

# Self-Monitoring and Self-Management

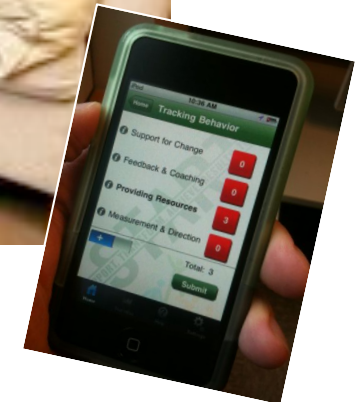
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Oregon Institute of Occupational  
Health Sciences



# Olson Lab @ OHSU

- Total worker health interventions
- Isolated work and self-management



# Goals/Outline

- What is self-management and self-monitoring?
- Why is self-monitoring effective?
- Self-monitoring applied in the workplace, including benefits and pitfalls
- Evolution of supportive supervisory self-monitoring
  - WFHN Phases 1 and 2; SERVe Study

# Self-Management

- Methods by which people purposefully direct their own behavior towards achieving personal goals
- Time management, scheduling, self-assessment, gratitude diaries, etc.

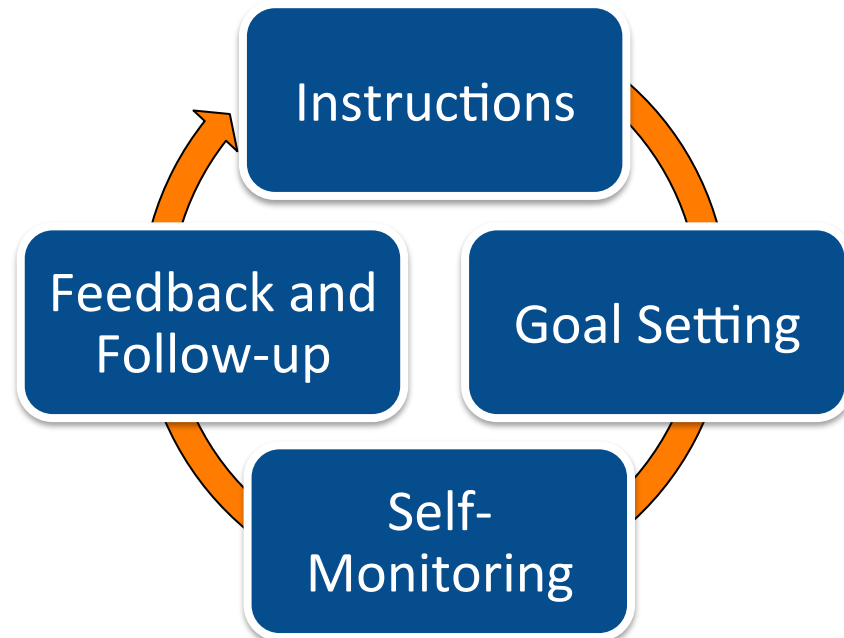


# Behavioral Self-Monitoring

- *Repeated self-observation, evaluation, and recording of one's own behavior*
- Effective and widely applied by clinicians
  - Treatment (motivational tool)
  - Assessment (data gathering)
- Growing popularity for personal use
  - Self-tracking, self-monitoring, quantified self

