301
Effective Interviewing in the Case Planning Process: Skills for Promoting Engagement and Change

A Training Outline

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301: Effective Interviewing in the Case Planning Process: Skills for Promoting Engagement & Change

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An Overview of the Curriculum

Rationale:

Interviewing is the essential medium through which much of child welfare work is done. It is through the professional interview that the worker conveys the mission and values of child welfare, gathers and gives information, forms and maintains the protective partnership with the client and others, and helps the client move forward in resolving obstacles to providing adequate child safety, permanence, and well-being for the child.

Therefore, child welfare professionals must have and demonstrate an effective level of knowledge and skill in regards to:

- the purpose and structure of an effective interview,
- the relationship of the interview to helping service models,
- adapting the interview to the requirements of different practice contexts, and
- selecting and integrating various interviewing skills,

in order to accomplish purposeful outcomes in each individual interview and throughout the life of the case.

Competency:

301-3 The Child Welfare Professional is skilled in a variety of interviewing and casework techniques, and can conduct individual and family interviews.

301-4 The Child Welfare Professional can implement problem-solving strategies, can apply these strategies to family's problems and needs, and can teach family members to use problem-solving methods to resolve family problems.

Learning Objectives:

Participants will be able to:

- ➢ Identify the elements of and requirements for a professional interview.
- ➢ Demonstrate giving effective feedback to colleagues and clients.
- ➢ Identify the interviewing skills associated with the Interaction Helping Model and the Solution-Focused Approach.
- ➢ Apply strategies and skills from the helping model in interviewing angry and difficult clients.
- ➢ Identify how changes in work context influence the application of interviewing skills.
- ➢ Demonstrate interviewing skills associated with the investigative and helping functions in casework practice.

An Overview of the Curriculum (continued)

Length of Workshop:

12 Hours

Materials Needed to Present Workshop:

- Color markers
- Name tents
- Idea Catchers
- Overhead projector and screen
- Easel stands
- Two blank easel pads (preferably Post It pad with self stick adhesive on back)
- Curriculum with transparencies
- Handouts for participation

Target Audience:

Child Welfare Caseworkers and Supervisors and Private Providers who have completed either CORE prior to the Revised CORE Charting the Course, who have at least six months of direct service experience and who are looking for new interviewing skills and strategies and more effective application of existing skills to better engage clients and promote collaboration and change. The target audience should be limited to no more than 15 participants so that practice sessions may be completed and processed.

Summary:

It is through the professional interview that the worker conveys the mission and values of child welfare, gathers and gives information, forms and maintains the protective partnership with the client and others, and helps the client move forward in resolving obstacles to providing adequate child safety, permanence, and well-being for the child. Child welfare professionals must have and demonstrate an effective level of knowledge and skill in regards to:

- the purpose and structure of an effective interview,
- the relationship of the interview to helping service models,
- adapting the interview to the requirements of different practice contexts, and
- selecting and integrating various interviewing skills.

This workshop is intended for Child Welfare Caseworkers, Supervisors, and Private Providers who have completed either CORE prior to the Revised CORE Charting the Course, who have at least six months of direct service experience and who are looking to increase their interviewing effectiveness in engaging their clients, overcoming barriers and promoting change.

An Overview of the Curriculum (continued)

Expectations of the Trainer:

The trainer should be a skilled child welfare practitioner who is knowledgeable about various interviewing skills and their application in a variety of practice contexts. The trainer should also be familiar with the Interactional Helping Model, the Solution-Focused Approach, the Child and Family Services Review and its outcomes, and the Pennsylvania Best Practice Standards for Child Welfare Practice.

Shulman Interactional Helping Skills

Tuning in to self
Tuning in to the client and others
Tuning in to the specific environmental situation
Clarifying purpose, function and role
Dealing with issues of authority
Reaching for feedback (understanding and feelings)
Displaying understanding of the client's feelings
Putting the client's feelings into words
Focused listening
Confrontation
Providing relevant data
Questioning
Containment
Summarizing
Identifying next steps

Solution-Focused Skills

Exploring for strengths
Complimenting
Exploring for exceptions
Scaling questions
Amplifying goals
Giving Feedback
Identifying next steps

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Day I

Estimated Time	Content	Page
15 minutes	Section I: Brief Introductions & Workshop overview	6-8
15 minutes	Section II: Effective Feedback	9-11
45 minutes	Section III: Introductory Interview Skills & Practice; clarifying workshop needs and expectations	12-15
15 minutes	BREAK	
45 minutes	Section IV: Value & Practice Frameworks for effective interviewing • Strengths-based values: Saleeby • 3 elements of the professional interview • Interactional Helping Model	16-21
45 minutes	Section V: More Interviewing Skills defined and demonstrated	22-24
60 minutes	LUNCH	
60 minutes	Section VI: Interactional Skills Practice	25-27
15 minutes	BREAK	
60 minutes	Section VII: Interviewing the Angry & Resistant Client (Explanation & Demonstration)	28-31
45 minutes	Section VIII: Review &Transfer of Learning: Day I	32-33

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Day II

Estimated Time	Content	Page
15 minutes	Section IX: Re-engagement and Review of Agenda for Day II	34-35
60 minutes	Section X: Interviewing contexts • The culture context • Assessment & Helping contexts	36-40
15 minutes	BREAK	
90 minutes	Section XI: Assessment Skills: Demonstration & Practice	41-44
60 minutes	LUNCH	
30 minutes	Section XII: Middle/Work Phase: Helping Skills	45-46
40 minutes	Section XIII: Solution-Focused Approach to Helping	47-51
15 minutes	BREAK	
50 minutes	Section XIV: A Change I Want to Make	52-53
30 minutes	Section XV: Transfer of Learning: Action Plan	54-55
15 minutes	Section XVI: Review, Evaluation & Closing	56-57

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Day I – A.M.

Section I: Introductions & Workshop Overview

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the rationale, learning objectives, and agenda for the workshop.
- ✓ Identify other participants by name, agency, function, and experience in the field.

Method of Presentation:
Lecture, individual, and group activity

Materials Needed:
- Name tents, markers and stickers
- Idea catchers
- Name tags
- **Overhead #1 (Learning Objectives & Competencies)**
- **Overhead #2 (Agenda)**
- **Handout #1 (Idea Catcher)**
- **Handout #2 (Learning Objectives & Competencies)**
- **Handout #3 (Agenda)**

Resources Used:
None

PA Standards:

CFSR Issues:

Interactional Helping Skills:
Beginning Phase
Clarification of Purpose

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Section I: Introductions & Workshop Overview

Outline of Presentation:

Pre-training setup:
Arrange seating around round tables, four to six participants at each table. Prepare the training room by placing name tents, markers, learning objectives, agenda, and **Handout #1 (Idea Catcher)** handouts on each table.

Arrange two flip charts with easels on either side of overhead projector / screen at the front of the room. The trainer should prepare some “wall charts” to be used later entitled as follows:

- ✓ “Challenging interviewing situations I would like to manage better”
- ✓ “A strength I bring to this workshop is…”
- ✓ “Parking Lot”.

Note: Trainer may elect to play music prior to the training and at all breaks.

Step 1: Lecture
Trainer introduces self and welcomes participants to the training.

Step 2: Lecture
Trainer reviews the rationale, learning objectives and agenda for the workshop using **Overheads #1 (Learning Objectives & Competencies) and Overhead #2 (Agenda),** and referring the participants to the corresponding **Handout #2 (Learning Objectives & Competencies) and Handout # 3 (Agenda).**

Step 3: Lecture
Trainer reviews the rules for the training program including the 15-minute rule and training credits for the workshop. Trainer also informs participants about the schedule for the day, emergency exit, and restroom locations, requests that cell phones be turned off or the vibration option be selected and informs participants of any other trainer-specific guidelines.

Trainer explains the history behind the development of this workshop.

> “This training came about as the result of development work on the New CORE Curriculum, Charting the Course to Excellence. One of the goals of that curriculum is to make training more skills focused. Early pilots of the interviewing material indicated that child welfare workers were very good at gathering information and directing clients to use various services offered by the agency.

Section I: Introductions & Workshop Overview (continued)

Step 3 (continued):

However, child welfare practitioners regardless of the years of experience or position were not as effective in using interviews to engage their clients, to identify and use client strengths, or to work with clients in a collaborative partnership to promote needed change.

While interviewing skills training has been incorporated into the New CORE Curriculum, there was no equivalent training for experienced workers who completed the existing CORE curriculum.

This workshop is a response to the need for a more skill-oriented training to help experienced workers to build on their existing knowledge and skills, apply those skills and new ones in a more deliberate, conscious way and to have an opportunity to learn strategies for interviewing and working with the more challenging clients encountered in their practice.

Some parts of this training may include familiar material that will reinforce existing knowledge and skills and serve to form a common base for later content and skills. Other material will take existing skills to a higher level or impart new knowledge and skills. The hope is that those taking this workshop will be able to translate the material into more effective client engagement and outcomes in the field and greater professional satisfaction."

Step 4: Individual activity.

Trainer instructs participants to complete a name tent using the markers provided. Participants are to list their name and county/agency, function/role and years of experience in the field of serving families and children. Trainer then asks participants to introduce themselves individually and to share the information from their name tents.

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Section II: Effective Feedback

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
✓ Identify the purpose and components of effective feedback.

Method of Presentation:
Lecture

Materials Needed:
- ✓ **Overhead #3 (Effective Feedback)**
- ✓ **Overhead #4 (Types of Feedback)**
- ✓ **Handout #4 (Effective Feedback)**

Resources Used:
None

PA Standards:
None

CFSR Issues:
None

Interactional Helping Skills:
None

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Section II: Effective Feedback

Outline of Presentation:

Trainer explains that throughout the two-day workshop there will be opportunities for participants to practice the skills presented and to make observations on interview examples and the practice attempts of colleagues. In order to maximize learning, it is important for participants in the role of observers to give feedback to each other on their attempts to demonstrate various interview skills. In order for the feedback to be effective, participants need to understand and practice the guidelines for effective feedback.

