experience in guidance, in counselling skills and in the area being discussed
- Job role and job conflicts
- Time for interaction
- Competence
- Characteristics.

Resources:

Timing: 9 minutes

Transition statement: The rest of today's session will be based on a well-known model

Your notes:

Egan's model



Stage 1: Reviewing the current scenario – where are you now?

Stage 2: Developing the preferred scenario – where do you want to be?

Stage 3: Getting there – how will you get there?

Egan (2007)

Slide 6

Explain that you are now going to introduce a well established, tried and tested, client-centred, problem-solving model of guidance, devised by Gerard Egan in 1975.

Show slide 6 and say that these three stages are what guidance is about – enabling the client to clearly understand where they are at present, having a clear picture about where they wish to be or what they want to achieve and then considering how they are going to get there.

Explain that Egan based his model on Rogers' (1967) "core conditions" of genuineness, respect and empathy.

Resources:

Timing: 5 minutes

Transition statement: Each of Egan's stages has three levels within it.

Your notes:

Egan's three levels



Egan's three stages can be tackled at three different levels:

Level 1: Exploratory, expansive and creative

Level 2: Challenging, reality testing and selective

Level 3: Focusing, committing and taking action.

Slide 7

Show the group slide 7 and explain that the model allows for the exploration and understanding of each stage at three levels.

Each stage can be tackled in an exploratory fashion – encouraging learners to open up, consider their situation from many angles, think through where they are, consider different scenarios about where they would like to be and then creatively think through all the options for getting there.

A second deeper level would take the learner into testing out where they really are, considering other people's perspectives, considering the impact of their behaviour now and in their preferred future, setting goals and considering their motivations to act.

The third level encourages the learner to be focused, making commitments, planning and establishing firm next steps.

Resources:

Timing: 10 minutes

Transition statement: We will look at each stage in more depth, starting with stage 1.

Your notes:

Stage 1: Where are you now?



1a: **The story** – What’s going on?

Encourage the individual to tell and explore their story.

1b: **Blind spots** – What’s really going on?

Assist individuals to uncover blind spots, gaps in perception, perceptions of others and reality testing.

1c: **Leverage** – What do you really want ?

Enabling the individual to prioritise, identify what would make a difference and where they wish to focus their energies.

Slide 8

Talk through stage 1 level a) – **The story** – say this is about giving a safe space for the learner to tell their story in their own words and to be actively listened to and respected. It allows the person to articulate their situation – forces them to put thoughts into order. This requires open questions: How do you feel about that? What are you thinking? What is that like for you? What else is there about that?

Move on to level b) – **Blind Spots** – Sometimes it can be difficult for learners to see anything beyond their own perception. This level through empathy and reflection challenges the learner to consider other perceptions: How would others describe that situation? How do others view you? What impact does this have on ... ? It encourages the learner to look for themes and patterns in their situation, face blind spots or gaps in their perception.

The final level c) – **Leverage** – the key to this level is uncovering what the learner is motivated to change, move or shift. Use questions like: What in all of this is most important? What would make the most difference? What would be best to work on now? What do you feel you could tackle at this point?

Resources:

Timing: 10 minutes

Transition statement: OK, let’s try some of this out.

Your notes:

Practice stage 1



Think of a situation or issue that you would be happy to share. Work in a group of three. Each of you will play the role of interviewer, interviewee and observer.

The **interviewer** has to:

- Contract - work at stage 1, agree timings and confidentiality
- Interview working at the level of stage 1 appropriate to the needs of your interviewee.

The **observer** has to:

- Observe body language and interaction
- Note effective questions and skills for this stage
- Feed back to interviewer.

There are 10 minutes allowed for each interview.

Slide 9

Say that you are now going to ask them to practice this stage, working at the appropriate level for their client. Show slide 9 and talk through what is required.

Triads: interviewer, interviewee and observer. The interviewee should think of something they are happy to share – work issue, past work problem, any situation they would value talking about in this environment. Remind everyone of the need for confidentiality within the group.

Interviewer to contract – refer to contracting slide in Introduction to interviewing 1 session if necessary – interview using Egan’s model at stage 1 – level to suit needs of interviewee.

The observer must be very focused, noting verbal and non-verbal behaviour that promotes the aims of this stage – facilitating, exploring, clarifying, challenging, focusing etc.

Resources:

Timing: 30 minutes for the interviewing part of the exercise (10 minutes each interview) plus 10 minutes for feedback.

Transition statement: Well done. I think you all deserve a break now. Can we resume in 15 minutes please.

Your notes:

Stage 2: Where do you want to be?



- 2a: **Possibilities** – Ideally where do I want to be instead?
Encourage the individual to broaden horizons, be imaginative, see that there are possibilities.
- 2b: **Change agenda** – Where do I really want to be?
Enable individual to test out possibilities, consider the wider impact and set SMART goals.
- 2c: **Commitment** – What scenario or goals am I committed to?
Facilitating the individual to consider costs and benefits and risks and gains.

Slide 10

Get everyone back into the main group and remind them what has been covered so far. Ask for feedback on what was effective in these interviews for this stage. List skills on a flip chart or board.

Typical responses will include: open questions; active listening; summarising; reflecting back content and emotions; personalising i.e. when you say ... what is your part in this; outline your responsibility for this aspect; challenging; probing; using silence.

Tell participants that you are now going to go through the various levels at stages 2 and 3.
Show slide 10.

Possibilities: creative level, facilitate broadening of horizons, considering all sorts of possibilities, encourage use of imagination get them to see, feel and hear it!