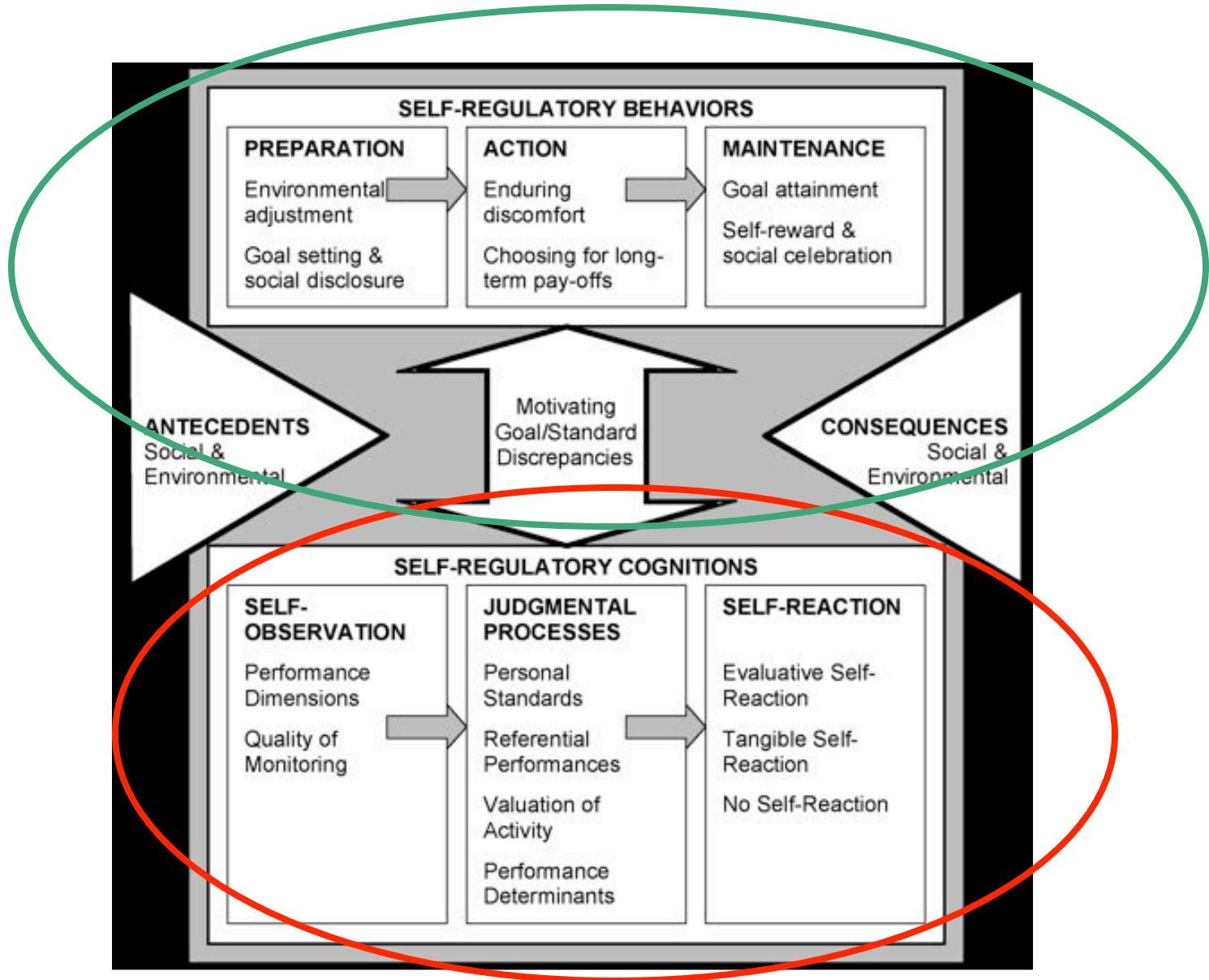
# Behavioral Self-Monitoring

- Increasingly used in occupational interventions
  - Research
    - Ergonomic Assessment
    - Ecological Momentary Assessment
    - Diary Studies
    - Transfer of Training
  - Olson & Winchester review (2008) average  $d = 2.8$



# Why Does BSM have Motivational Effects?

## *An Elaborated Model of Self-Regulation*



# The Value of Feedback

- Take blood pressure reading
- Blood pressure is high
- Your BP is 160/110
- **Motivating Discrepancy:**  
Desirable BP range is below 120/80, yours is 160/110





# Potential Workplace Benefits

- Treatment
  - Improvements in productivity and safety
  - Health promotion
- Assessment
  - Hazard and error tracking, ergonomic exposures
  - Mood, behaviors, and setting events
- Theory
  - Self-management, motivation

# Potential Workplace Pitfalls

- The helping hand *strikes* again!
- Workers are different from clients of medical and psychological therapies (e.g., choice)
- Self-monitoring the 'wrong' behaviors can lead to undesirable outcomes