Step 1: Lecture
Trainer explains that throughout the two-day workshop there will be opportunities for participants to practice the skills presented and to make observations on interview examples and the practice attempts of colleagues. In order to maximize learning, it is important for participants in the role of observers to give feedback to each other on their attempts to demonstrate various interview skills. In order for the feedback to be effective, participants need to understand and practice the guidelines for effective feedback.

Step 2: Lecture
Using **Overhead #3 (Effective Feedback)** and **Handout #4 (Effective Feedback)**, the trainer explains the requirements for effective feedback. These guidelines include the following elements:

- ✓ Targets the key skills: Each practice session will have an assessment of particular skills needed to perform a step or outcome in the interviewing process.
- ✓ Is individualized, i.e., each participant has the opportunity to talk about their demonstration and will receive feedback about his/her practice by a peer observer.
- ✓ Helps each participant integrate knowledge, cognitive strategies, values, and behaviors.
- ✓ Are both oral and written using observation forms to be provided?

Using **Overhead #4 (Types of Feedback)** and referencing **Handout #4 (Effective Feedback)** the trainer explains that there are two components to effective feedback. They are as follows:

- ✓ **Motivational** (recognizes what the practitioner did well in meeting the objectives of the exercise) and

- ✓ **Constructive** (offers suggestions for improvement and strategies that can be implemented on the job).

Section II: Effective Feedback (continued)

Step 2 (continued):
Trainer clarifies that practice and feedback require participants to be brave enough to risk experiencing skill areas where they may not be as proficient as they would hope to be, as well as experiencing expected levels of performance. In order to create a safe environment for practice and the giving and receiving of feedback, participants need to treat the observations and information shared in this workshop as confidential.

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Section III: Introductory Interview Skills & Practice

Estimated Length of Time:
45 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the required elements of the introductory interview.
- ✓ Identify the skills to be used in a sample interview.
- ✓ Demonstrate selected skills in a partner practice interview.
- ✓ Demonstrate giving effective feedback.
- ✓ Identify individual training needs.

Method of Presentation:
Lecture, partner interviews, and group discussion

Materials Needed:
- ✓ **Overhead #5 (Guidelines for the Introductory Interview)**
- ✓ **Overhead #6 (List of Introductory Skills)**
- ✓ **Handout #5 (Guidelines for the Introductory Interview)**
- ✓ **Handout #6 (Introductory Skills Defined)**
- ✓ **Handout #7 (Introductory Interview Feedback Form)**
- ✓ **Handout #8 (Introductory Skills Demonstration [script])**

Resources Used:
Shulman, Lawrence. The Skills of Helping Individuals, Families, Group and Communities (Fourth Edition)

PA Standards:
I. Assessment - Produce Family Focused Assessment. Outcome: Permanence. E. 1a), 1b)

CFSR Issues:
None

Interactional Helping Skills:
Focused listening
Containment
Questioning
Displaying understanding of client feelings
Summarizing
Reaching for Feedback
Giving feedback

Section III: Introductory Interview Skills & Practice (continued)

Outline of Presentation:
The trainer will define introductory skills to participants, then demonstrate those skills, and finally have participants practice those skills in pair interviews.

Step 1: Lecture
The trainer explains that the group will begin skills practice by identifying several key skills to be used in an interview demonstration, then practicing those skills in brief partner interviews intended to gather relevant information about each other. These same skills will be used in client interviews. Participants will also practice giving and receiving feedback following each interview.

Step 2: Lecture
Using **Overheads #6 (List of Introductory Skill),** and **Handout # 6** (**Introductory Skills Defined),** the trainer defines and explains the following skills and their relevance for casework practice:

- ✓ **Focused listening:** Attempting to concentrate on a specific part of a message and to search for connections when they are not readily apparent.

  Relevance to practice: increases the likelihood of worker understanding of the client, and worker awareness of what the worker might do or say next to maintain engagement and to maintain relevant interview flow.

- ✓ **Containment:** The helping professional's ability to contain himself/herself – not acting – in order for another to be able to tell their whole "story" before the worker attempts to "help."

  Relevance to practice: helps the worker to maintain concentration on the client's issues and to avoid introducing extraneous information or non-relevant sharing of worker experience related to the problem/situation. The interview is about the client, not the worker.

> **Trainer Note:** Some believe that the worker sharing personal stories, experiences and solutions helps to humanize the worker and helps in building the worker/client relationship. However, the Interactional Helping Model and Solution-Focused Model argue that the interjection of worker personal experiences and solutions can block the client's own solution-finding process based on the client's unique situation and set of circumstances, skills, and resources.

Section III: Introductory Interview Skills & Practice (continued)

Step 2 (continued):

- ✓ **Questioning:** Making requests for more information as to the nature of the problem/situation to get a fuller picture of the concern expressed. Questions may be more open-ended or more narrowly focused, requiring a forced choice and/or yes/no answers or closed-ended requiring specific information such as a birth date or address.

  Relevance to practice: helps the worker to develop a more complete and accurate understanding of the problem and/or the situation.

- ✓ **Displaying understanding of client feelings:** Non-verbal and verbal communication aimed at demonstrating; that the helping professional comprehends the client's thoughts and feelings. This skill is often referred to as active listening or reflective listening.

  Relevance to practice: helps the client to feel understood and promotes engagement and the protective partnership.

- ✓ **Summarizing:** Helping someone to identify the main themes of the discussion during a session/meeting. Summarizing can be used at different points in the interview to close one segment and transition to another, and at the end of the interview.

  Relevance to practice: creates the opportunity for both the worker and client to understand and agree upon the content and meaning of the session or interview segment and the implications for next steps.

- ✓ **Giving feedback:** Observations about what the client has done successfully related to the task at hand and offering suggestions for improvement or future work.

  Relevance to practice: helps the worker and client in building trust, in reinforcing useful strengths and in identifying requirements for further work.

Step 3: Demonstration and large group activity/discussion
The trainer distributes **Handout #7 (Introductory Interview Feedback Form)** to each of the participants. The trainer explains that the participants will be conducting a similar interview following viewing and processing of the demonstration interview using the copy of the Introductory Feedback Form.

Section III: Introductory Interview Skills & Practice (continued)

Step 3 (continued):
The trainer then demonstrates the above skills, using **Handout #8 (Introductory Skills Demonstration)**. Following the demonstration interview, the trainer solicits participant observations about the effective use of the skills presented in the demonstration. The trainer offers feedback to the participants about the accuracy of their observations regarding skill identification and usage, including the trainer's failure to use containment at one point in the interview

Trainer should make particular note of the examples of displaying understanding, of client feelings since this skill is an important way in which the interviewer conveys to the client that the client understands the client's words, feelings, and meaning. These reflective responses by the worker also help to avoid the interview sounding like an interrogation wherein the worker seems interested only in "harvesting" information from the client. Feedback and summarization should also be highlighted.

Step 4: Pairs Activity
The trainer then instructs the participants to form pairs, preferably with someone who they do not know or do not know well. The participants are instructed to conduct an interview of about five minutes using **Handout #5 (Guidelines for the Introductory Interview),** followed by the giving of feedback. The trainer displays **Overhead #5 (Guidelines for the Introductory Interview)** during the activity as a reference. For this exercise, the interviewer and the interviewee complete **Handout #7 (Introductory Interview Feedback Form)** together. The interviewer and interviewee reverse roles and repeat the interview and giving of feedback.

The trainer then processes the exercise noting what skills were easier to demonstrate, and which ones may have been more difficult. Trainer asks for specific examples of displaying understanding of client feelings produced by the participants in the partner interviews. The trainer reminds the participants that these same skills will be practiced and processed with work-related scenarios and more skills added.

Step 5:
At the conclusion of the interviews, the participants are instructed to visit the flipchart pages that the trainer posted on the wall prior to the beginning of the workshop and enter their "Challenging interviewing situations I would like to manage better" and "A strength I bring to this workshop is…" Trainer briefly reviews participant responses on the wall charts. Those participant needs that will likely not be addressed in training are listed on the "Parking Lot" page by the trainer.

BREAK. This may be an appropriate time to take the 15-minute morning break.

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Section IV: Value & Practice Frameworks for Effective Interviewing

Estimated Length of Time:
45 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the values associated with strengths-based practice.
- ✓ Identify the elements of and requirements for a professional interview.
- ✓ Identify the phases that comprise the Shulman Interactional Helping Model.
- ✓ Identify the eight steps of the professional interview in the context of the Interactional Model.

Method of Presentation:
Lecture and large group discussion

Materials Needed:
- **Overhead #7 (Strength-Based Practice Values: Saleeby)**
- **Overhead #8 (The Professional Interview: Elements and Requirements)**
- **Overhead #9 (The Four Phases of the Interactional Helping Model)**
- **Overhead #10 (The Four Phases, Steps, & Considerations)**
- **Handout #9 (The Professional Interview: Elements and Requirements)**
- **Handout #10 (The Interactional Helping Model)**

Resources Used:

Saleeby, Dennis (1997). The Strengths Perspective in Social Work Practice. New York: Longman Publishers, Inc.
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
I. Assessment- Produce Family Focused Assessment. Outcome: Permanence E. 1a)

CFSR Issues:

Interactional Helping Skills:
The Four Phases of the Helping Model

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Section IV: Value & Practice Frameworks for Effective Interviewing

Outline of Presentation:
The trainer explains that the purpose of this section is to provide participants with a logical framework to guide the worker through the strengths-based, solution-building process with clients. The framework includes an understanding of the foundational values and practice models of the strength-based approach.

