

CIL-NET Presents...

Effective Service Coordination: Engaging Consumers with a Holistic Approach to IL Services

Effective Interviewing and Goal Setting Practices

March 26, 2013

1:30 – 4:00 P.M.

Presenter:

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Effective Interviewing and Goal Setting Practices



- Key Elements of a Successful Initial Interview
- Strengths-based approach to interviewing—assessing consumer needs, interests, and dreams
- Strategies to support consumer control and direction in the interview
- How to assist consumers to identify and reach their IL and Community Integration Goals
- What are goals and how to write them
- How to use core services to achieve goals—determining what needs to be done, when it needs to be done, and who is responsible.

Key Elements of a Successful Initial Interview

Ahhhh...the first meeting with a new consumer can be filled with excitement, anticipation and sometimes *anxiety*.

- Will I ask the right questions?
- Will I arrive on time?
- Will I be able to find the house?
- I hope I don't get lost!
- How on *Earth* can I discover what my consumer wants or needs?

Key Elements of a Successful Initial Interview, cont'd.

- Probably won't find the answers here!



Initial Consumer Contact

However, you *will* find the answers in understanding, practicing, and implementing good interview techniques.

Good communication starts when contacting your consumer to schedule your first interview. This is a golden opportunity to discover if he/she needs an accommodation: materials in alternate formats (Braille, large print, disc), sign language, oral or foreign language interpreter.

Initial Consumer Contact, cont'd.

- During your conversation you may want to discuss what length of time for your visit would be comfortable for your consumer:
 - “I usually block between 1 and 2 hours for our first meeting.” What works best for you?” You may find that your consumer gets tired after 45 minutes or that he/she could meet with you for hours!
 - Setting a timeframe keeps us on task and moving forward. Certainly, after your initial few visits, you will be able to tell what length of time works for the two of you.

First Interview

Depending upon where you've decided to meet:

- First, set the stage. When meeting at your office create an accessible, warm, safe, welcoming atmosphere.
- How can we do that?



First Interview, cont'd.

- Orient and/or give your consumer a tour of your agency, pointing out exits and bathrooms.
- Accessible, comfortable room/office that meets your consumer's needs.
- Reduce clutter, noise and extreme lighting.
- Avoid rooms with bright colors and/or a lot of activity happening on the walls.
- If your center does not have a fragrance-free policy, reduce or get rid of as many odors as you can, starting with yourself, avoid use of perfumes and scented products.

First Interview, cont'd 2

- Placement in the room can be crucial. If you have glass windows or doors facing into your agency, you may want to place the consumer with their back to the door, less distractions.
- This is NOT the time to multi-task! Turn off your cell phone and ask your consumer to do the same.



First Interview, cont'd. 3

- Create an atmosphere where you are both giving one another your undivided attention.
- Be mindful of confidentiality and respectful of your consumer's privacy, make sure others aren't wandering in and out of the room!



First Interview—Different Locations

- If you're meeting with your consumer outside your office, choose a venue using the same criteria as meeting in your office. Make sure that the space is accessible for your consumer.



First Interview—Community Locations



Some Suggestions:

- Library
- Coffee Shop
- Restaurant
- Other Social Service Agencies
- Government buildings



First Interview—Consumer's Home

Consumer's home: may involve asking the consumer to turn down or off the TV, radio.

- Ask that a pet be moved to another room (that isn't a service animal)
- Ask that family and/or friends visiting leave the room (unless invited by the consumer to be there)



First Interview—Via Phone

- If a face-to-face meeting isn't possible, then you can conduct this initial meeting over the phone. Cell phones may not be the best choice due to "iffy" reception, so use a landline whenever possible.
- You might want to use a headset or put the phone on "speaker" (as long you have privacy) allowing you to take hands free notes.



Creating the CSR

Regardless of where you are meeting with the consumer, you will develop a Consumer Service Record (CSR).

- Some of the information you may have already gotten when speaking with the consumer to schedule your appointment. Name, address, disability info, date of birth, gender, race/ethnicity, etc. Document any info you gather onto the CSR, allowing more time for discussion with the consumer, during your meeting.