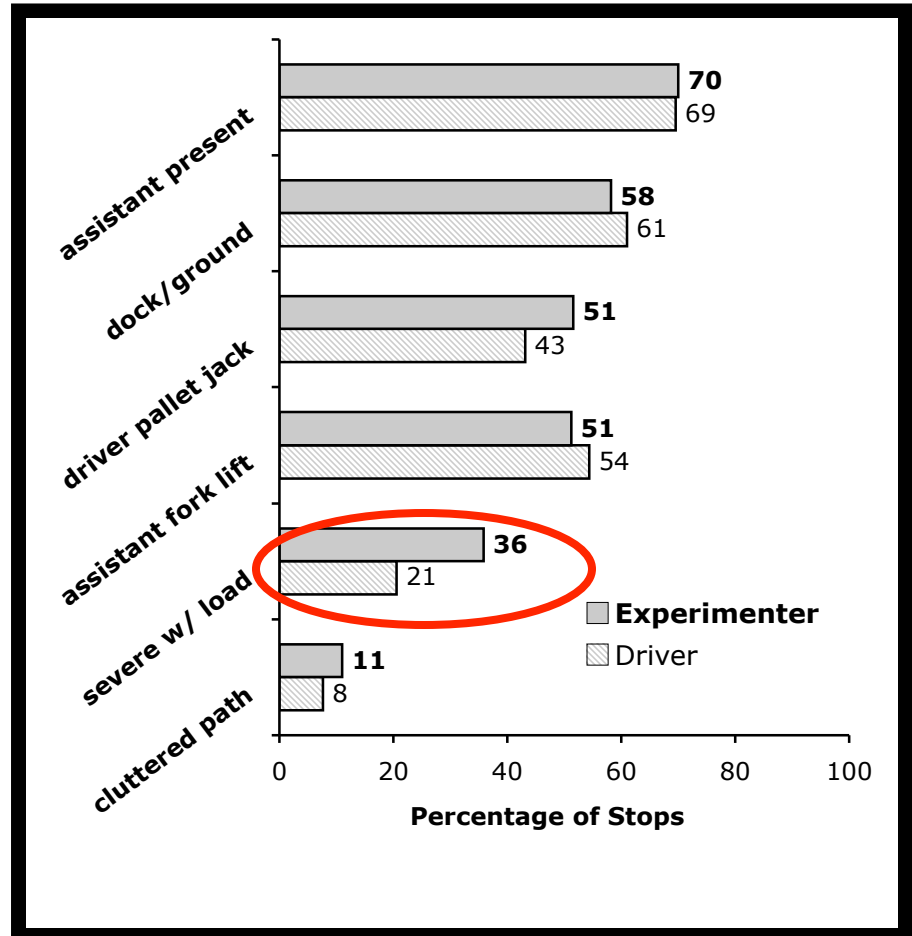


# Effectiveness Influenced by...

- Compliance
- Target behavior valence
- Motivation to change
- Concurrent response requirements
- Monitoring method and schedule
- Supplemental interventions (e.g., goal setting, feedback, & reinforcement)
- Target behavior characteristics

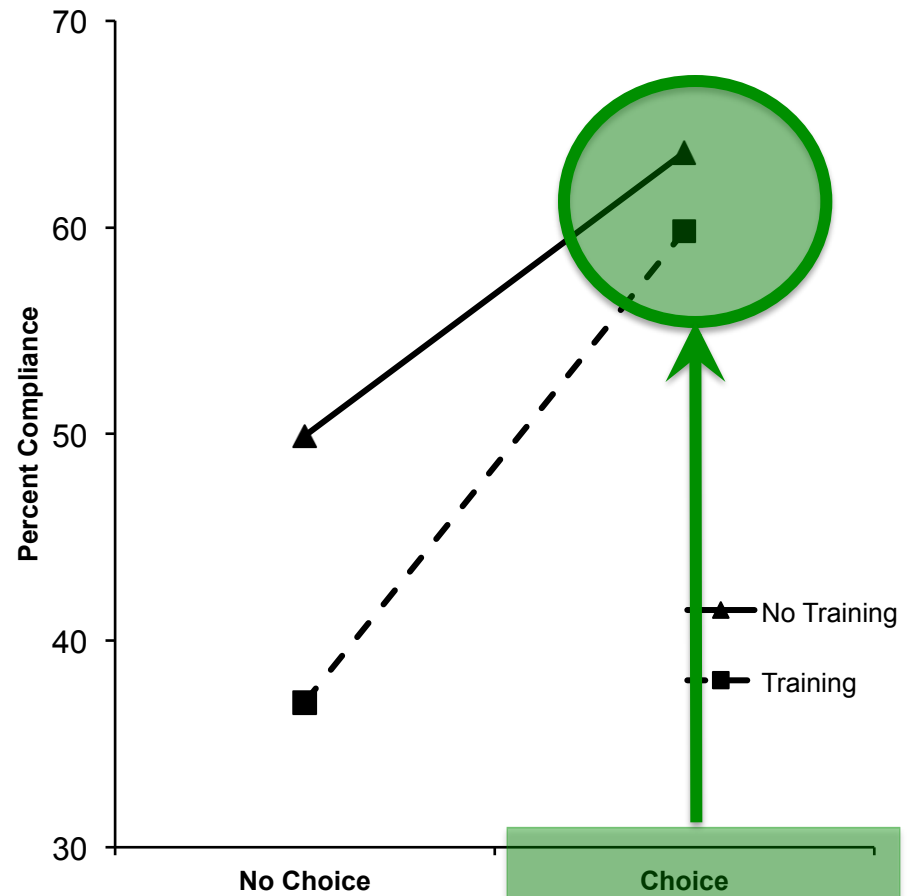
# Behavior Valence & Discrimination Skills

- Olson et al. (2009)
- Truck drivers ( $n=3$ )
- Hazard tracking checklist vs. Video ( $n=711$  stops)
  - Best for environmental context & tools ( $r = .58 - .91$ )
  - Small-moderate for severe postures ( $r = .28$ )
  - Rare events problematic ( $r = .01-.20$ )



# Target Behavior Choice

- Tell vs. Ask
- ***Ask = +18% participation***



(Olson et al., 2011)

# Current Best Practices for Treatment Applications

- Combine with other interventions
  - Validated with treatment packages
- Offer workers choice in process or target behaviors
- Enhance involvement with lottery or small incentives
- Discernable behaviors
- Implement daily for at least one week
- Choose the right behaviors
- Customize for the population

# Summary

- Self-monitoring is a potentially powerful method of self-management
  - Relatively low cost and low effort
- Variety of functions in the workplace and personal use
  - Changing behavior, transfer of training
- Several ways to increase effectiveness
  - e.g., Goal setting, offering choice, incentives

