

Competency & Emotional Intelligence Quarterly

THE JOURNAL OF PERFORMANCE THROUGH PEOPLE

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Geetu Orme and Kate Cannon, two respected practitioners in the field of emotional intelligence, share their insights and hints on how to successfully implement an EQ training and development programme. In this third of four articles, they outline ways to assure the highest quality of implementation.

So far in our series on creating successful emotional intelligence (EQ) programmes (details are given in box 1 below), we have considered the initial steps that must be taken – such as establishing the business case for the intervention and conducting the training-needs assessment – and the essential design considerations for creating a training programme that produces long-term change. Both of these steps involve *preparing* for the change. The third phase, *implementing* the programme itself (or “taking the show on the road”) is about achieving the desired benefits.

In this article, we take the training guidelines for good practice as outlined by the EQ Consortium¹ and provide specific examples of the guidelines in action from our own programmes. These guidelines were developed as a result of a rigorous study of best-practice EQ programmes, which identified 12 criteria that should be considered in the implementation of EQ training programmes. The guidelines are reproduced in box 2 on p.18.

We analyse each of the guidelines from three viewpoints:

- explaining why the guideline is important in EQ development;
- providing a list of actions or strategies to meet the guideline, using examples from actual EQ development programmes; and
- including three reflective questions to enable you to review your own practice against each guideline.

But first a word of caution – all the guidelines described here should be considered within the *context* in which you are working. While we have included our own examples here, these are not necessarily applicable in *every* situation and for *every* group of participants in *every* organisation.

GUIDELINE 1

Fostering a positive relationship between you and your participants

We believe it is no coincidence that this guideline is number one in

1. Overview of series

1. Getting started (vol. 8 no.1, Autumn 2000)

Conducting the needs assessment; key issue: *How can emotional intelligence support the business?*

2. Design (vol. 8 no.2, Winter 2000/01)

Designing the programme; key issue: *What are the necessary elements for the programme?*

3. Taking the show on the road (this issue)

Implementing the EQ programme; key issue: *How do we assure the highest quality of implementation?*

4. Assuring quality (vol. 8 no.4, Summer 2001)

Evaluating the programme; key issue: *How will we measure quality and improve the programme?*

Implementing an EQ programme: 3

2. Guidelines for good practice

The Consortium for Research on Emotional Intelligence in Organizations' 12 guidelines on good practice in EQ training programmes.

1. Foster a positive relationship between trainer and learners.
2. Maximise self-directed learning.
3. Set clear programme goals.
4. Break goals into manageable steps.
5. Maximise opportunities for practice.
6. Provide frequent feedback on practice.
7. Rely on experiential methods.
8. Enhance insight.
9. Prevent relapse.
10. Provide models.
11. Encourage use of skills on the job.
12. Provide an organisational culture that supports learning.

the EQ Consortium's list of training guidelines, since we consider it to be the key to the successful implementation of the training. It must be the case that a positive outcome is more likely if programme participants have a good working relationship with the facilitator. If participants perceive the facilitator to be empathic, warm and approachable, they are more likely to be open to change and engage fully in the learning process.

This positive relationship involves more than the facilitator's personal qualities – it is about giving as much attention to the “relationship” as to content during the design and delivery of the programme. This increases the effectiveness of the learning process. We, the authors, believe that a confrontational “teaching style” interferes with learning and is inappropriate to emotional intelligence development work. At its most benign, it turns learners off; at its most destructive, it triggers an emotional hijack.

We believe that a positive relationship begins before the training and can be influenced as early as the preparation stage. Specific examples of actions you can take prior to training are:

■ **Negotiate a broad learning contract** before the event, which includes what participants can expect from the facilitator and what

the facilitator expects of participants. As many participants' expectations will have been shaped through prior experiences, the completed learning contract provides the facilitator with both valuable individual background information and an understanding of their assumptions.

■ **Contact each person** by telephone before the programme begins to clarify any questions and allay any concerns.

■ **Provide a programme outline**, either in writing or communicated in person, in order to create an understanding of what it will “feel” like to participants.