Change agenda: encourage forming SMART (specific, measurable, achievable, realistic and temporal) goals. Point out that motivating research has shown people are more motivated by goals that are slightly challenging – goals they feel they could reach but have to work to achieve.

Commitment: this is the “How” stage – how will the person move forward – what will motivate them to achieve this goal, is it the right goal, analyse costs, benefits, risks, gains, pressures pushing for the change and pressures pushing against the change.

Ask group which of these levels they feel would be the most difficult for their particular learners.

Give out handout 1 – Egan stage 2: Questions. Ask the group to split into groups of four.

Ask them to consider each of the levels and to generate typical questions that could usefully be asked at each level.

Answers could include:

- Level a) What do you want instead? If you could wake up tomorrow and everything was as you wanted, what would it be like? What would you have that you do not have now? What would you want to be doing?
- Level b) What exactly is your goal? What would make you happiest? How would you know when you got there? When would you want to achieve it by? What do you feel is most achievable?
- Level c) What are the driving forces for this change? What are the benefits of the change? What are the factors that could hinder the change? How will it be different for you when this is completed?

Resources: Flip chart and pens, or whiteboard, and handout 1 – Egan stage 2: Questions.

Timing: 35 minutes

Transition statement: Let's move on to the last stage.

Your notes:

Stage 3: How will you get there?



- 3a: **Possible actions** – 101 ways to achieve the goal
Encourage individual to generate ideas on how they could get there, who and what could help and what they could use from past experiences.
- 3b: **Best fit strategies** – What will work best for me?
Enabling the individual to think through which strategy has the most appeal, plays to their strengths and makes the biggest steps toward their goal or outcome.
- 3c: **Plan** – What am I going to do?
Facilitating the individual to commit to action, considering the steps required, prioritising, allocating time and resources.

Slide 11

Remind them the final stage is 'How will you get there?'

Talk through the three levels saying that they are similar to the levels in the other stages.

Level a) **Possible actions** is creative, exploratory, generating lots of ideas – some could be wild, crazy ideas.

Level b) **Best fit** is focusing on realistic options for the learner, considering possible barriers and risks, and how to overcome them, prioritising options, considering which will achieve most of what they desire, which are within their resources.

Level c) **Plan** moving towards an action plan – bite-size chunks, what, how, when, where, with whom? Checking the motivational levels.

Ask the group to look at handout 2 – Egan stage 3: Typical skills. Ask the group to consider which skills are required at each level and write up responses on a flip chart or board.

Level a) Rapport building, empathy, active listening, facilitation of idea storming, open questions, generating creative ideas.

Level b) Open questions, probing, problem-solving techniques, e.g. force field analysis, SWOT, challenging, reflecting, paraphrasing, summarising.

Level c) Focusing, motivating, analysing, encouraging, active listening, summarising, reflecting, challenging, use of silence and recording.

Resources: Handout 2 – Egan stage 3: Typical skills. Flip chart or whiteboard and pens.

Timing: 20 minutes

Transition statement: Let's summarise what we have covered in this session.

Your notes:

Summary



- What is guidance?
- What are Egan's three stages?
- What are the three levels in Egan's model?
- What skills are required for the third stage of Egan's model?
- What types of questions are useful in stage one?
- What have you learned from this session?

Thank you for attending; please complete an evaluation form

Slide 12

Summarise session using slide 12.

Ask questions – go back to relevant slide if the group is unsure.

Ask for feedback on learning.

Give out evaluation forms.

Resources: Evaluation forms.

Timing: 10 minutes

Transition statement: I have included a list of the references used in this class so you can follow up on what we have covered.

Your notes:

References



Bimrose, J, Barnes, S, Hughes, D and Orton, M (2004) *What is effective Guidance? Evidence from Longitudinal Case Studies in England*, DfES/ Warwick Institute for Employment Research.

Department for Education and Skills (DfES Learning and Skills Council/ Ufi (2003) *Information, Advice and Guidance for Adults: The National Policy Framework and Action Plan*, London: Learning and Skills Council.

Egan, G (2007) *The Skilled Helper*. Belmont, CA USA: Thomson Higher Education.

Rogers, CR (1967) *On Becoming a Person: A Psychotherapist's View of Psychotherapy*, 2nd ed, London: Constable and Company Ltd.

Slide 13

Thank the group for their participation.

Resources:

Timing:

Transition statement:

Your notes:

LSIS workshop – trainer’s feedback



Please use this form to feedback how useful you found the training materials provided. This is not to measure the success or otherwise of your class, but to help us improve the quality of the materials provided.

Name of workshop: Introduction to interviewing skills workshop 2	Date of workshop:
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Using a rating of 1 = very good to 7 = very poor, please answer the following questions:

	Rating
Overall how happy were you with the materials?	
How well did you think the course met its aim and objectives?	
How well did the course meets its aim and objectives?	
How would you rate the handouts?	
How would you rate the PowerPoint presentation?	
How would you rate the exercises?	
How would you rate the trainer’s background information?	

Which parts did you find most useful?
Which parts did you find the least useful?
What do you think could be done to improve the materials?
Please comment on the suitability of the timings provided.
Any other comments?

LSIS workshop – attendee’s feedback



Name of workshop: Introduction to interviewing skills workshop 2	Date of workshop:
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Using a rating of 1 = very good to 7 = very poor, please answer the following questions:

Overall how useful did you find the course?	
How would you rate the materials provided?	
How would you rate the trainer?	
How useful were the exercises?	
How would you rate the pace of the course?	
How would you rate the length of the course?	

Which parts did you find most useful?

Which parts did you find the least useful?

What do you think could be done to improve the workshop?

Any other comments?

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