Step 1:
Using **Overhead #7, (Strength-Based Practice Values: Saleeby)** the trainer presents the value base for the strengths-based approach to helping articulated by Dennis Saleebey in 1992.

1. Despite life's struggles, all persons possess strengths that can be marshaled to improve the quality of their lives. Practitioners need to respect these strengths and the direction clients wish to apply them.
2. Client motivation is increased by a consistent emphasis on client-defined strengths.
3. Discovering strengths requires a process of cooperative exploration between clients and helpers.
4. Focusing on strengths turns practitioners away from the temptation to judge or blame clients for their difficulties and toward discovering how clients have managed to survive.
5. All environments – even the most bleak – contain resources.

Step 2: Small Group Discussion/Large Group Processing
At this point, the trainer asks participants to consider the above practice values and to first assess their level of agreement or disagreement with the values presented, and then how agreement or disagreement might influence their work with clients. The trainer then conducts a large group discussion around the participant responses.

At the end of the large group discussion, the trainer notes that there is not any right or wrong conclusion to be drawn from participant discussion or beliefs. The key point is that values influence behavior including the way in which the worker approaches, engages, and works with the client. If a worker has a tendency to embrace the values, the worker will seek to discover strengths during interviews and will tend to be more optimistic about client potential for change and focus more on developing and using a collaborative approach with the client. The less the worker embraces the above values, the less optimistic the worker might be about change and the greater the tendency to be more directive and authoritative with the client.

The trainer adds that the more the client, with worker help, is able to identify and practice what is right about the client and the clients parenting, the less prominent will be the problem behaviors. This requires the worker to know what questions to ask to discover strengths and what to say and do to reinforce and use those strengths.

Section IV: Value & Practice Frameworks for Effective Interviewing (continued)

Step 3: Lecture
The Shulman Interactional Helping Model and the Solution-Focused approach are two models widely used in child welfare and human services in general. The Shulman Interactional Helping Model is presented first. The Solution-Focused approach will be presented in Day II. These models become effective through the professional interview and the timely application of a variety of interviewing skills. Interviewing skills are the tools that the worker uses to move through the helping process and to collaboratively create positive outcomes consistent with the mission of child welfare.

Using **Overhead #8, (The Professional Interview: Elements and Requirements)** and **Handout #9,** (**The Professional Interview: Elements and Requirements)** the trainer presents the three requirements of the professional interview which are to:

- ✓ Gather and give information;
- ✓ Initiate and maintain positive client engagement; and,
- ✓ Initiate and sustain movement toward identified goals and outcomes.

The trainer notes that all three elements of the professional interview must be present in every interview. The professional interview is a purposeful interaction with the client, not a casual conversation. If the worker is having a contact with a client and the above elements are not present, the worker is probably having a ***conversation*** with the client rather than a professional interview. Trainer comments that often caseworkers are strong in the first requirement but tend to place much less emphasis on the second and third requirements.

Step 4: Lecture
The trainer explains that the professional interview is the purposeful medium or tool through which the worker moves through the phases and steps in practice models useful in child welfare. Lawrence Shulman, PhD. developed the Shulman Interactional Helping Model presented here. This model places high value on building and maintaining the worker/client collaborative partnership.

Trainer Note: The Shulman Interactional Helping Model presupposes that child safety has been assured before the worker moves into the helping stage of service. However, many of the skills used in the helping models are equally effective in investigative and assessment stages in the casework process.

Section IV: Value & Practice Frameworks for Effective Interviewing (continued)

Step 4 (continued):
The trainer then presents the Shulman Interactional Helping Model displaying **Overhead #9 (The Four Phases of the Interactional Helping Model).** Trainer explains that every interview and every case includes these four phases: Preparation, Beginning, Middle, and End. Each of the phases have certain requirements that when met are more likely to produce a helping effect with clients.

Trainer displays **Overhead #10 (The Four Phases, Steps & Considerations)** and distributes **Handout #10 (The Interactional Helping Model).** The phases of the model are presented in conjunction with the related steps and considerations (bullets) in the interview process.

Trainer Note: On newsprint titled "The Shulman Interactional Helping Model," list the four phases by title, i.e. Preliminary, Beginning/Engagement, Middle/Work, and Ending/Transition. On another sheet on newsprint entitled, "8 Key Steps in the Professional Interview," list the names of the eight steps that are presented below. These two newsprint pages should be posted side by side in the training room for reference throughout the workshop.

Preliminary/Preparation Phase-the phase of work prior to the worker engaging with the client. Purposes of this phase are to develop a preliminary empathy about the client's issues and concerns; to create the opportunity for the worker to explore personal attitudes, feelings, and beliefs about the client/case situation that might interfere with the intervention/helping process; and to identify supports and resources that the worker may need to accomplish the purposes of the interview and to assure worker and client safety.

Key steps and considerations in the Preliminary Phase:

<u>Preparation for the interview</u>

- Tuning-in to Self: worker is in touch with own feelings about the client and the upcoming interview.
- Tuning-in to Others: worker is in touch with how the client might feel about the upcoming interview.
- Worker is clear about the outcomes that need to be achieved.
- Safety issues have been identified, planned for, and necessary supports (supervisor; coworker; police) are in place.
- Check for what factors may be operating to help or hinder the interview (personal feelings or fears; presumptions; client physical or mental impairment; cultural considerations, workload, etc.)

Section IV: Value & Practice Frameworks for Effective Interviewing (continued)

Step 4 (continued):
Beginning/Engagement Phase-the beginning or engagement phase of work is the phase during which the worker contracts with the client by clarifying the purpose of the agency involvement or the session, the role he or she will play, and by reaching for client feedback on the content of the work. Authority issues are also dealt with in this phase.
Key steps and considerations in the Beginning Phase:

Greeting and engaging the person with respect
- Words and actions are compatible with the client's culture and the situation.

Setting a clear purpose
- Purpose statement is clear, using non-jargon and is consistent with the outcomes worker hopes to achieve.

Identifying the agency and family goals,
- Explanation of worker goals offered in terms the client will understand.
- Worker listens and is open to the client's needs, goals, and perspective.

Developing a clear "contract" for change
- Worker and client negotiate agreement to continue the interview or work.
- The plan developed for work/change is realistic and consistent with the agency mission and goals, and includes the input, needs, and goals of the client.
- There are adequate client, agency, and community resources to support the plan.
- The client is in agreement with this plan.
- The client is committed to working the plan to achieve the goals.
- The level of protective authority used to secure client cooperation is the least amount necessary to move the plan forward.

Middle/Work/On-going Phase-the phase of work in which the client and the worker focus on dealing with issues raised in the contracting phase (or new issues that have emerged).

Key steps and considerations in the Middle Phase:

Helping the family make the desired changes
- The right strategies and skills are employed to facilitate the plan.
- Connections to resources are identified and made.
- The level of protective authority required to sustain the work is appropriate or adjusted to move the plan forward.
- Worker checks for evidence that a genuine protective/collaborative partnership exists between the worker and client.

Section IV: Value & Practice Frameworks for Effective Interviewing (continued)

Step 4 (continued):
Ending/Transition Phase-the termination of the work phase, in which the worker prepares to end the interview session or the relationship with the client if the case is being closed or transferred. The purposes are to help the client and worker review their work together as well as to prepare for transitions to the next interview session or new experiences beyond this specific worker/client relationship.

Key steps and considerations in the Ending Phase:

Closing the process and evaluating outcomes

- Worker includes feedback about client strengths in the summarization of the interview or the case closing interview.
- The client is given an opportunity to validate or challenge worker perceptions of the interview or case process and outcomes.
- Assessment of progress and outcomes has been done using reliable measures.
- Worker clearly articulates next steps.

Documenting the interview in writing

- Documentation is done promptly.
- The facts of the interview have been accurately, clearly, and concisely represented.
- Documentation includes assessment and conclusions regarding safety.

These phases operate at the level of each individual interview session with the client as well as throughout the life of the case, forming the framework for the entire helping process. The eight steps may unfold somewhat differently depending on the specific purpose of the interview. In all cases the interview requires planning, clarity about the necessary outcomes for the case and each session, a command of essential skills and a willingness on the part of the worker to engage the client and others as partners in the process of assuring child safety, permanence and family well-being. Trainer notes that these phases and steps are basically a common sense framework to guide the worker through each interview and through the life of the case.

Step 5: Large Group Discussion
At the conclusion of the presentation, the trainer suggests that the participants use the phases and steps as a checklist to assess what phases and steps they are already doing consistently or well and what phases and steps may be targets for improvement. Trainer asks for feedback about the usefulness of this framework and solicits comments about which phases and steps the participants more typically do and which ones are done less consistently.

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Section V: More Interviewing Skills Defined and Demonstrated

Estimated Length of Time:
45 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the additional skills associated with the Interactional Helping Model.
- ✓ Demonstrate the use of selected skills.

Method of Presentation:
Lecture, individual and small group activity; large group discussion

Materials Needed:
- ✓ **Overhead #11 (Skills Associated with the Interactional Helping Model)**
- ✓ **Handout #11 (Skills Associated with the Interactional Helping Model)**

Resources Used:
Shulman, Lawrence (1999). <u>The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition).</u> Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
I. Assessment – Conduct Risk Assessment. Outcome: Safety. B. 1e)
II. Service Planning – Meet Concrete Needs. Outcome: Safety and Well-being. I. 1.e)

CFSR Issues:
None

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the specific environmental situation
Clarifying purpose
Dealing with issues of authority
Reaching for feedback
Reaching for feelings
Putting the client's feelings into words
Confrontation
Providing relevant data
Identifying next steps

Section V: More Interviewing Skills Defined and Demonstrated

Outline of Presentation:

Trainer explains that the group will continue skill development through the introduction of additional key interviewing skills giving examples of the usage of selected skills. The relationship of the new skills to the interview phases is also presented. Later, participants will be demonstrating and practicing these same skills. These skills will be reinforced throughout the training in later practice opportunities.