# Work, Family & Health Network

## Phase 1

- Identify supervisor behaviors that are family supportive, develop and evaluate a training and tracking intervention

	In-house survey item to assess differing workplace perceptions	Percent endorsing
<b>Supervisors</b>	<i>"I help my employees resolve conflicts between work &amp; non-work activities"</i>	<b>Close to 100%</b>
<b>Employees</b>	<i>"My supervisor helps me resolve conflicts between my work and non-work activities"</i>	<b>Close to 50%</b>



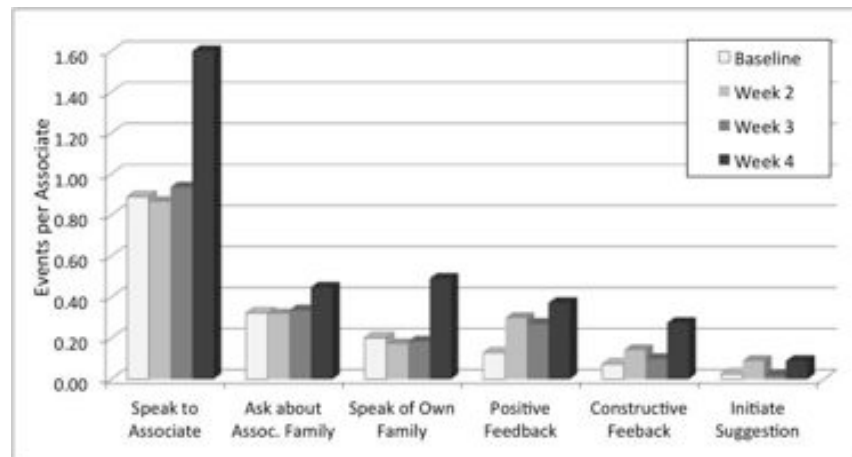
# Work, Family & Health Network Phase 1

- 12 grocery stores in the Midwest
- Early iteration of Family Supportive Supervisory Behaviors (Hammer et al., 2009)
  - Employee interactions, support, performance feedback
- 26 supervisors completed one or more days of self-monitoring

Supervisor Daily Data Collection 3x5 Card: Day _____ Date _____ Name _____
Spoke with Associate (any topic): _____
Asked something about an Associate's family: _____
Initiated a question an Associate's scheduling needs: _____
Gives positive feedback about an Associate's work performance: _____
OR _____
Gives constructive improvement feedback about an Associate's work performance: _____
Number of Associates during whole shift: _____
Record with a slash each time you accomplish one of above, eg: <del>1</del> <del>1</del> 1

# Work, Family & Health Network Phase 1

- Paper and pencil
  - Pros: Portable, low cost, not reliant on technology/tech support
  - Cons: Lacks signaling cues, lacks immediate feedback, less visually appealing, more time consuming for researchers



# Work, Family & Health Network Phase 2

- Reduce Work-Family Conflict, Improve Health
- Increase Supervisor Support
- Increase Control over Work Time



# Work, Family & Health Network Phase 2

Four-months of social and structural changes to increase support and control

- Face-to-face training (all)
  - Group interactive training sessions
  - Group **self-monitoring** activities
- weSupport training & tracking (supervisors)
  - Computer-based training and **self-monitoring**

**STAR**  
SUPPORT. TRANSFORM. ACHIEVE. RESULTS.

**START**  
SUPPORT. TRANSFORM. ACHIEVE. RESULTS. TODAY.

# Work, Family & Health Network Phase 2

## Family & Personal Support

- Functional
- Emotional
- Role Model
- Creative Management

## Performance Support

- Feedback & Coaching
- Providing Resources
- Measurement & Direction
- Support for Change



# weSupport Tracking: *iPod-iPhone App*



# Work, Family & Health Network Phase 2



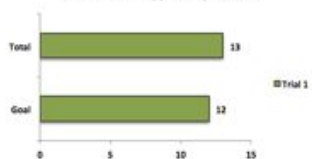
## Individual weSupport Tracking Results: Supervisor X Trial 1



### Performance Support:

In this area you excel at providing Support for Change. This will help increase employee job satisfaction at Company Name. In the future, you may want to consider whether your employees would benefit from more Measurement & Direction.

Performance Support: Supervisor X



Performance Support: Supervisor X



Overall you invested similar effort in providing and tracking Performance Support and Family and Personal Support during Trial 1. We encourage you to maintain this balance, and encourage all supervisors to strive to increase the overall levels of support they provide for employees during Trial 2.

Thanks again for participating in STAR weSupport Tracking!



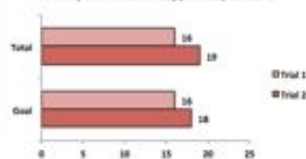
## Individual weSupport Tracking Results: Supervisor X Trial 2



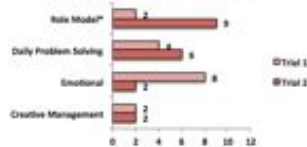
### Thank you for your effort!