■ **Ask all participants** to respond to some basic questions before the event, and have their answers available (and preferably typed up) when people arrive. For maximum value, it is best to use a mixture of factual questions (eg “What is your name? Where do you live? Where do you work?”) and more searching questions (eg “What is important to you in your work? What do you most want to gain from this programme?”). This information can be presented in the form of a “welcome board” (using a white board, a poster, etc) on which each person's name appears, together with their answers to the questions. This usually helps a participating group to get to know each other quickly at the outset of a programme.

During the training, positive relationships can be fostered through the following:

■ **Make “strategic” self-disclosures.** Demonstrate that you are willing to share stories and experiences in order to facilitate participants' learning. Be aware throughout of the level of rapport that you are building with the group and take care not to dominate the group through disclosures of your own personal “war stories”.

■ **Be available to participants** who wish to spend more time on a one-on-one basis discussing their personal experiences and issues. Meal times and breaks are useful for fostering good relationships with programme participants and for being available for deeper discussions.

■ **Work through activities yourself** at the same time that the group is completing them. Be prepared to share your own examples. This helps participants to “engage” closely with the material and realise that you are continuing to develop your own emotional intelligence.

■ **Encourage humour** and laughter through your choice of activities (balancing more serious ones with upbeat, light-hearted ones) and through your own careful use of humour. While EQ development work is of a serious nature, it does not have to be conducted in a formal tone (which can create barriers to learning for some participants).

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■ **A word of caution** – because of the nature of this training, be careful not to create the impression that you have “favourite” participants.

Reflective questions:

1. *To what extent do you give as much attention to interpersonal dynamics as you do to programme content?*
2. *What messages do you communicate about your commitment to participant development by the way in which you spend breaks and mealtimes?*
3. *To what degree do you work to develop an individual relationship with each person, as much as a relationship with the whole group?*

GUIDELINE 2

Maximise self-directed learning

This guideline is about creating choice in the learning process – by asking participants to set their own goals and deciding which emotional competencies they want to develop. This will help you adjust your delivery based on participants’ goals and preferences.

Ways to do this include:

■ **Personal goals:** Ask each person to identify their goals at the beginning of the training event and then to review progress against them.

■ **Shared ownership:** Ask everyone to record the goals of the other participants and return to these in a structured way at key points during the training. This helps to create shared ownership for reaching desired goals. It can also direct the facilitator to spend a longer or shorter amount of time on a particular topic.

■ **Learning reviews:** Conduct regular learning reviews using the following questions:

What have you learned?

How can you apply this learning after the programme?

What did you like?

What did you dislike? (or what is getting in the way of your learning?)

■ **Supported learning:** Include in the programme design some ways in which participants can support each others’ learning.

■ **Modifying goals:** Provide opportunities for goals to be modified.

Reflective questions:

1. *At which points in your training do you offer choice to your learners?*
2. *How do you capture individual goals at the outset and keep these in focus throughout your training event?*
3. *To what extent do you observe learning preferences early in an event and use your observations to influence your style of facilitation?*

GUIDELINE 3

Set clear programme goals

Within each session, the clearer the programme objectives, the easier it is for participants to know what is expected of them. It is particularly useful for the programme goals to link with what is important to participants. The authors have found that goals are more likely to be achieved where they relate to something that the individual values in their home or work life. For example, a personal goal “to increase the time I spend with my family” may be more compelling for someone who resents the amount of time they are spending at work, compared with the goal “to improve my time management at work”.

Ways to do this include:

■ **Modify your goals:** When you develop the programme goals, carefully consider the unique needs of each group and modify them accordingly.

■ **Communicate the objectives** in advance of the training event.

■ **Outcomes:** Write each goal in the form of an outcome, eg “By the end of this session, you will be able to . . .”.

■ **Ensure that each goal is SMART** (specific, measurable, achievable, realistic and time-scaled). For example, a goal such as “By the end of this session, you will know what emotional intelligence is” will be hard to measure, whereas a goal such as “You will be able to explain accurately the relevance of emotional intelligence to your job” is tighter and therefore easier to measure.

■ **Display the goals** on the wall so that they are on view all the time, and/or include them in participants’ workbooks.