Step 1:
Trainer distributes **Handout #11 (Skills Associated with the Interactional Model).** Referring to **Part A: Definitions** of the handout and displaying **Overhead #11 (Skills Associated with the Interactional Model),** the trainer defines and explains the skills listed on the handout and their relevance to casework practice.

Step 2:
Trainer refers the participants to **Handout #11 (Skills Associated with the Interactional Model) Part B: Skill Practice.** Trainer instructs the participants to first write a clear purpose statement that they would use to introduce themselves to the client. The purpose statement should include identifying oneself; stating why the worker is meeting with the client; and the outcome the worker expects to accomplish through the meeting and interview. The purpose statement should be approximately three or four sentences and be specific to the function the worker performs in the agency.

The participants are then instructed to review the client statements listed in Part B of the handout and to write a response demonstrating the appropriate use of the skill called for. The activity is to be done individually first. At a signal from the trainer, participants are to share their responses in small group and develop a consensus as to the most effective demonstration of the skills.

Step 3:
Trainer reviews the small group work and selects one purpose statement from each group to be written on newsprint and posted. Trainer should attempt to get purpose statements from several different worker roles. On another sheet of newsprint, the small groups are to write their consensus response to each of the three client statements on newsprint and post on the wall. Trainer reviews the posted responses, seeks feedback from the large group, and offers motivational and constructive feedback. Possible effective responses to the client statements are as follows:

> Client: “I’ve got three kids, no job and I just found out I’m diabetic. I don’t know what I’m going to do. It’s so hard.”
>
> Worker response: “You feel overwhelmed by all you have to do and face in your life.”

Section V: More Interviewing Skills Defined and Demonstrated (continued)

Step 3 (continued):

Client: "I've got a decent place to live now, I've been clean from drugs for six months, and the judge said Tiffany can come home with me next week. Wow!"

Worker response: "You're really proud of what you've accomplished and excited about Tiffany coming home."

Client: "I'm sick and tired of CYS harassing me. I hear fighting and kids screaming all the time from the family at the end of the street. Why aren't you investigating them instead of me?"

Worker response: "You're angry and think it's unfair that CYS is investigating your children's care."

Step 4:

Trainer closes the exercise by reflecting on the importance of the skills being practiced for engagement with the client in the collaborative partnership and in facilitating movement toward case goals.

LUNCH: This may be an appropriate time for lunch break.

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Day I – P.M.

Section VI: Interactional Skills Practice

Estimated Length of Time:
60 minutes

Learning Objectives:
Participants will be able to:
- ✓ Demonstrate the Beginning, Middle, and Ending Phases of the Interactional Model and associated skills in a simulated interview.
- ✓ Demonstrate the skill of giving effective feedback.

Method of Presentation:
Triad skill practice, large group discussion

Materials Needed:
- ✓ **Overhead #12 (Instructions for Conducting the Practice Interview)**
- ✓ **Handout #12 (Jenkins/Barlow Scenario & Preparation)**
- ✓ **Handout #13 (Jenkins/Barlow Interview Script)**
- ✓ **Handout #14 (Jenkins/Barlow Observation Feedback Form)**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
I. Assessment – Produce Family-Focused Assessment. Outcome: Permanence. E 1b)
II. Service Planning – Meet Concrete Needs. Outcome: Safety and Well-being. I. 1.e)

CFSR Issues:
None

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the specific environmental situation
Clarifying purpose
Dealing with issues of authority
Reaching for feedback
Reaching for feelings
Putting the client’s feelings into words
Confrontation
Providing relevant data
Identifying next steps

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Section VI: Interactional Skills Practice

Outline of Presentation:

Trainer provides participants with an opportunity to practice and demonstrate the Interactional phases and skills presented thus far using the Jenkins/Barlow scenario, script and observation feedback material. Trainer will circulate during the practice interviews to observe and coach as needed. Trainer will process the activity afterwards.

Step 1:
Trainer displays **Overhead #12 (Instructions for Conducting the Practice Interview)** distributes **Handout #12 (Jenkins/Barlow Scenario & Preparation)** and explains that the participants will have an opportunity to practice the Interactional phases and skills presented thus far using the Jenkins/Barlow scenario and receive feedback from their peers. Before forming triads, the trainer asks the participants to review the scenario and to complete the "Tuning-in" items and review the purposes of the interview. This task should take about five minutes.

The trainer then asks the group to share their responses to the "Tuning-in" elements and asks for confirmation that the purposes of the interview are understood.

Step 2:
The trainer then forms triads. The most likely way to produce a diverse mix would be to take the total number of participants, divide that number by three, and have the group count off by that number. Persons with the same number become a triad. If the process does not produce exact triads, some triads can become a group of four with the fourth person becoming an additional observer. The trainer then asks the participants to group themselves into their respective triads.

Step 3:

The trainer explains that there will be three important roles to be played in this simulated interview practice. One member of the triad will play the client, Clara Barlow.

Trainer Note: In this practice, a male or female can play Clara. Another member of the triad will be the caseworker, Terry Jenkins. The third member of the triad will be the observer/coach. The role of the observer coach is to help to keep the practice on task and to offer assistance as needed. The trainer explains that the interviewer and/or interviewee may call "Time out" if they become stuck and need coaching from either the observer or the trainer

Section VI: Interactional Skills Practice (continued)

Step 4:
Trainer distributes **Handout #13 (Jenkins/Barlow Interview Script)** and **Handout #14 (Jenkins/Barlow Observation Feedback Form)** and instructs the participants to read over the interview script and the observation form. The script is intended to give the participants some ideas of how the interview might go and examples of skill usage. In the actual interview, the interviewer and client are not to use the actual script. The interview should move along spontaneously. Only the observer may refer to the script. The interviewer may use **Handout #12 (Jenkins/Barlow Scenario & Preparation)** as a guide in pursuing the purposes of the interview.

Step 5:
The trainer then instructs the triads to determine their roles either by choice or by lot and proceed with the interview. The trainer circulates during the exercise and offers coaching as needed or requested. The interview will likely take about 10 minutes. Triad feedback session should follow with both oral and written feedback using **Handout #14 (Jenkins/Barlow Observation Feedback Form).** The interviewer receives the completed observation form.

Step 6:
The trainer processes the activity by asking for a report from each of the triads as to whether the purposes of the interview were accomplished and what went well in the interview and what obstacles were encountered. Trainer offers feedback and suggestions for improvement where appropriate.

BREAK: This might be an opportunity for a break.

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Section VII: Interviewing the Angry and Resistant Client

Estimated Length of Time:
60 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the Interactional Helping Skills useful in managing client anger.
- ✓ Identify strategies for managing client resistance.

Method of Presentation:
Lecture, large group demonstration

Materials Needed:
- ✓ **Overhead #13 (Anger Event Stages)**
- ✓ **Overhead #14 (Steps and Skills Useful in Managing Client Anger)**
- ✓ **Overhead #15 (Some Reasons for Client Resistance)**
- ✓ **Overhead #16 (Strategies for Managing Resistance)**
- ✓ **Handout #15 (Managing Client Anger: Stages, Strategies and Skills)**
- ✓ **Handout #16 (C.J. Smith Script)**
- ✓ **Handout #17 (Some Reasons for Client Resistance)**
- ✓ **Handout #18 (Strategies for Managing Resistance)**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.
Schiraldi, Glenn R.; Kerr, Melissa Hallmark (2002). The Anger Management Sourcebook.
Potter-Effron, Ronald (1994). Angry All the Time.

PA Standards:
I. Assessment – Produce Family-focused Assessment. Outcome: Permanence. E. 1a)
I. Service Planning – Establish a Planning Process. Outcome: Safety and Permanence. A. 1 e)

CFSR Issues:
Outcome S1
Outcome P2

Interactional Helping Skills:

Tuning in to self
Tuning in to others
Tuning in to the environment/Safety
Focused listening

Section VII: Interviewing the Angry and Resistant Client

Interactional Helping Skills (continued):
Dealing with issues of authority
Reaching for feelings
Displaying understanding of client feelings
Confrontation
Demand for work
Contracting
Summarization
Identifying next steps

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Section VII: Interviewing the Angry and Resistant Client

Outline of Presentation

The trainer explains the rationale for managing client anger and various forms of client resistance. Trainer explains and demonstrates how the client anger events can be managed within the framework of the Shulman Interactional Helping model using a combination of interviewing skills and strategies. Typical forms of resistance are presented along with strategies for managing the resistance. Participants have the opportunity to consider application of the skills and strategies presented along with their own strategies to the specific problems encountered in their casework practice.

Step 1: Presentation of the rationale for learning to manage client anger.
The trainer presents the rationale for learning to manage client anger. Client anger is commonplace in the work of child welfare. The intervention of the child welfare worker is often experienced by clients as intrusive and posing a threat to both the self-esteem of the client and the integrity of the client's family. Client anger can emerge at the onset of agency involvement or at any stage in the casework process where the goals of the agency and the goals and perceived interests of the client come into conflict.

The child welfare worker needs to be able to anticipate and prepare for anger events at any time in the life of a case and be able to use a variety of interviewing skills effectively to help the client de-escalate and refocus on the work of achieving the desired outcomes for the case.

In addition, client anger and anger in general generates stress for the worker. The more skilled workers are in managing client anger and their own anger responses, the more competent and less stressed workers will feel.