You recorded 39 supportive behaviors on your iPod during Trial 2 of weSupport Tracking. Combined with Trial 1, you recorded a total of 73 supportive behaviors. Thank you for the time you spent tracking and working to increase the support you provide for the people you lead.

Family and Personal Support: Supervisor X



Family and Personal Support: Supervisor X



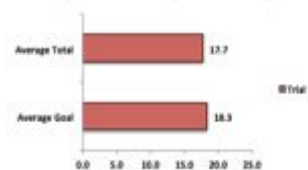
**Family and Personal Support:** In this area you increased the overall amount of Family and Personal Support that you provided for employees between Trial 1 and Trial 2. You had a decrease in the amount of Emotional support that you provided, but a large increase in the amount of Role Model support you provided in Trial 2.



## Group Results: weSupport Tracking Trial 1



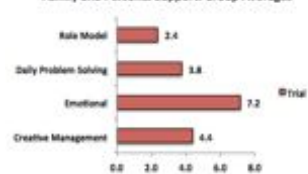
Group Goal Success: Family and Personal Support



### Thank you for your effort!

As a group, you recorded a total of 501 supportive behaviors on your iPods over the two-week period! This excellent effort shows that you really care about the people you lead.

Family and Personal Support: Group Averages



### Family and Personal Support Highlights:

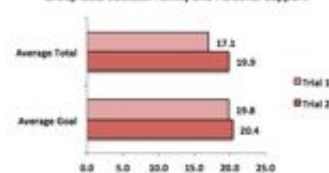
- In the area of Family and Personal Support, the group average total was 17.7 supportive behaviors. This is great, although it was just shy of the average goal of 18.3.
- The group did a good job of providing Emotional support, while Role Model support had the most room for improvement.



## Group Results: weSupport Tracking Trial 2



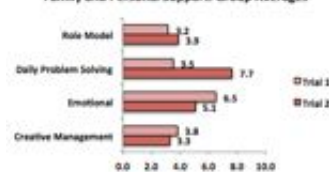
Group Goal Success: Family and Personal Support



### Thank you for your effort!

As a group, you recorded a total of 317 supportive behaviors on your iPods over the two-week period. Combined with Trial 1, you recorded over 800 supportive behaviors! Thanks for the effort and time that you put into recording your supportive behaviors.

Family and Personal Support: Group Averages

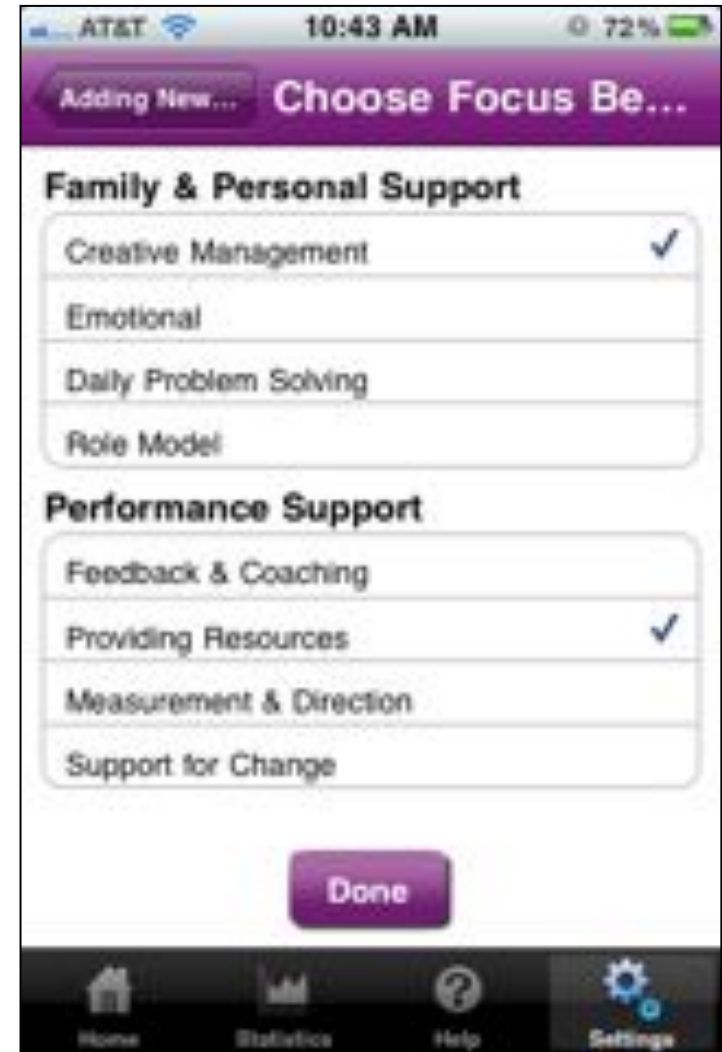


### Family and Personal Support Highlights:

- In the area of Family and Personal Support, the group average total was 19.9 supportive behaviors, which is just shy of the average group goal of 20.4 and was higher than the average total from Trial 1.
- The group did a good job of providing Daily Problem Solving during Trial 2, while Creative Management had the most room for improvement.