Reflective questions:

1. *How do you ensure that your programme goals are learner-centred rather than trainer-oriented?*
2. *Which methods do you use to ensure that programme goals stay in focus throughout your training?*
3. *How do you ensure that programme goals are meaningful enough to participants for them to want to “own” them jointly with the facilitator?*

GUIDELINE 4

Break goals down into manageable steps

This guideline is about taking participants’ goals and breaking them down into manageable steps so that they can more easily observe the changes that take place. People are more likely to change if they perceive the change to be attainable. For instance, it will not be helpful to someone working on his or her “self-regard”² to express the goal in

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3. Sample EQ development plan	
MY EQ GOAL IS (TO INCREASE, DECREASE, DEVELOP . . .)	
IF I ACHIEVE THIS GOAL, I WILL REALISE THE FOLLOWING BENEFITS:	
IF I DO NOT ACHIEVE THIS GOAL, THE CONSEQUENCES MIGHT BE . . .	
DEVELOPMENT ACTIVITIES:	TARGET COMPLETION DATE:
1.	
2.	
3.	
BARRIERS TO ACHIEVING THIS GOAL ARE:	STRATEGIES FOR REMOVING THOSE BARRIERS ARE:
HOW WILL I KNOW THAT I AM ACHIEVING THIS GOAL?	
MEASURE 1	
MEASURE 2	
MEASURE 3	

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a simplistic fashion as “to increase my self-regard”. It will be more effective to include processes and tactical steps to help the individual achieve this overall goal.

Ways to do this include:

- **Progress:** Provide an explicit framework for moving from goals to actions (an example you could use is given in box 3 above).
- **Sharing goals and actions:** Ask participants to state their goals

and action steps publicly, so that other participants can comment on the content and detail of their actions.

■ **Record the action steps** and use them as part of your follow-up support.

Reflective questions:

1. *What are your strategies for ensuring that participant goals and actions are stated in the positive (moving towards what they want), rather than in the negative (moving away from what they don't want)?*
2. *To what extent do you feel comfortable challenging a participant who has set goals that are too ambitious to be achieved?*
3. *Which areas of your own life could you use to demonstrate the process of setting goals and creating specific action steps?*

GUIDELINE 5

Maximise opportunities to practise

While “life” is the real classroom of emotional intelligence development, the trainer can create situations during the programme where new skills are practised. Emotional intelligence development work often involves trying to alter deep-rooted patterns and habits. By explaining and working with new responses to particular situations, the facilitator is helping the participants to learn to create more adaptive behaviour and attitudes.

In reality, the facilitator is teaching the individual participant how to create new neural pathways in the brain, so that more choices are available. As Cherniss (2000) highlights: “To reprogram neural circuits connecting the amygdala and the neocortex, people need to engage in the desired pattern of thought, feeling and action. The neocortex understands words and ideas, but the amygdala does not. The amygdala, one of the centers of emotion, is much older in evolutionary terms than is the neocortex. Learning in the brain's emotional centers occurs not through words and ideas but through *simple, repeated actions and vivid experiences*”³ (our emphasis). The forming of new habits involves the facilitator including opportunities for the participant to practise and repeat the new habits until they feel natural and easy.

This Chinese saying sums it up well:

What I see, I forget

What I hear, I remember

What I do, I understand

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Ways to provide opportunities to practise:

- **Use training films and videos** to demonstrate the desired skills.
- **Role-play** to demonstrate the skills – for example, take a daily situation, such as frustration with technology, and role-play emotional management.
- **Coaching:** Provide opportunities for participants to coach each other. For example, create triads in which two people are role-playing and the third is a coach.

Reflective questions:

1. *To what extent is your choice of practice methods influenced by your own past experiences of learning? What other media could you try?*
2. *What is the mix of individual and small-group practice sessions in your training?*
3. *What ratio of practice time to other activities do you design in your training?*

GUIDELINE 6

Provide frequent feedback on practice

The word “feedback” was first used in systems theory in the middle of the last century. One useful way to think about feedback is by considering it as a communication process between facilitator and programme participant. Through feedback, the facilitator initiates a series of “nudges” to keep the participant on track with their goals. This is an important process in emotional development work. When learners are integrating their new skills and abilities, it is useful for them to know exactly how “good” they are and which aspects of emotional intelligence they should work on. The simplest way for a facilitator to provide this self-awareness is through frequent and specific feedback during the training.