Step 2:
The trainer models "Reaching for Feedback" skill by asking participants to respond to the trainer's statements about the importance and impact of dealing with client anger on the stress level of the worker and on the worker/client relationship. The trainer asks for several examples of worker's experience in dealing with client anger. The trainer structures the responses by asking the volunteers to provide the following information:

- A brief description of the anger event.
- The emotional, physical, and psychological impact on the worker (Tuning in to self).
- Consideration of how the client might have felt (Tuning in to others).
- Impact on the worker/client relationship (Tuning in to the phase of work).
- Skills that the worker found useful in managing the anger event (building on worker strengths).

Section VII: Interviewing the Angry and Resistant Client (continued)

Step 2 (continued):
The trainer notes participant responses regarding the impact on the worker (emotional, physical, and psychological) on one newsprint page, and on another page the skills that the worker found to be helpful in coping with the anger event. The trainer summarizes the discussion and states that the structure and skills that form the helping models are useful in dealing with client anger (models the skills of summarizing and next steps).

Step 3:
Displaying **Overhead #13 (Anger Event Stages),** the trainer reviews the various stages in an anger event. The event may have varying degrees of angry emotion and behavior from sullenness to threats of harm.

Step 4:
Displaying **Overhead #14 (Steps and Skills Useful in Managing Client Anger)** and distributing **Handout #15 (Managing Client Anger: Stages, Strategies and Skills)** the trainer presents strategies and skills in interviewing the angry client using the Shulman Interactional Helping Model and the Interactional Skills.

Trainer notes that workers, like our clients are not perfect. Sometimes the worker may be caught up in the anger event, may personalize the client's anger and comments, and may respond ineffectively or inappropriately. Should this occur, at the next interview opportunity the worker might review with the client what went wrong, should apologize if necessary, and attempt to repair the collaborative/protective partnership and find a better resolution of the conflict with the client?

Step 5:
The trainer distributes **Handout #16 (C.J. Smith Script).** The trainer explains that the dialogue represents a worker's attempt to use some of the skills and strategies just presented. The script includes three outcomes based on the level of client de-escalation and cooperation and the worker's assessment of threat of harm to the worker.

The trainer instructs the participants to review the script and determine if the skills demonstrated by the worker and the outcomes described are consistent with participants experience and would likely be useful in their practice. Trainer informs the participants that they will have 10 minutes to review the script and to discuss their conclusions in small groups.

At the conclusion of the discussion time, the trainer asks for feedback from the small groups and summarizes their feedback.

Section VII: Interviewing the Angry and Resistant Client (continued)

Step 6:
The trainer explains that client resistance may take a variety of forms besides overt hostility. Trainer asks participants to offer examples of client resistance from the workers' experience. Trainer lists them on flipchart. Trainer supplements participant input by stating that resistance can take the form of passive-aggressive behavior, denial, and excuses.

Trainer asks participants what might prompt clients to be resistant to CYS intervention. After taking comments from the participants, the trainer supplements by stating that resistance is often prompted by fear. Trainer distributes **Handout #17 (Some Reasons for Client Resistance)** and displays **Overhead #15 (Some Reasons for Client Resistance).** Because of CYS intervention, clients may feel a potential loss of control of personal and family decision-making, anxiety about change, loss of self-esteem and fear exploitation. Sometimes resistance is the only experience of control that the client knows, a kind of negative self-empowerment.

These feelings are not abnormal. Moreover, these fears and attendant resistance may be intensified by a lack of basic trust and by learned ways of protecting self and family. Minorities in the United States like African-Americans, Native Americans, and Hispanics have a group history in which encounters with government entities have often resulted in oppression, exploitation, or loss.

The skills of clarifying purpose, tuning-into others, reaching for and giving feedback, looking for client strengths, proper use of protective authority and displaying understanding of client feelings are essential for building trust, establishing and maintaining the collaborative partnership and reducing resistance. When clients see that change is in their self-interest, and the pathways, resources and supports are available, and they have a reasonable measure of control they are more likely to work cooperatively with the agency.

Step 7:
Trainer explains that the worker's use of the above skills creates an environment conducive to positive change. Additional strategies may also be employed to address specific barriers to positive change. Trainer distributes **Handout #18 (Strategies for Managing Resistance)** and displays **Overhead #16 (Strategies for Managing Resistance).** Trainer reviews the strategies and encourages participants to offer additional strategies that they have found useful.

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Section VIII: Transfer of Learning – Day I

Estimated time:
45 minutes

Trainer Note: If not enough time in Day I, time may be reduced or TOL moved to Day II and combined with Transfer of Learning at end of Day II.

Learning Objectives:
Participants will be able to:
- ✓ Identify how strategies and skills presented in Day I can be applied to their casework practice.
- ✓ Provide feedback on their application action plans.

Method of Presentation:
Individual work and group discussion

Materials needed:
- ✓ **Handout #19 TOL Action Plan for Day I**

Resources Needed:
None

PA Standards:
None

CFSR Issues:
None

Interactional Helping Skills:
Reaching for feedback
Reaching for feelings
Giving feedback
Identifying next steps

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Section VIII: Transfer of Learning – Day I

Outline of Presentation:

In this section, the trainer provides the opportunity for participants to apply the content and skills presented and practiced in Day I to their casework practice. Participants should consider an active case in which they would like to apply their learning and describe where this case is in the Interactional Model (Beginning, Middle, Ending), the purpose of their next anticipated interview with the client, and how the content and skills from Day I can be used to enhance engagement and the goals of the case.

Step 1:
The trainer distributes **Handout #19 TOL Action Plan for Day I** and explains the purpose of the activity as described above in the "Outline of Presentation." This individual work will take approximately 25 minutes.

Step 2:
At the completion of the individual work time, the trainer asks for volunteers to share their Action Plans.

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Day II – A.M.

Section IX: Re-engagement from Day I and Expectations for Day II

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify questions or issues regarding material from Day I.
- ✓ Identify the agenda and expectations for Day II.

Method of Presentation:
Lecture and large group discussion

Materials Needed:
- ✓ **Overhead #2 (Agenda Day II)**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
None

CFSR Issues:
None

Interactional Helping Skills:
Reaching for feedback
Clarifying purpose and role

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Section IX: Re-engagement from Day I and Expectations for Day II

Outline of Presentation:

Step 1:
The trainer welcomes the participants to Day II and asks for any questions or comments related to the material from Day I that the participants may have contemplated between the sessions. The trainer responds to the questions and comments.

Step 2:
Trainer displays **Overhead #2 (Agenda Day II)** and reviews the agenda for Day II.

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Section X: Interview Contexts

Estimated Length of Time:
60 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the various context elements that occur in casework practice and the impact on the focus of the interview.
- ✓ Identify the requirements for cultural competence.
- ✓ Recognize difference between the assessment and helping focus and questions in casework practice.

Method of Presentation:
Lecture, Large group activity

Materials Needed:
- ✓ **Overhead #17 (Interview Context Elements)**
- ✓ **Overhead #18 (Culture & Cultural Competence)**
- ✓ **Overhead #19A (Scatoma Paragraph)**
- ✓ **Overhead #19B (Scatoma Definition)**
- ✓ **Overhead #20 (Assessment vs. Helping: Differences and Skills)**
- ✓ **Handout #20 (Culture & Cultural Competence)**
- ✓ **Handout #21 (Assessment vs. Helping: Differences and Skills)**
- ✓ **Handout #22 (Assessment Question Guide).**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
I. Assessment – Conduct Risk Assessment. Outcome: Safety. B. 1e)
II. Assessment – Produce Family Focused Assessment. E. 1a), 1f).

CFSR Issues:
S1, Item 2
S2, Items 3, 4.
WB1, Item17
WB2, Item 21
WB3, Item 22, 23

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the specific environmental situation

Section X: Interview contexts (continued)

Interactional Helping Skills (continued):
Clarifying purpose
Focused listening
Dealing with issues of authority
Reaching for feedback
Reaching for feelings
Displaying understanding of client feelings
Putting the client's feelings into words
Providing relevant data
Containment
Questioning
Confrontation
Summarizing
Identifying next steps

Section X: Interview contexts (continued)

Overview of presentation:

The purpose of this section is to develop or increase awareness in the participants of the need to recognize changes in the interviewing context and adapt interviewing skills and strategies accordingly. If workers fail to recognize the requirements of each context and adjust language, strategies, and skills, client resistance is likely to increase and accomplishment of case goals made more difficult. Three contexts are highlighted: culture and cultural competency; assessment; and helping. Assessment focused interviewing is distinguished from helping focused interviewing. Interviewing skills pertinent to each type are presented.

Step 1: Contexts
The trainer displays **Overhead #17 (Interview Context Elements)** and explains that contexts are people and their culture, age, location, phases in the life of the case, casework, or unit function, phases in the interview, in-person or telephone contact, and situational factors including the personal circumstances of the worker. As these contexts change, the worker must adapt the interview focus, preparation, language comprehension level, length of the interview and kinds of questions asked and developed in the interview. One-size fits all is not applicable to effective interviewing.

The interview will look different if the client is a child vs. an adult, or if the worker is conducting a CPS abuse investigation vs. developing a family service plan with the client, or if the interview takes place in the client's home vs. the agency office. The interview will also look different if the worker is in the middle phase of the life of the case and has a positive relationship with the client vs. the worker is meeting the client for the first time.

While many interviewing skills are used throughout the life of a case or during a specific interview, how extensively or frequently a particular skill is used varies with the context. For example, a worker always begins an interview using engagement skills. However, the worker may focus on engagement and connecting with the client more heavily at the first and second interviews vs. later interviews after the collaborative relationship has been established. Matching interview strategies and skills to each context is essential to promoting positive change.