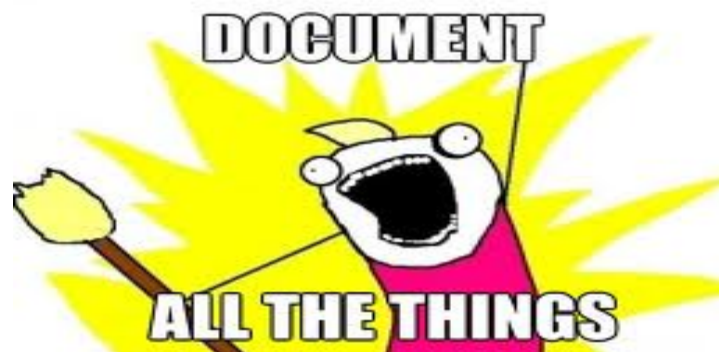
Creating the CSR, cont'd.

A CSR contains (at least) the following documentation/forms:

- Eligibility/Ineligibility form
- Services requested by the consumer
- IL Plan/Waiver
- IL goals or objectives established with the consumer, whether or not in the consumer's IL plan, and the goals or objectives by the consumer.

Creating the CSR, cont'd. 2

- A CSR may be kept electronically or in written form; the IL Plan/Waiver must be kept in writing.
- Check out the ILRU RapidCourse “CSR Documentation: Consumer Service Records” at www.ilru.org





Creating the CSR, cont'd. 3

As the interview begins, explain the intake process at your center and determine whether or not the person is eligible for services.

- We use a form (included in the CSR) to determine this information:
 - What is your disability?
 - How does it limit your ability to function independently?

Creating the CSR, cont'd. 4

Next, we **review** our accommodation form with our consumer to ensure that information received is understandable and accessible.

- We ask if communication in an alternate format would be effective (such as...)

Creating the CSR, cont'd. 5

- Braille
- Large Print
- Audio Tape
- Computer Disk
- Sign Language Interpreter
- Foreign Language Interpreter
- TTY/Video Phone/Video Relay
- Other Suggestions?

Creating the CSR, cont'd. 6

- We ask if another reasonable accommodation is needed to allow equal access to our programs and services (such as...)
 - Assistance filling out forms
 - Meeting at an alternate location

Strengths-Based Approach to Interviewing



Knowing what type of questions to ask our consumer during the interview is helpful. One type of question is strengths-based and is built on the following concepts:

1. Everyone has unique strengths
2. These strengths can be used as a starting place to develop new strengths that will assist individuals in reaching his or her goals
3. IL Specialist has the opportunity to help consumers recognize the strengths they have

Strengths-Based Approach to Interviewing, cont'd.



TIPS—for the initial interview process

Focus on an individual's strengths asking:

- “What is working well right now in your life?”
rather than “What is the biggest problem you are facing right now?”

Strengths-Based Approach to Interviewing, cont'd. 2



The shift in the language of the questions can help create a powerful change in the way a person perceives their current situation. Helping individuals identify what worked well for them before, can help them focus on the possibility of **positive** change.

Example Questions

- What do you want to accomplish in the future?
- What is working well that you can build on?
- What are some creative ways that you or someone you know has addressed this problem in the past?



Strengths-Based Approach to Interviewing, cont'd. 3



- Encourage individuals to verbally acknowledge their strengths and abilities. We are all influenced and motivated by the way significant people in our lives respond to us. People with disabilities are no different. They are too often told and reminded of the things they can't do, which may influence the way they think about themselves.

Strengths-Based Approach to Interviewing, cont'd. 4



Or you could try a different tack:

- Ask individuals what their friends would say their strengths are. While it may be difficult for an individual to say outright what they feel their strengths are, it is often easier for an individual to relate what others say about them!

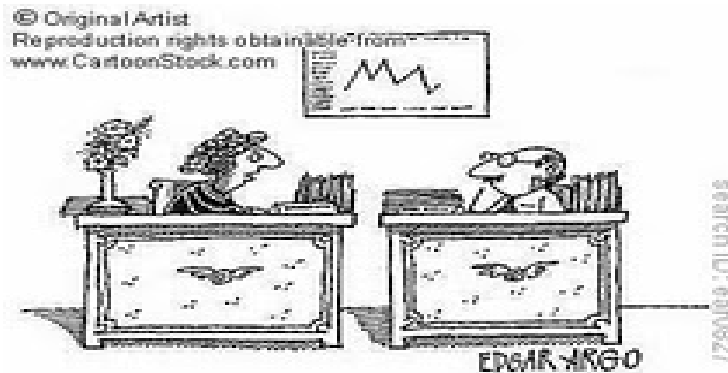
Strengths-Based Approach to Interviewing, cont'd. 5

- Don't assume the individual has a weakness in a particular area, assume that the individual has not yet had the opportunities that are essential to learning, developing, and mastering skills in that particular area.