Ways to provide frequent feedback:

- **Tell participants what you observe** about them, both informally and during specific feedback sessions. One way to capture this feedback is to use a “feedback board”, where each person’s name is listed (including the facilitator), and the facilitator and participants add comments as the event unfolds. If you use this method, make sure that all the feedback is positive, specific and clearly identifies what someone is doing well and what they could do to an even greater extent.
- **Model the importance of feedback** by asking for feedback on your facilitation and making adjustments where necessary.
- **Build in structured methods** for participants to give each other feedback during practice sessions.

- **Written feedback:** Provide opportunities for participants to write and share their feedback. For example, at the end of a programme, each person randomly chooses the name of another participant and then writes a note to express appreciation for that person’s contribution to the group.

There is a particularly useful set of feedback cards available from Gower Publishing, which includes descriptive words of strengths and weaknesses. These cards very are useful in emotional intelligence development work for people who are not used to giving feedback⁴.

Reflective questions:

1. *What messages do you communicate about the importance of feedback in your learning contract?*
2. *To what extent is there balance in the quantity and type of feedback that you give to others compared with the amount of feedback that you ask for and receive about yourself?*
3. *What methods do you use to ensure consistency in the quality of feedback provided to participants during your training?*

GUIDELINE 7

Rely on experiential methods

Because emotional intelligence involves social and emotional learning, it requires more time being spent on experiential methods and less time on passive methods such as reading and lecturing. The authors have found that the use of different media helps people create enduring behavioural change.

Examples of specific experiential methods:

- **Poetry** can be a useful method for focusing on emotions that participants want more of in their lives. For example, each person is asked to write and read a poem about an emotion that they would like to experience more often. Usually, they choose a positive emotion like happiness, joy or fulfilment. This exercise can be used to reinforce concepts of personal power, communication and emotional self-awareness.
- **Well-known films** can demonstrate and reinforce key points about emotional intelligence. It is particularly powerful to ask participants to watch certain films before they come to a programme and reflect on the following questions while they are watching them:
Who had the highest emotional intelligence? Why?
Who had the lowest emotional intelligence? Why?

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Who are you most like? Why?

Who are you least like? Why?

■ **Photography** is an exciting way to reinforce self-awareness. Inspired by the work of Bernie Saunders of Integra Learning Systems Inc⁵, Geetu provides each participant with a throwaway camera at the start of the training event. They are asked to take photographs to depict various aspects of the topics that are being covered. The photographs are developed before the end of the training and each person creates a collage of their learning.

Reflective questions:

1. *Which media could you include in your training to extend the reach, and therefore the power, of your emotional intelligence development work (the arts, nature, music, theatre, film, poetry, dance, mime)?*
2. *How do you discipline yourself to explain the full rationale of why you are using a particular creative medium, before embarking on the journey of introducing a new activity to your group of participants?*
3. *What examples from everyday life of emotional competence could you capture to use within your training?*

GUIDELINE 8

Enhance insight

Insight is the process whereby participants start to create deep personal awareness leading to change. As Cary Cherniss highlights in the Consortium's guidelines: "The most effective training combines experiential methods and the development of insight." While insight will be enhanced through feedback and the use of experiential methods (see guidelines 6 and 7), there are other ways to enhance insight throughout the training. A useful structure for designing emotional intelligence development work is the "three Is": Information, Insight and Integration. Accordingly, "Insight" should represent approximately one-third of the training.

Ways to enhance insight:

- **At the end of each day**, ask participants what insights they have had about themselves.
- **Barriers:** Ask each person to state their "hot buttons" (the things that annoy them or get in the way during training events). In this way, all participants and the facilitator can be more tuned into potential blockages or conflicts within the group. For example, one participant on a recent programme stated that she "hated people being late back from breaks". She said that much valuable time was often wasted "while people took their own sweet time to come back after a comfort

break or a refreshment break". The facilitator was able to make the link with the emotional competence of "impulse control" so that she was more aware of her pattern and how this could affect her relationships with other people (both in the training room and other parts of her life). Surfacing hot buttons can help to create insight within a group.