Step 2: Cultural Context
Using **Overhead #18 (Culture & Cultural Competence)** and **Handout #20 (Culture & Cultural Competence)** the trainer explains that culture is an especially important context. Culture is the client's individual and unique expression of the sum total of all the client's connections to race, ethnicity, gender, religion, sexual orientation, socio-economic level, interests, family, etc. Cultural competency involves several elements. One is an orientation or openness on the part of the worker to understand the client <u>as the client wishes to be understood</u>.

Section X: Interview contexts (continued)

Step 2: Cultural Context (continued):
The worker must want to know the client and be open to learning from the client. When the worker makes the effort to understand the client, the client is more likely to trust and respond to the worker as a concerned person rather than an authority figure only.

The second is to come to understand the client through a general awareness of the characteristics of the reference groups that the client is related to. These reference groups include, race, ethnicity, religion, gender, sexual orientation, socio-economic class, etc. This general knowledge helps to orient the worker to pursue a deeper understanding of the client and to avoid behaviors that may be blatantly inappropriate or offensive to the client.

The worker must be careful not to draw fixed conclusions about the client based on these reference groups alone; otherwise, the worker may stereotype the client. Inevitably, the worker views the client and all information related to the client through the worker's own cultural lens. Blind spots and misperceptions are inevitable. Ultimately, the client is only understood accurately when the worker goes beyond a general understanding and seeks specific information from the client and <u>asks the client for validation of the worker's perceptions.</u> The skills of tuning-into self and our possible bias and blind spots, tuning-into the client, focused listening, displaying an understanding of feelings and reaching for feedback are important skills in the worker coming to know and understand the client accurately.

The proof of the worker's cultural competence is the formation of a partnership with the client in which the mission of the child welfare worker and the goals of the client family are reconciled, pursued, and accomplished collaboratively. In those instances where congruence of goals and process cannot be reconciled, an underlying and mutual sense of respect gives evidence to culturally competent practice on the part of the worker.

Step 3:
Trainer explains that we view the world through our own cultural lens. We cannot possibly know everything about every culture and every person. We must accept the fact that we will have blind spots and require the client's help to understand the client and the pathways to change that are most compatible with the client.

To demonstrate the phenomenon of perceptual blind spots, or <u>scatoma</u>, the trainer explains that a paragraph will be displayed on the overhead for 40 seconds. The participants are to silently count the number of letter "f" as in "Frank" that they identify in the paragraph. Participants are not to comment or share their count at anytime during this activity, unless requested by the trainer.

Section X: Interview contexts (continued)

Step 3 (continued):
The trainer displays **Overhead #19A (Scatoma paragraph)** for approximately 40 seconds**.** At the end of 40 seconds, the trainer polls the participants for the number of "f's" each has identified and documents the number on the flipchart. Numbers offered may range from 3 to 8. The trainer repeats the display and polling process one more time, reminding participants of the rule to remain silent. Some participants may change their count, while others may not.

The trainer then counts on the displayed overhead the correct number of letter "F's." The correct number is seven (7). Those who count less than 7 typically miss the "f" in the word "of." Trainer notes that accuracy in this exercise does not indicate that we have accurate perception in all environments and situations.

The trainer displays **Overhead #19B (Scatoma definition)** and explains that our past learning, experience and conditioning may cause us to ignore or miss certain aspects of our environment. Just as we may miss a letter in a paragraph, we may also fail to perceive aspects of our client's world, which are important to the client and the change process, but not apparent to us.

If we do not value the client's perspective and over rate our own objectivity, we will tend to be very directive and impose plans and changes on the client. If we presume we have blind spots, we will be more likely to ask for, listen to the client's story, and seek to engage in a collaborative partnership with the client to overcome barriers and promote positive change.

Step 4:
The trainer explains the focus of our interviewing is also a context. Conducting an assessment and helping to facilitate a plan for change require a different mix of skills and different questions. The trainer displays **Overhead #20 (Assessment vs. Helping: Differences and Skills)** and distributes **Handout #21 (Assessment vs. Helping: Differences and Skills).**

- ✓ **Assessment questions** may be either more ***narrowly focused***, investigative kinds of questions, or ***more general*** in scope using questions that are more open-ended. Narrowly focused questions sequenced in a more rigidly connected way or chain are used to explore allegations of abuse or neglect and for attempting to clearly understand the details of a particular incident or event. The questions are more specific and are connected in such a way as to recreate the chain of circumstances, behaviors, and feelings associated with a specific event.

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Section X: Interview contexts (continued)

Step 4 (continued):

More open-ended assessment question are used to explore general client conditions, relationships, expectations, attitudes and beliefs, etc. Open-ended, more general questions and narrowly focused assessment questions may be used in the same interview. The more general questions may reveal circumstances or events that the worker wishes to explore in more depth and detail using narrowly focused questions.

✓ **Helping questions**, conversely tend to be more open-ended and geared toward identifying goals and facilitating movement toward goal accomplishment. Trainer explains that the helping interviewing strategies and skills will be presented in detail later in the day.

Trainer distributes **Handout #22 (Assessment Question Guide)** to illustrate examples of the different types of Assessment questions and gives the participants time to review the handout. Trainer asks for feedback about the usefulness of the questions.

BREAK: This may be an appropriate time to take a break.

Section XI: Assessment Skills: Demonstration & Practice

Estimated Length of Time:
90 minutes

Learning Objectives:
Participants will be able to:
- ✓ Recognize the effective use of investigative and general assessment questions.
- ✓ Demonstrate the use of the investigative and general assessment questions.
- ✓ Demonstrate the giving and receiving of effective feedback.

Method of Presentation:
Trainer demonstration, triad role-play, and large group discussion

Materials Needed:
- ✓ **Handout #23 (Washington Case Scenario)**
- ✓ **Handout #24 (Script for Exploring Washington Case Allegations)**
- ✓ **Handout #25 (Script for Washington General Assessment Interview)**
- ✓ **Handout #26 (Observation Feedback Form for General Assessment Interview Practice); 2 copies**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
I. Assessment – Conduct Risk Assessment. Outcome: Safety. B. 1e)
II. Assessment – Produce Family Focused Assessment. Outcome: Permanence, E. 1a), 1f).

CFSR Issues:
S1, Item 2
S2, Items 3, 4.
WB1, Item17
WB2, Item 21
WB3, Item 22, 23

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the environment
Clarifying purpose
Focused listening
Dealing with issues of authority
Reaching for feedback

Section XI: Assessment Skills: Demonstration & Practice (continued)

Interactional Helping Skills (continued):
Reaching for feelings
Displaying understanding of client feelings
Putting the client's feelings into words
Providing relevant data
Containment
Questioning
Confrontation
Summarizing
Identifying next steps

Section XI: Assessment Skills: Demonstration & Practice (continued)

Outline of Presentation:

The purpose of this section is to first prepare the participants for skill practice by demonstrating investigative assessment questions, then secondly to provide the opportunity for participants to practice the skills, using their own case material, or the demonstration case.

Step 1:
Trainer explains that in this segment of the workshop participants will be presented with a prepared case scenario and interview scripts to demonstrate the assessment skills and useful assessment questions. Following review of the demonstration material, participants will have the opportunity to practice the skills and get feedback in their triads. Trainer explains that these scripts are intended to highlight interviewing skills and are not intended to represent complete interviews.

Trainer distributes **Handout #23 (Washington Case Scenario)** and asks participants to review the case background. Trainer asks the participants to volunteer the content for the purpose statement, namely why is the worker going to interview Ms. Washington, and what is/are the desired outcomes. The outcomes should include not only assessing the facts around the allegations, but also initiating the engagement process and establishing some agreement with Ms. Washington to work with the agency on understanding the problems and working toward a solution (the requirements of the professional interview).

Step 2 or optional activity:
The trainer distributes **Handout #24 (Script for exploring Washington Case Allegations).** The trainer asks a volunteer to read the client's lines. The trainer may elect to ask for two volunteers, one to read the first two pages of script and another to read the remaining pages of script. The trainer reads the worker lines, pausing to highlight certain skills. Following the reading of the script, the trainer asks for feedback about whether or not the worker accomplished the purposes of this part of the assessment interview.

Trainer emphasizes the importance of the skills of displaying understanding of client feelings, reaching for feelings, giving relevant information, using follow-up questions and summarization. Without the use of these skills, the interview would have consisted of a worker question followed by a client response followed by another worker question with a different focus. The interview would have sounded more like an interrogation than a professional interview. Engagement would have been minimal at best.

Section XI: Assessment Skills: Demonstration & Practice (continued)

Step 3:
The trainer distributes **Handout #25 (Script for Washington General Assessment).** Trainer explains that in this script the worker shifts the context from exploring the allegations to general assessment, which generates information about other aspects of the client's life situations. The subject areas parallel some of the factor categories in the Pennsylvania Risk Assessment Model.

Trainer directs the participants' attention to the purpose statement used by the worker to begin this line of questioning. This continued clarification of purpose by the worker is important for the building of the worker/client collaborative relationship. The clearer the client is about the workers purpose and agenda, the less the client may feel inclined to be resistant.

As in the previous step, the trainer asks a volunteer to read the client lines in the script for Washington General Assessment. The trainer instructs participants to pay attention to the worker's use of more general questions to allow the client to decide the response followed by more narrowly focused questions which add clarity and a deeper understanding of the initial response. In addition, participants are encouraged to note the worker's efforts to identify client strengths and to bring those strengths to the client's attention.

Step 4:
The trainer explains that participants will now have an opportunity to practice the general assessment segment of the assessment interview. This practice session will consist of two interviews. In the first interview, the worker will focus on exploring information related to the client's relationship with and treatment of children, and the client's own childhood experiences. In the second interview, the worker will focus on the client's adult relationships, possible drug and alcohol use, mental health, and support system. The interviewers should use **Handout #22 (Assessment Question Guide),** "General Assessment Questions" as a reference in proceeding through the interviews. Interviewers should attempt to use as many of the Interactional Skills as are appropriate.