An important purpose of the independent living planning process is to provide consumers with opportunities to learn and develop new skills that can help them succeed in achieving their independent living goals.

Strengths-Based Approach to Interviewing, cont'd. 6

- Developing a strengths-based perspective takes practice. Sharing your view of an individual's strengths with him/her for the first time can be a challenging experience. Many will adamantly insist that they don't have strengths!



" YOU CAN AGREE WITH ME OR YOU
CAN BE WRONG. "

Strengths-Based Approach to Interviewing, cont'd. 7



- If this happens, compliment them on their *persistence* in maintaining that they don't have any strengths. Point out that perhaps their persistence is a strength they have relied on in other settings to stand up for themselves or accomplish a difficult task. For many individuals, identifying or having their strengths identified out loud is a first-time experience and can be quite profound.

Strengths-Based Approach to Interviewing, cont'd. 8

- Does your center have strengths-based items on your interview forms? If not, you can create your own checklist to guide your questioning. Better yet, work with your colleagues to incorporate strengths-based items into your center's forms.



Supporting Consumer Control and Direction in the Interview



During your meetings with your consumer, always remember who is driving the bus!

- Consumers should always drive the discussion.
- Listen to your consumers and allow them to identify what they want to work on and how they might accomplish that.
- Ask open-ended questions to encourage your consumer to talk without feeling defensive for the purpose of exploration. Also direct the flow of the conversation to the consumer.

Examples of Open-Ended Questions

Another good technique for asking questions:

- Open-ended questions usually begin with “What and “How” or phrases like “Tell me about....”
Often not really a question, but, a statement that needs a response.
- Open-ended questions are designed to encourage a meaningful answer using the consumer’s own knowledge and feelings. They are more objective and less leading than closed-ended (yes or no) questions.

Examples of Open-Ended Questions, cont'd.



- Tell me a little about your current living situation.
- What do you like about your current living situation?
- What do you not like or would like to change about your current living situation?
- Tell me about your relationship with...

Open-Ended Responses

Just as important are Open-Ended *Responses*:

- They give encouragement and assistance in communicating.
- Allow your consumer to determine the direction the conversation is going.

Responses are general rather than specific and may be either complete or incomplete statements or questions that cannot be answered with a simple yes or no.

Open-Ended Responses, cont'd.

Examples of Open-Ended Responses (prompters for more information):

- Would you like to say more about it?
- Do you want to talk about it?
- Could you explain a little more about...?

Open-Ended Responses, cont'd. 2

During the open-ended responses, support your consumer's strengths:

- Again, your consumer may not recognize their strengths. Use any opportunity to reinforce the person's strengths that you see or hear. For example:

"It seems to me that you showed a lot of strength in that situation."

Open-Ended Responses, cont'd. 3



Assess your consumer's resources and support system.

- Your consumer will be stronger when they can allow themselves to get what they need from as many sources as necessary.

Asking for support and being dependent are not the same thing.

Initial Interview—What NOT to say!

We've discussed what to say, but, just a few words of caution regarding what NOT to say!

- Questions for information and clarity are vital, but **questions that are loaded, excessive or moralizing** are not necessary. Allow your consumer to reveal themselves at their own pace and they can only do that once trust and rapport have been established.

What NOT to say, cont'd.

- **Offering advice/solutions** implies that you think you know more than your consumer does about what is right. It also shows that you are NOT listening, since advice is based on your experience not your consumer's. Give your consumer direction to look at all possible alternatives and to consider the pros and cons of each. Your consumer can make the decision on their own.

What NOT to say, cont'd.2

- **Making judgments or criticizing** are demeaning. You may not agree with how your consumer handles a situation but critical comments will probably cause your consumer to close off their feelings from you. You can be honest without putting your consumer down and still support them by conveying what you say with respect.