# Work, Family & Health Network Phase 2

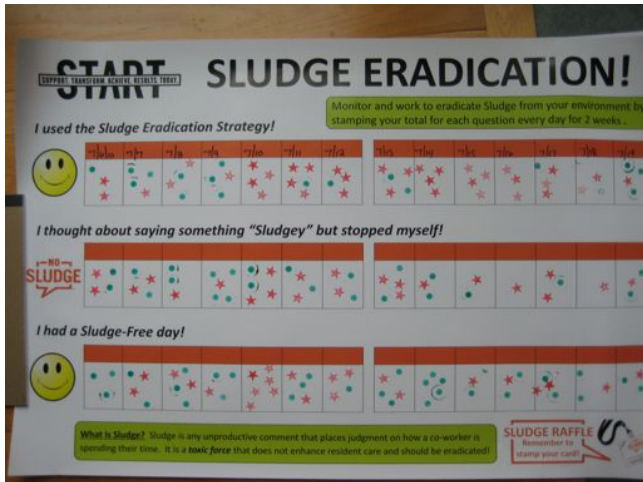
- **Methods Experiment:**  
Supervisors choose a focus behavior
- Changed between Site 1 and Site 2
- Participation **+8%**





# Work, Family & Health Network Phase 2: Group Self-Monitoring

“**Sludge** is any unproductive comment that places judgment on how a co-worker is spending his or her time. It is a toxic force that should be eradicated!”



**Sludge Eradication Poll** **STAR**  
SUPPORT TRANSFORM ACHIEVE RESULTS

**WHAT IS SLUDGE?** Sludge is any unproductive comment that places judgement on how a co-worker is spending his or her time. It is a toxic force that must be eradicated!

Take this **DAILY POLL** over the next two weeks to help your team monitor and eradicate Sludge from the work environment!

**I used the Sludge Eradication Strategy**  
(When sludged, offered help or asked if something was needed)  
# of times since last entry

**I was going to say something "Sludgy" but stopped myself**  
# of times since last entry

**I had a Sludge-free day!**  
# of days since last entry



Done

Thanks for participating!  
Please close this browser window when done viewing results.

# Work, Family & Health Network Phase 2: Group Self-Monitoring

“Workers challenged to take greater control over work time and provide more support for co-workers.”



**START**  
SUPPORT TRANSFORM ACTIVITY RESULTS TODAY

## DO SOMETHING DIFFERENT!

After you complete your Do Something Different card, stamp the poster in the control or support category. Trade cards with a coworker and keep going.


**CONTROL (Blue Cards)**

I took greater control over MY WORK TIME.  
I created a smarter/better way to care for RESIDENTS.

**SUPPORT (Red Cards)**

I gave or received FAMILY or PERSONAL support.  
I gave or received support caring for a RESIDENT.

**PARTICIPATION RAFFLE**  
Remember to stamp your card!



**SUPPORT POSTS (Red List)**  
I gave or received FAMILY or PERSONAL support. I gave or received support caring for a RESIDENT.

List Examples:  
"I will document a resident's goal or their favorite activity in their care plan."  
"I will cover a block of time when asked by a coworker once this month."

**Have you provided or received SUPPORT?**

Yes, I completed a Support Activity

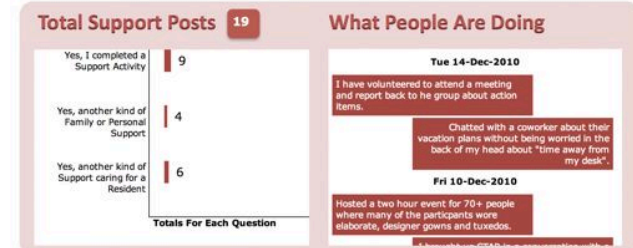
Yes, another kind of Family or Personal Support