Trainer instructs participants to re-form their triads. The roles will again be caseworker, client, and observer/coach. Members of the triad who were not the interviewer in the previous interview exercise will play the interviewer role in this practice segment. The trainer explains that the triad should select case situations from among triad members to serve as practice material or elect to use the Washington case situation.

Section XI: Assessment Skills: Demonstration & Practice (continued)

Step 4 (continued):
The trainer distributes two copies of **Handout #26 (Observation Feedback Form for General Assessment Interview Practice)**. The trainer explains that the triad working together should determine the purpose statement and the desired outcome(s) of the interview for each of the interview practice segments. When ready, the triad should begin the interview practice. Each interview should last about seven to ten minutes followed by verbal and written feedback using the Observation Feedback Form. Time-out can be called if the interview bogs down and the triad needs to huddle and re-focus. The trainer will circulate and coach as needed.

Step 5:
At the conclusion of the interviews, the trainer asks for feedback from the triads on the experience what went well and what difficulties were encountered. The trainer should ask for specific examples of skills used. The trainer reinforces accomplishments and offers constructive feedback.

Optional Activity to Replace Steps 2, 3, 4, and 5:
Step 2:
The trainer will tell participants that they will have an opportunity to practice the general assessment segment of the assessment interview. This practice session will consist of two interviews. In the first interview, the worker will focus on exploring information related a client's relationship with and treatment of children, and the clients own childhood experience. In the second interview, the worker will focus on the client's adult relationships, possible drug and alcohol use, mental health and support system. The interviewers should use **Handout #22 (Assessment Question and Guide)**, "General Assessment Questions" as a reference in proceeding through the interviews. Interviewers should attempt to use as many of the interactional skills as are appropriate.

Trainer instructs participants to re-form triads. The roles will again be caseworker, client, and observer/coach who will use **Handout #26 (Observation Feedback Form for General Assessment Interview Practice)**. The triads should practice for seven to ten minutes followed by verbal and written feedback using the observation/feedback form. Time out can be called if the interview bogs down and the triad needs to huddle and re-focus. The trainer will circulate and coach as needed.

Step 3:
At the conclusion of the interviews, the trainer asks for feedback from the triads on the experience of what went well and what difficulties were encountered. The trainer should ask for specific examples of skills used. The trainer reinforces accomplishments and offers constructing feedback.

LUNCH: This is probably an appropriate time to break for lunch.

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Day II – P.M.

Section XII: Interviewing in the Middle/Work Phase: Helping Skills

Estimated Length of Time:
30 minutes

Learning Objectives:
Participants will be able to:
- ✓ Recognize the skill requirements for monitoring and promoting change in the Middle/Ongoing phase of the case.
- ✓ Identify the appropriate combination of both investigative and general assessment questions in the Middle/Ongoing Phase of the case.

Method of Presentation:
Trainer demonstration and large group discussion

Materials Needed:
- ✓ **Handout #27 (Script for Washington Case: Middle/Work Phase: Service Plan)**
- ✓ **Handout #28 (Discussion Guide for Washington Case Middle/Work Phase: Service Plan Review)**

Resources Used:
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
II. Assessment – Produce Family Focused Assessment. Outcome: Permanence, E. 1a), 1f).
II. Service Planning – Establish a Planning Process. Outcome: Safety and Permanence, A. 1a), 1b), 1d), 1h).

CFSR Issues:
S1, Item 2
S2, Items 3, 4.
P1, Item 7.
WB1, Items 17, 18, 19, 20.

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the environment
Clarifying purpose
Focused listening
Dealing with issues of authority

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Section XII: Interviewing in the Middle/Work Phase: Helping Skills (continued)

Interactional Helping Skills:
Reaching for feedback
Reaching for feelings
Displaying understanding of client feelings
Putting the client's feelings into words
Providing relevant data
Containment
Questioning
Confrontation
Summarizing
Identifying next steps

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Section XII: Interviewing in the Middle/Work Phase: Helping Skills (continued)

Outline of Presentation:

The purpose of this section is to demonstrate the use of the Interactional Model in the Middle or Ongoing phase of the case, the combined use of investigative and general assessment questions, and the process of evaluating change and progress in the Ongoing phase.

Step 1:
The trainer introduces the purpose of this section as noted in the Outline of Presentation, above. The trainer then distributes **Handout #27 (Script for Washington Case: Middle/Work Phase: Service Plan)** and instructs the participants to read the updated case information and interview dialogue, paying attention to the worker's use of interviewing skills.

Step 2:
The trainer distributes **Handout #28 (Discussion Guide for Washington Case Middle/Work Phase: Service Plan Review)** and reviews the discussion questions. The trainer instructs the participants to refer back to the interview dialogue and in their small groups to discuss and answer the questions on the discussion guide. The groups should be prepared to discuss their answers when called upon by the trainer.

Step 3:
At the conclusion of the discussion, the trainer asks for the groups finding. Trainer notes that in the Middle or Ongoing Phase of the case the major focus areas include:

- maintenance of an effective safety plan,
- assessing what changes have occurred,
- identifying and reinforcing client behaviors and resources that helped those changes to occur,
- determining what needs to be done to continue and further the positive changes,
- identification and resolution of barriers, and
- planning next steps.

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Section XIII: The Solution-Focused Approach to Helping

Estimated Length of Time:
40 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify the history, values, and principles of the Solution-Focused model.
- ✓ Identify the phases and skills associated with the Solution-Focused model.
- ✓ Identify the use of exception and scaling questions in interview scripts.

Method of Presentation:
Lecture, small group activity, and large group discussion

Materials Needed:
- ✓ **Overhead #21 (Solution-Focused Principles)**
- ✓ **Overhead#22 (Exception Questions)**
- ✓ **Overhead #23 (Scaling Questions)**
- ✓ **Overhead #24 (The Miracle Question)**
- ✓ **Overhead #25 (Follow-up Questions)**
- ✓ **Handout #29 (The Solution-Focused Approach: History, Values & Principles)**
- ✓ **Handout #30 (Exception and Scaling Questions)**
- ✓ **Handout #31 (Miracle Question & Follow-up Questions)**

Resources Used:
Berg, Insoo Kim; Kelly, Susan (2000). Building Solutions in Child Protective Services.
DeJong, Peter; Berg, Insoo Kim (1998). Interviewing for Solutions.

PA Standards:
II. Assessment – Produce Family Focused Assessment. Outcome: Permanence, E. 1a), 1f).
II. Service Planning – Establish a Planning Process. Outcome: Safety and Permanence, A. 1a), 1b), 1d), 1h).

CFSR Issues:
P1, Item 7.
WB1, Items 17, 18, 19, 20.

Interactional Helping Skills:
Summarizing
Giving Feedback
Next steps

Section XIII: The Solution-Focused Approach to Helping (continued)

Solution-Focused Skills:
Complimenting
Exceptions
Scaling
Amplifying
Feedback
Summarizing
Miracle question
Next steps

Section XIII: The Solution-Focused Approach to Helping (continued)

Outline of presentation:

Trainer introduces the Solution-Focused approach including history, principles and the distinguishing features and phases of the model. Trainer notes that this model tends not to be used in its pure form in casework. However, certain principles and skills can be effectively incorporated into much of casework practice and integrated into the Shulman model.

The trainer distributes **Handout #29 (The Solution-Focused Approach: History, Values & Principles)** and gives a brief **history** of the origins of the Solution-Focused approach. The Solution-Focused/building approach was pioneered through the work of Steve de Shazer and Insoo Kim Berg. Beginning in the mid-1970s, de Shazer and Berg and their colleagues, through an inductive process of observing clients in therapy, sought to determine what activities were most helpful to clients. In 1982, de Shazer hit upon the idea that there is not a necessary connection between problem and solution – namely, that helpful solutions could emerge from the client/therapist interaction that were not directly connected to the presenting problem. This was a significant shift from the medical model, which requires a detailed examination of the problem, a more formal diagnosis, and treatment specifically connected to the problem and diagnosis.

Influenced by the research of others in the field of communications, and their own research, de Shazer and Berg recognized that the way in which the practitioner phrases and uses questions has a discernable relationship to the way in which the client responds and how the helping process unfolds. From this research and practice, they developed the Solution-Focused model. Effective use of questions to help clients recognize, explore and use strengths is a key feature of the Solution-Focused approach.

Step 3:
The trainer then displays **Overhead #21 (Solution-Focused principles)** and notes the common-sense thinking behind the principles as well as the foundational strengths-based values shared by both the Shulman model and the Solution-Focused approach and which were presented in Day I of the training.

<u>Solution-Focused Approach Core Principle</u>

If what you are doing doesn't work, stop doing it and do something else.
If what you are doing is working, do more of it.

The last element in the principle is the basis for identifying and building on exceptions.

Section XIII: The Solution-Focused Approach to Helping (continued)

Step 4:
The trainer states that there are four types of questions that are at the heart of the Solution-Focused model. They are exception questions, scaling questions, the Miracle Question and follow-up questions to the Miracle Question.

The trainer displays **Overhead #22 (Exception Questions).** The trainer explains that our clients are not doing the problems that brought them to the attention of the agency 24 hours a day, seven days a week. There are likely times when the problem could have occurred but did not because of luck or by deliberate choice on the part of the client. If the worker can discover those exceptions to the problem and the factors that made the exception possible, the worker can attempt to help the client to increase the frequency of the positive exception. By doing so, the worker helps the client to build on strengths already in the client's world so that with practice, the client can begin to make the exception the norm and eventually displace the problem behaviors.