What NOT to say, cont'd. 3

- When you empathize with your consumer be careful that you are not **sympathizing**. You don't want to belittle your consumer's feelings or take them lightly. Let reassurance and support, grow out of your attitude and the way you communicate your concern.

What NOT to say, cont'd. 4

- **“Why”** questions have a negative effect because people often feel defensive when “why” questions are put to them. Support can occur without questioning your consumer. Ask yourself if the “why” question really needs answering or if it’s just curiosity. If it needs to be answered rephrase the question to eliminate the “why.”

Assisting Consumers with Goals

- It is our responsibility to support consumers in identifying and reaching their ultimate independent living and community integration goals, rather than simply providing them with services.
- Although responding to the request for a service may seem appropriate, a specific service does not usually address broader significant life areas and is only a limited part of what consumers need to increase their independence and reach their goals.

Assisting Consumers with Goals— 704 Report



Goals should relate to the significant life areas outlined in the 704 Report, Section B, Item 1.:

- Self-Advocacy and Self-Empowerment, Communication, Mobility and Transportation, Community-Based Living, Educational, Vocational, Self-Care, Information Access and Technology, Personal Resource Management, Nursing Home or Institutional Relocation to Community-Based Living, and Community and Social Participation.

Assisting Consumers with Goals— 704 Report, cont'd.



The 704 Report in Section B also mentions gaining access to previously unavailable:

- Transportation
- Appropriate Health Care Services
- Assistive Technology

Assisting Consumers with Goals— 704 Report, cont'd. 2



Other life areas some CILs consider:

- Attendant Care
- Legal Issues
- Health Care and Nutrition
- Housing

Assisting Consumers with Goals, cont'd.



Reviewing these areas with your consumers:

- Improve the likelihood of identifying and addressing broader and more meaningful goals

That result in increased:

- Independence, leadership, empowerment, self-esteem, self-worth, and productivity

Assisting Consumers with Goals, cont'd. 2



- It's important to talk with your consumer about a range of possible goals that they are interested in, but it is also important to assist your consumer in prioritizing what they consider to be the most immediately important goal.

What are Goals?



What are Goals? cont'd.

- Goals identify what the consumer hopes to achieve and this is based on their identified needs and desires. Goals generally relate to significant life areas and/or gaining access to previously unavailable transportation, appropriate health care and assistive technology.
- Ex. Your consumer may say “I need more money!” or “I really want to lose weight” or “I want to go to the RAVE every weekend”
- All are *needs*, we need to dig deeper to discover what the true goal(s) are. (discussion)

What are Goals? cont'd. 2

- Goals can include obtaining housing, finding a job, achieving higher education, managing a household, managing money, nursing home and other institutional transition, and a host of many other goals.
- Goals assist consumers in becoming more independent and often in learning how to advocate for themselves.

Goal Setting and Consumer Direction

- Our role as IL Specialists is to encourage our consumers to take the lead in developing goals while providing them with the necessary tools and information to make informed choices.
- Making those choices and decisions will empower our consumers and also ensure that their needs are being considered and addressed.

Goal Setting and Consumer Direction, cont'd.



- If our consumers are “calling the shots” they will experience “ownership” of the independent living process and will be motivated to work hard on achieving their goals.
- Goal development involves establishing specific measureable goals and time targeted objectives. The goal process helps consumers choose where they want to go in life. It also raises self-confidence and competency and helps to maintain motivation. 😊

How to Write Goals

Let's begin!



How to Write Goals, cont'd.

Goals should be specific and describe what your consumer wants in a precise way.

- “I want to find an apartment” is a vague description of what your consumer wants.
- “I will find a one-bedroom accessible apartment in a secure building, close to the bus line on the south side of the city for \$300-\$400 a month” is clearer and easily leads to action steps.

How to Write Goals, cont'd. 2

- When the goal is more detailed, it is easier to measure and report on whether or not the action steps have been completed, determining whether or not the goal was successful.
- Goals that are too narrow, too broad, and/or not clearly documented may result in not being counted as successes by your center.

How to Write Goals, cont'd. 3

- Whenever possible, we ask that our consumers write their own goals, if that's not possible, staff assist. Always use the consumer's own words.
- Language used in the goal should be made in the present tense and stated in a positive way.
 - Goal Statement: I want to move out of my parents' basement.
 - Positively Stated: I will move out of my parents' basement within 6 months.

