Lesson Plan

Initiative and Self-direction:

When to Take Initiative and When to Seek Guidance

Objective: Students will examine workplace situations and explore when it is appropriate to take initiative vs. when to seek guidance from a superior.

Workplace Readiness Skill: **Demonstrate initiative and self-direction.**

Demonstration includes

- *recognizing the importance of proactive, independent decision making*
- *identifying workplace needs*
- *completing tasks with minimal direct supervision*
- *applying solutions.*

Correlations to Other Workplace Readiness Skills:

- Demonstrate integrity.
- Demonstrate work ethic.
- Demonstrate conflict-resolution skills.
- Demonstrate customer service skills.
- Collaborate with team members.
- Demonstrate big-picture thinking.
- Demonstrate career- and life-management skills.
- Demonstrate professionalism.

Correlations to Virginia Standards of Learning (SOL):

- English: 6.RV, 6.RL, 6.RI, 6.C, 6.LU, 6.W, 7.RV, 7.RL, 7.RI, 7.C, 7.LU, 7.W, 8.RV, 8.RL, 8.RI, 8.C, 8.LU, 8.W, 9.RV, 9.RL, 9.RI, 9.C, 9.LU, 9.W, 10.RV, 10.RL, 10.RI, 10.C, 10.LU, 10.W, 11.RV, 11.RL, 11.RI, 11.C, 11.LU, 11. W, 12.RV, 12.RL, 12.RI, 12.C, 12.LU, 12.W
- History and Social Sciences: WHII.7, VUS.6, VUS.10, VUS.12, VUS.16, GOVT.1, GOVT.3, USII.1, USII.2, USII.3, USII.5, USII.8, CE.1

Instructional Steps:

1. ***Define and discuss* initiative.** *Initiative* is defined as *energy or aptitude displayed in initiation of action*. Synonyms include *drive*, *hustle*, *enterprise*, and *ambition*. Ask students why they think that employers might want workers who demonstrate initiative. Ask students for examples of how workers might demonstrate initiative.

2. ***Introduce scenarios.*** Explain to students that the class will be exploring workplace scenarios and then determining appropriate courses of action for the workers in those scenarios. Distribute the handout entitled *When to Employ Initiative*.

3. ***Read and discuss scenarios.*** Ask students to work in small groups to read through and discuss each scenario. In each, the guiding questions for the students to consider are
    a. What should the employee do?
    b. Is it always a good idea to make independent decisions in the workplace, or are there times when it is more appropriate to turn to a team member or manager?
    c. What will be the effect of the chosen action?
    d. How might the employer feel about the outcome?

4. ***Reflect on the lesson.*** Ask students to reflect in writing. Use the following prompt:
    Employers value workers who demonstrate initiative and self-direction. In what ways are these characteristics desirable, based on the discussions you had about the five scenarios? In what ways is it sometimes not appropriate to demonstrate initiative? Explain your thoughts.

Formative Assessment**:**

- Gauge student understanding throughout the small-group discussions.
- Use the *Journal Assessment Rubric* to assess student understanding of the concept as demonstrated in writing.

Options for Adaptation/Differentiation:

- To offer scaffolding to students, complete a whole-group walk-through of just one or two scenarios from the handout entitled *When to Employ Initiative*.
- To offer an extension option to students, ask them to create their own scenarios related to demonstrating initiative in the workplace.

Suggestions for Follow-up:

- Ask students to interview an adult (parent, neighbor, employer, or friend) about situations when demonstrating initiative paid off in the workplace.

Teacher Resources

- Workplace Readiness Skills (WRS) Assessment: Virginia Overview, Career and Technical Education Consortium of States (CTECS).
- Workplace Readiness Skills (WRS) for the Commonwealth: Instructional Resources, Career and Technical Education (CTE) Resource Center.

When to Employ Initiative

Use the following scenarios as a springboard for discussion about demonstrating initiative in the workplace. Consider the following questions:

- What should the employee do?
- Is it always a good idea to make independent decisions in the workplace, or are there times when it is more appropriate to turn to a team member or manager?
- What will be the effect of the chosen action?
- How might the employer feel about the outcome?

Scenario 1: Pari works at a deli. Her boss, Cheryl, has recently negotiated a new contract with a supplier. Cheryl spent months researching her options before signing on with the new supplier. A delivery is scheduled for Friday night, when Cheryl is scheduled to be off. The supplier phones on Friday afternoon because he will not be able to make the delivery. Cheryl has already left. What should Pari do?

Scenario 2: June's manager calls to let her know that he will be running late due to a family emergency. The business is supposed to open at 8:00 a.m., and the manager has booked morning client appointments at 8:30, 9:00, and 9:30. June is familiar with all these clients' projects, but is not scheduled to begin work until 10:00 a.m. What should June do?

Scenario 3: Tameka works at a retail store. An angry customer comes in with a damaged item to return. The item has no tags, the brand is not one that is familiar to Tameka, and there is no receipt. Tameka understands customer service and wants to make all the customers happy, but she is suspicious about this return. Her boss is not around. What should Tameka do?

Scenario 4: Bill works at an automotive repair shop where he is working on the engine of a 2015 Dodge Ram. A new part has been delivered but Bill sees that it is not an exact fit for that engine. Bill thinks he can use his knowledge as a mechanic to create a fix using the part. Should Bill use initiative to solve the problem, or should Bill alert his manager that the wrong part was delivered?

Scenario 5: Carlos has a new job in a law office. Carlos thinks he might want to attend law school someday. One of the firm's partners offers to walk through some aspects of a lawyer's career with Carlos, but Carlos will have to stay after work to do this and will certainly not get paid. What should Carlos do?

Demonstrating Initiative

Journal Assessment Rubric

	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Student displays conceptual understanding.	It is obvious from the writing that the student understands the concept of demonstrating initiative in the workplace.	The student demonstrates an understanding of most of the concept of demonstrating initiative in the workplace.	Student understanding is spotty or unclear; student partially grasps the concept of demonstrating initiative in the workplace.	The student did not demonstrate a conceptual understanding.
Written ideas are fully formed.	Ideas within the journal are developed and clear to the reader.	Ideas within the journal are somewhat developed and clear to the reader.	Ideas within the journal are incomplete or unclear to the reader.	Ideas within the journal are not developed.
Writing is organized and clear.	Student journal is organized in paragraphs and clearly conveys all ideas.	Student journal is somewhat organized in paragraphs and conveys most ideas.	Student journal requires additional organization and attention to detail.	Student journal is not organized and does not convey ideas.
Student uses good vocabulary and language choices.	Choice of vocabulary is specific, professional, and appropriate to the audience (teacher).	Choice of vocabulary is somewhat specific, professional, and appropriate to the audience (teacher).	Choice of vocabulary needs to be improved so that it is specific, professional, and appropriate to the audience (teacher). Some slang or simplistic words should be replaced.	Choice of vocabulary is not specific, professional, and appropriate to the audience (teacher). Slang or simplistic words replace those that would better convey student ideas.
Student attends to grammar, spelling, capitalization, and punctuation.	There are no grammar, spelling, capitalization, or punctuation errors.	There is one grammar, spelling, capitalization, or punctuation error.	There are two grammar, spelling, capitalization, or punctuation errors.	There are more than two grammar, spelling, capitalization, or punctuation errors.