Step 5:
The trainer displays **Overhead #23 (Scaling Questions)** and distributes **Handout #30 (Exception and Scaling Questions).** The trainer explains that scaling questions invite the clients to put their observations, impressions, and predictions on a scale from 0 to 10. This generates information from the client. The worker can then ask how the client decided on that number. Additional follow-up questions might include what it would take for the number to move just one point in a positive direction. Then what would be the first step the client might take to begin that movement. The worker can also ask what number would reflect a point where the problem or issue would be sufficiently resolved and ask the client to describe that point in more detail.

The trainer refers participants to **Handout #27 (Script for Washington Case Middle/Work Phase: Service Plan)** where the worker uses scaling questions to assess the client's confidence in saying "No" to one of her male friends and leads them through a brief review of that section.

Scaling questions then are a useful tool in helping clients to describe problems, progressive improvement points, begin the planning process, measure commitment and effort and other aspects of family life and the change process.

Step 6:
The trainer instructs the participants to think of a client family they are presently working with and to consider how they might use exception and scaling questions to gather information and help the client to assess confidence, commitment, and small steps toward progress. The trainer asks the participants to write down one exception question and one scaling question that might be useful with the identified client family.

Section XIII: The Solution-Focused Approach to Helping (continued)

Step 7:
The trainer will ask a volunteer to briefly describe the case related issue that the volunteer would like to apply an exception question, and the specific exception question the volunteer has developed. The trainer asks the volunteer to play the role of the client while the trainer demonstrates the application of the exception question skill along with several relevant follow-up questions or skills.

Step 8:
The trainer then asks another volunteer to briefly describe the case related issue that the volunteer would like to apply a scaling question, and the specific scaling question the volunteer has developed. The trainer asks the volunteer to play the role of the client while the trainer demonstrates the application of the scaling question skill along with several relevant follow-up questions or skills.

Step 9:
Next, the trainer displays **Overhead #24 (Miracle question)** and distributes **Handout #31 (Miracle Question & Follow-up questions).** The trainer explains the use of the Miracle Question and follow-up questions in helping the client to develop a concrete picture of the desired change and the impact of the change in the client's life. The purposes of the Miracle Question and follow-up questions are to help the client to see the possibility of positive change as real and to motivate the client to take the first step to making the miracle a reality. Many of our clients live in the moment and have no vision of a better future that is possible and encourages them to try to take the small steps toward a better life.

For those workers who feel using the "Miracle Question" verbatim is uncomfortable or too much of a stretch, the trainer may suggest that the workers may change the wording. They may say instead, "I'd like you to think about what it will be like when you accomplish the service plan and your children are safe with you. What is the first thing you will notice that your life is different and the changes have taken place?"

Step 10:
The trainer displays **Overhead #25 (Follow-up questions)** and explains that following the presentation of the Miracle Question, the interviewer further extends and amplifies the impact of the miracle by a series of questions designed to reinforce the desire to pursue change and to guide the client in exploring the implications of the miracle in the client's life.

BREAK: This may be an appropriate time for a break

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Section XIV: A Change I Want to Make

Estimated time:
50 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify a personal change that they wish to make.
- ✓ Demonstrate the use of Interactional Skills and Solution focused skills in combination.
- ✓ Demonstrate Giving and receiving feedback.

Method of Presentation:
Pair's activity and large group discussion

Materials Needed:
- ✓ **Handout #32 (A Change I Want to Make)**

Resources Used:
Berg, Insoo Kim; Kelly, Susan (2000). Building Solutions in Child Protective Services.
DeJong, Peter; Berg, Insoo Kim (1998). Interviewing for Solutions.
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
II. Service Planning – Establish a Planning Process. Outcome: Safety and Permanence, A. 1a), 1b), 1d), 1h).

CFSR Issues:
WB1, Items 17, 18, 19, 20.

Interactional Helping Skills:
Tuning in to self
Tuning in to others
Tuning in to the environment
Clarifying purpose
Focused listening
Dealing with issues of authority
Reaching for feedback
Reaching for feelings
Displaying understanding of client feelings
Putting the client's feelings into words
Providing relevant data
Containment
Questioning

Section XIV: A Change I Want to Make (continued)

Interactional Helping Skills (continued):
Confrontation
Summarizing
Identifying next steps

Solution-Focused skills
Complimenting
Exceptions
Scaling
Amplifying
Feedback
Miracle question
Summarizing
Next steps

Section XIV: A Change I Want to Make (continued)

Outline of Presentation:

Participants will identify a problem or improvement that they wish to make in their own lives. Using the Interactional and Solution-Focused skills and working in pairs, the participants will serve as consultants to each other. They will both demonstrate interviewing skills and experience the helping effect of the skills as used by their respective partners.

Step 1:
Trainer explains that the participants will have an opportunity to identify a problem or improvement that they wish to make in their own lives. Using the Interactional and Solution-Focused skills and working in pairs, the participants will serve as consultants to each other. They will both demonstrate interviewing skills and experience the helping effect of the skills as used by their respective partners. The problem to be worked on should be meaningful enough to the participants that they have an investment in the outcome, but also one that they feel comfortable enough to share with another member of the group.

The trainer emphasizes that the problem content and the discussion is to be considered confidential and not to be carried beyond this training.

Each interview should take about 10 minutes, followed by 5 minutes for summarization and feedback

Step 2:
The trainer distributes **Handout #32 (A change I Want to Make)** and instructs the participants to complete Part I of the handout. After completion of Part I, the trainer instructs the participants to form pairs. After the pairs are formed, the trainer explains that the partners are to exchange their handouts, review Part I of the handout and then proceed to conduct a helping interview. After following the interview question guide in Part II and before the summary statement, each interviewer should take a few minutes to review what has been learned in the interview, then offer a summary statement to the partner including strengths discovered. The interviewee and interviewer should discuss the interview and offer feedback.

Step 3:
After both members of the pairs have had an opportunity to interview each other, the trainer recalls the partners, reforms the large group, and asks for feedback about what was learned from the exercise, skills used and any obstacles encountered. The trainer offers feedback and suggestions for skill improvement.

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Section XV: Transfer of Learning

Estimated Length of Time:
30 minutes

Learning Objectives:
Participants will be able to:
✓ Apply workshop learning by identify one of their own cases and developing interview guides for their next client interview.

Method of Presentation:
Lecture, individual and small group activity

Materials Needed:
✓ **Handout #33 (TOL Action Plan for Day II)**
✓ **Handout #34 (Interview Preparation Guide: Action Plan)**

Resources Used:

Berg, Insoo Kim; Kelly, Susan (2000). Building Solutions in Child Protective Services.
DeJong, Peter; Berg, Insoo Kim (1998). Interviewing for Solutions.
Shulman, Lawrence (1999). The Skills of Helping Individuals, Families, Group, and Communities (Fourth Edition). Illinois: F. E. Peacock Publishers, Inc.

PA Standards:
None

CFSR Issues:
None

Interactional Helping Skills:
None

Solution-Focused Skills:
None

Section XV: Transfer of Learning (continued)

Outline of Presentation:

In this segment of the training participants have the opportunity to apply the knowledge and skills developed in the workshop to one of their own cases and to get feedback from their colleagues and the trainer on the proposed action plans.

Trainer Note: If time is an issue, the trainer may elect to make the **Handout #33 (TOL Action Plan for Day II)** a post-training activity to be reviewed and follow-up on with the participant's supervisor.

Step 1:
Trainer distributes **Handout #34 (Interview Preparation Guide: Action Plan)**. Trainer explains that each participant is to identify a case he/she is presently working on. The worker is to consider his/her next interview session with the client, then complete the interview guide, which includes the following points:

- ✓ What phase the case is in (beginning, middle, or end/transition)?
- ✓ The purpose of the interview.
- ✓ The outcome the worker hopes will result from the interview.
- ✓ Who the worker expects to be present?
- ✓ Location?
- ✓ Worker feelings about conducting the interview (Tuning in to self).
- ✓ Worker thoughts about how the client might feel (Tuning in to others).
- ✓ Any safety considerations (Tuning in to the environment).
- ✓ Explanation of how the worker will use the models and skills presented in the workshop in the interview session with the client.

Step 2:
Following individual completion of the interview guide, the trainer signals the participants to reform in their triads, share their interview action plans with each other, and offer feedback.

Step 3:
At the end of small group sharing, the worker asks for one example to be presented from each triad (or from as many triads as time allows). The trainer offers feedback after each presentation.

The trainer encourages participants to go through this planning exercise for each planned interview they do.

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Section XVI: Review, Evaluations & Closing

Estimated Length of Time:
15 minutes

Learning Objectives:
Participants will be able to:
- ✓ Identify concepts and skills learned.
- ✓ Identify learning needs accomplished
- ✓ Identify further opportunities for skill application upon return to the agency.

Method of Presentation:
Large group discussion

Materials Needed:
- ✓ Workshop Evaluation Form

Resources Used:
None

PA Standards:
None

CFSR Issues:
None

Interactional Helping Skills:
None

Solution-Focused Skills:
None

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Section XVI: Review, Evaluations & Closing (continued)

Outline of Presentation:

The purpose of this section is to provide an opportunity for the participants to give feedback to the trainer on the usefulness of the knowledge and skill content and the effectiveness of the methods used. Participants will also identify those learning needs and issues listed on Day I that have been met in the training.

Step 1:
Trainer briefly reviews and summarizes key concepts and themes from the two-day workshop.

Step 2:
Trainer visits the flipchart pages from Day I where participants expressed their learning needs and expectations of the trainer and group members. Trainer asks group for feedback as to whether the need or expectation was met to a satisfactory degree.

Step 3:
Trainer then asks the group members to individually offer comment about what was most useful for them and less useful in the workshop. Also, to offer any suggestions for changes in either content or method.

Step 4:
Trainer thanks participants for their attention and work during the workshop. The trainer distributes the workshop evaluation form, which the participants complete and hand in. The trainer concludes the workshop.

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