Yes, another kind of Support caring for a Resident

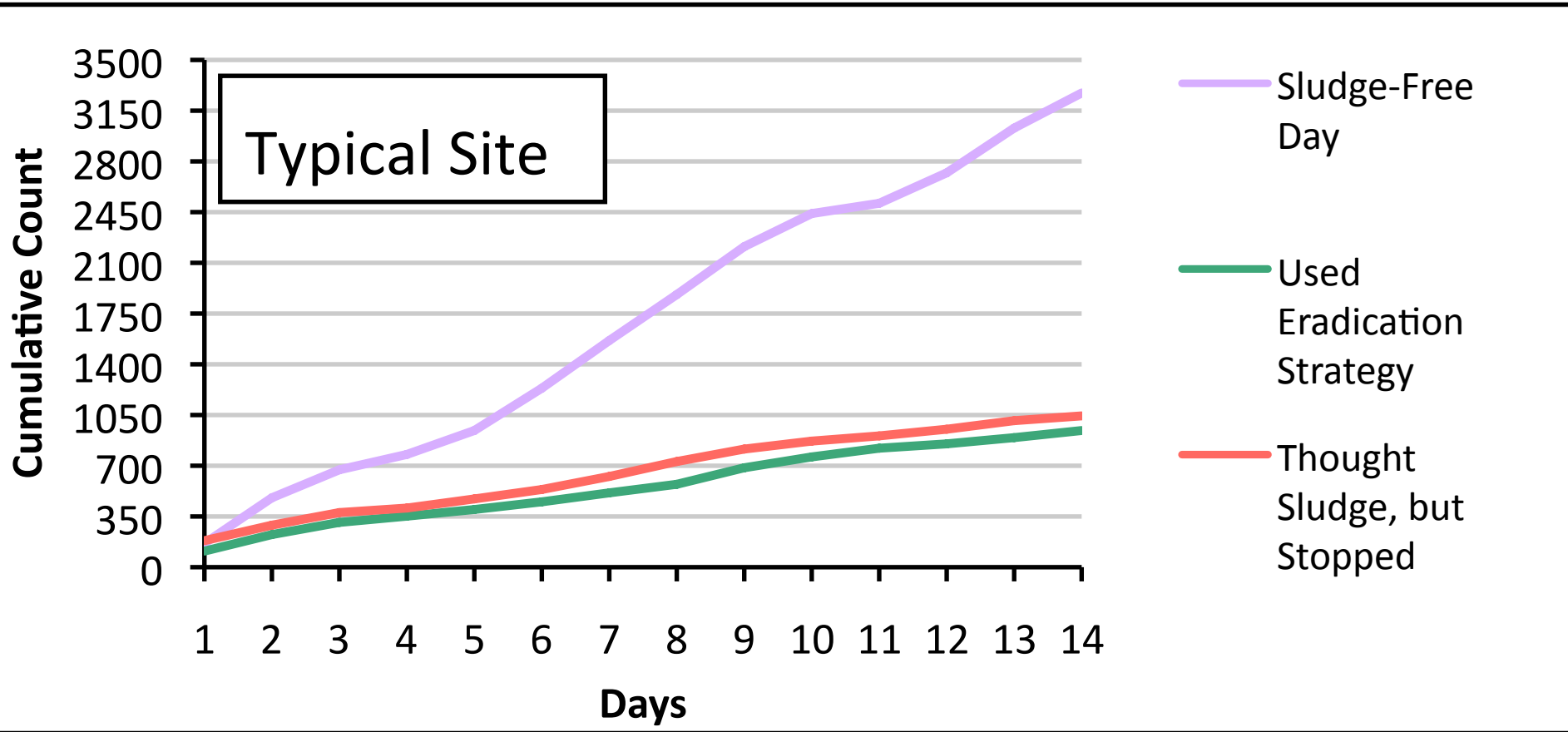
No, not yet

Please share what you did or what someone did for you.