■ **Reflection:** Include many opportunities for reflection in the design of the training programme. The opportunity could be unstructured – for example, 10 minutes for journal writing – or targeted, such as responding to provocative questions.

Reflective questions:

1. *What methods do you use to enhance your own insight? Which of these could you incorporate into your training?*
2. *To what extent do you include in your training multiple processes to increase the insight of your participants?*
3. *To what degree are you comfortable with the balance in your training between Information, Insight and Integration?*

GUIDELINE 9

Prevent relapse

Participants are more likely to be equipped with strategies for dealing with setbacks when they are able to predict their occurrence. This guideline is about including processes to prevent failure. It is important for participants to recognise that setbacks are a natural part of change so that they do not become discouraged when they occur.

Ways to prevent relapse include:

- **Reinforce the notion** that "resistance" is a natural stage before "change" or "enlightenment". This can help participants to reframe difficulties that they encounter.
- **Include a focus on "obstacles"** during goal-setting and development planning so that barriers are anticipated and addressed.
- **Create a structure** within the group for providing follow-up support. For example, each person could be encouraged to identify a "learning partner" for supporting his or her efforts after the training. The person then takes responsibility for telephoning or meeting their partner to provide mutual support for their actions.
- **Motivational letters:** Ask participants to write themselves a letter to provide themselves with motivational support. The letter is written on the day of the training and posted to them by the facilitator or their "learning partner" 30 days later.

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Reflective questions:

1. To what extent do your training designs reflect your acceptance of setbacks as a necessary part of change?
2. What methods do you have for helping participants differentiate between “real” and “imaginary” obstacles?
3. Which processes do you build into your practice that provide direct support for participants after the event? Are they effective?

GUIDELINE 10

Provide models

It is easier to develop emotional skills and competencies when you have live models of emotional intelligence to emulate. This guideline suggests that, where possible, the inclusion of role models of high emotional intelligence enhances learning. Learning will be enriched whenever the facilitator uses these models for careful analysis, study and reflection.

Ways to provide models within your training:

- **Personal role models:** Ask participants early on in their training to state the names of their key role models for high emotional intelligence from their own lives, from history or from fiction. Ask them to share this information, stating who the person is and their qualities. Make links between these qualities and the emotional competencies with which you are working.
- **Recognise your responsibility** to be a model of emotional intelligence. Use your stories to illustrate emotional intelligence in action. Model your ability to stay focused, clear and confident throughout your training.
- **Use video tapes and training films** to show models of high emotional intelligence. If you use a number of different video and film clips, try to sequence them in an order that involves moving from easy to more difficult so that learning builds.

Reflective questions:

1. Which aspects of emotional competence do you model well and which aspects are you working on?
2. Which processes do you include in your training for discovering the life experiences of participants that have helped to shape their views about emotional intelligence?
3. Among the films that you have seen recently, either on television or in the cinema, which scenes of high and low emotional intelligence do you recall? Which of these seem appropriate (subject to copyright permission)⁶ to use within your training?

GUIDELINE 11

Encourage use of skills on the job

Learning is enhanced if participants are encouraged to make use of their new abilities on the job. This is part of the “transfer and maintenance” phase described in the EQ Consortium’s guidelines. This guideline suggests that by encouraging the use of skills in actual work situations, the new abilities are more likely to be applied as a result of the training investment.

Ways to incorporate this:

- **Asking for examples:** Ask participants to give you examples of specific situations where they can make use of a particular emotional competence.
- **Have an action list** that participants can add to during the training so that they capture the specific situations where they can use emotional competence back at their workplace. Ask participants to share this list of situations at the end of the training. Use the list to create a follow-up self-assessment of emotional competence. They could be encouraged to use this about a month after the training in order to gauge the extent to which they have applied their skills on the job.
- **Work projects:** As part of action planning, ask participants to identify a specific work project that will help them make use of the skills they have learnt. From the authors’ experience, tangible, concrete projects enable participants to use their energy productively to implement new skills and gain the support of their supervisors and line managers. This is particularly evident where projects are tightly defined, with clear goals, deliverables, support and action steps.
- **Incentives:** Ask participants to create their own incentives for the application of the EQ skills on the job.
- **Create an e-mail distribution list** for the participants. They can use this to share their experiences of applying EQ skills.