Back Next

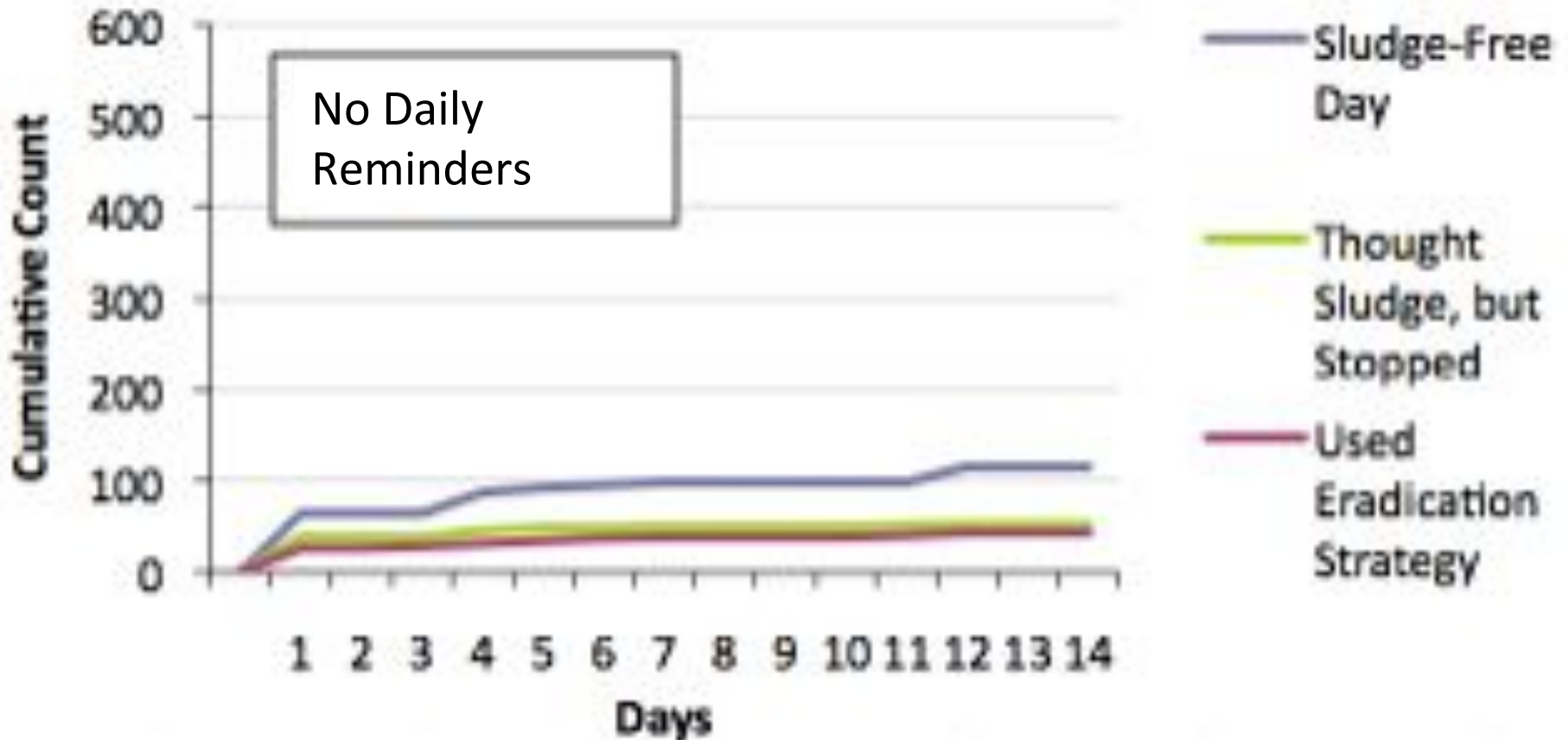


# Work, Family & Health Network Phase 2: Group Self-Monitoring



# Work, Family & Health Network Phase 2: Group Self-Monitoring

Unintended Experiment: Outlook event not repeating





# Study for Employment Retention of Veterans

- Improve health, well-being, and employment retention of Oregon Veterans
- Training supervisors to better support employed service members
- Two weeks of web-based self-monitoring





# Study for Employment Retention of Veterans

Now that you've learned about Veteran Supportive Supervision it's time to set goals and track your support for the next two weeks. Keep track of the support you provide for all of your employees, including veterans.

To set support goals we recommend multiplying the number of employees you supervise times two. This means doing two supportive things per employee per week. So, if you supervise 10 people, you could set goals of 20 for Veteran and Family Support, and 20 for Performance Support.

## Family Support

Emotional Support & Communication

Instrumental Support

Win-Win Management

Role Modeling

Save

## Performance Support

Measurement & Direction

Feedback & Coaching

Providing Resources

Health Protection

## MY PROGRESS

**Total family & personal support:**



**Total performance support:**



**Number of log submitted (5+ for certification):**





# Study for Employment Retention of Veterans

**VSST Certification**  
 Submit logs and complete Above & Beyond activities to become VSST Bronze, Silver or Gold Certified.

Bronze	Silver	Gold
Complete VSST Training, and submit 5+ logs	Obtain bronze and complete 2 Above & Beyond activities	Obtain silver and complete 4 Above & Beyond activities

**Bronze VSST**

employee job sa  
 m Silver and Go

**VSST Certification**  
 Submit logs and complete Above & Beyond activities to become VSST Bronze, Silver or Gold Certified.

Bronze	Silver	Gold
Complete VSST Training, and submit 5+ logs	Obtain bronze and complete 2 Above & Beyond activities	Obtain silver and complete 4 Above & Beyond activities



# Study for Employment Retention of Veterans

Thank you  
Behavior  
Here is how you  
compared to the

Operations			port:
<input type="checkbox"/>	<input type="text" value="Send reminder email"/>	<input type="button" value="Execute"/>	
<input type="checkbox"/>	Name	Latest activity	
<input type="checkbox"/>	wipflib	6 days 22 hours ago	15 / 30
<input type="checkbox"/>	Krista	2 months 1 week ago	2 / 1
<input type="checkbox"/>	MacKenna	2 months 1 week ago	8 / 30
<input type="checkbox"/>	Michelle	2 months 1 week ago	
<input type="checkbox"/>	Todd	2 months 6 days ago	2 / 1
<input type="checkbox"/>	Sarah H		
<input type="checkbox"/>	Scott	2 months 1 week ago	3
<input type="checkbox"/>	Rick		0
<input type="checkbox"/>	Nathan		
<input type="checkbox"/>	Monica		



# Summary

- Paper and pencil → iPod → web
  - Behaviors, definitions, examples all customized for each population
- Incorporated methods to increase participation wherever possible
  - Goal setting, choice, cues & reminders, daily process
- Variety of feedback

# Questions?



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