Reflective questions:

1. What degree of support is necessary for participants to use their learning on the job fully? How much of this can you provide? Who else needs to be involved?
2. To what extent does your own preference or lack of preference for pragmatism influence the number of on-the-job applications within your training?
3. To what extent is your training a “mirror” of your participants’ daily work lives, through the way it is conducted? Or is it more a “utopia”?

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GUIDELINE 12

Provide an organisational culture that supports learning

When the training ends, participants return to their workplaces and their families, to people who often have not been part of their learning experience. It is important to recognise that the prevailing “culture” in these settings can serve to encourage or discourage the use of new skills. In his seminal book on training evaluation⁷, Donald Kirkpatrick describes organisational cultures to which participants return after a training event under the following five categories:

- preventing** – the culture prevents the use of new skills;
- discouraging** – the culture discourages the use of new skills;
- neutral** – the culture neither encourages or discourages the use of new skills;
- encouraging** – the culture reinforces and supports the use of new skills – for instance, through line managers reviewing the learning with each participant as soon as they return after a training event; and
- requiring** – the culture demands that the new skills be implemented as a natural part of the training investments made.

Ways to influence an organisational culture so that it supports learning:

- **Ask participants** about the culture that they work in before a training event.
- **Design:** Use the above structure to audit the culture before you design your training and use this contextual knowledge to influence your training design and the processes that you build in to maximise transfer of new skills.
- **Provide support and guidance** for the line managers of participants. This can be communicated before the event and reinforced afterwards. It is useful to create a simple factsheet explaining the following aspects of the training:
 - what emotional intelligence is;
 - its importance for work and personal life;
 - what is covered in the training;
 - the specific benefits that can result from the training (from the line manager’s perspective);
 - the ways in which the line manager can reinforce and support the participant’s learning; and
 - things to avoid that can undermine the participant and their learning.

Reflective questions:

1. Which of Donald Kirkpatrick’s five categories do you think is the ideal culture for emotional intelligence development work?

2. To what extent do you believe that you and the participants can influence the context or environment through emotional competence?

3. What support can you provide before and after the training to provide an encouraging environment for new emotional competencies?

SUMMARY

In this article, we have reviewed the EQ Consortium’s guidelines for training, and provided examples and checklists to help you implement the guidelines. The theme of our final article will focus on “evaluating the programme” and will answer the question: “How will we measure quality and improve the programme?”

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Notes and references

¹ The Consortium for Research on Emotional Intelligence in Organizations is a panel of emotional intelligence experts and academics whose mission is to identify and disseminate standards for EQ programmes. Members of the consortium have studied the best practices of selected programmes and created technical guidelines for the development of emotional intelligence programmes. The full technical paper, which details the guidelines, can be downloaded from www.eiconsortium.org. Also available from the consortium’s web site is *Bringing emotional intelligence to the workplace: a technical report*, by Cary Cherniss and Daniel Goleman.

² One of 15 sub-components of the Bar-On EQ-i™, which measures your ability to value and respect yourself, including your strengths and your limitations.

³ *Promoting emotional intelligence in organizations*, Cary Cherniss and Mitchel Adler, American Society for Training and Development, 2000, pp.117–8.

⁴ *The feedback game*, Peter Gerrickens, Gower Publications, 1999, web site: www.gower.co.uk

⁵ Bernie Saunders of Integra Learning Systems can be contacted on (+1) 763 479 1226, e-mail: bernie@integralelearning.com, website: www.integralelearning.com

⁶ To find out the names of distribution companies that own particular films, contact the Internet Movie Database, web site: www.imdb.com. To seek permission to use commercial videos in the USA, contact BZ/Rights & Permissions, tel: (+1) 212 924 3000, web site: www.bzrights.com

⁷ *Evaluating training programs: the four levels*, Donald L Kirkpatrick, Berrett-Koehler, 1998.