How to Write Goals, cont'd. 4

- Positive statements set the tone and lead to positive results!
- Goals should focus on what your consumer wants to do, not what someone else should do—"My boss needs to give me a raise, I need it."
 - “I will work hard to become a better employee by being on time and finishing all my work” focuses on what the consumer will do.

How to Write Goals, cont'd. 5

You may want to develop separate goals when your consumer expresses interest in accessing community services (or other large topic areas) as this could represent an in-depth process that includes many topics.

For example, you may want to develop goals for Meals on Wheels, Family Care, Paratransit, etc.

Remember not to confuse a service with a goal.

While a consumer may request a ramp or benefits counseling, or A.T., look deeper into the reasons behind these service requests. (discussion)

Action Steps

Once your consumer has decided upon a goal the next step is to decide upon what action steps are needed for the goal to be successful. The action steps needed for the success of the goal should represent a logical sequence to achieving the goal.



Action Steps, cont'd.

Sometimes our consumers are not able to identify the action steps needed for the success of their goals. Ask them leading, open-ended questions to facilitate writing these steps.

For example:

“How or what needs to happen to make sure that this goal is accomplished?”

Action Steps, cont'd. 2

Next, list the action steps needed along with a timeline for completion and designate who is responsible for each step.

Action Steps, cont'd. 3

- At our agency, we encourage our consumer to begin each action step with “I will...” even when it is a step that the IL Specialist might be “technically” responsible for, so the step might say, “I will follow up with my IL Specialist to make sure that...was completed.”
- This small change in language directs the responsibility and control for the goal right where it belongs, to our consumer.

Review

- Goals should be simple with a specific purpose. Separate larger multi-part goals into smaller ones.
- Make sure that goals don't conflict with each other.
- Goals should be obtainable.
- Consumer should want and believe in their goals, not just what sounds good!
- Consumer should be able to identify what they want to accomplish each goal.
- Goals should be outcome-based, measureable, (realistic) and time-framed.

Using Core Services to Achieve Goals

- Action Steps should incorporate one or more of the four IL core services.
- Consumer determines which action step are needed to achieve their goals.
- Quality and quantity of results depend on the IL services and specific actions that are planned and completed.
- Staff help their consumer to think about various steps needed for a successful outcome and provide support in generating ideas.

Using Core Services to Achieve Goals, cont'd.

Advocacy, I&R, Life Skills Training, Peer Support are the avenue we use on the road to success!



Consistency with 704 Report

- All relevant IL services, actions steps and applicable timelines must be included in the CSR and ILP, if applicable.
- Wherever possible, services should be expressed in terms of the IL service categories in Subpart III, Section A of the 704 report.

704 Report Service Categories

- Advocacy/Legal
- Assistive Technology
- Children's
- Communication
- Counseling and Related Services
- Family
- Housing
- Home Modifications, and Shelter Services

704 Report Service Categories, cont'd.

- IL Skills and Life Skills Training
- Information and Referral
- Mental Restoration
- Mobility Training
- Peer Counseling
- Personal Assistance Services
- Physical Restoration
- Preventative Services
- Prostheses, Orthotics and other Appliances

704 Report Service Categories, cont'd. 2

- Recreational Services
- Rehabilitation Technology Services
- Therapeutic Treatment
- Transportation Services
- Youth/Transition Services
- Vocational Services

Troubleshooting

Ensuring consumer success does not end with the initial interview, *it's just the beginning*. Sometimes we need to intervene along the way...

- From time to time, our consumers get side-tracked while working with us on their goals.
- Here are few “warning signs and behaviors” that we want to be looking for so that we can quickly intervene before our consumers become completely derailed!

Troubleshooting, cont'd.

If your consumer has:

- Missed several meetings with you
- Begun to arrive late for meetings
- Has other things to work on besides their goal
- Seemed to be in crisis over one thing or another
- Been unable to focus on their goal; attention wanders

Troubleshooting, cont'd. 2

If you have noticed these behaviors then, meet with your consumer and have a frank discussion about what's happening in their lives and determine how you can help. You may:

- Need to assist them with a crisis
- Need to modify the goal if the consumer wants to
- Find the consumer's goal is overwhelming to them

Troubleshooting, cont'd. 3

You may:

- Need to determine if there is a medical/medication issue at play
- Need to determine if something has happened to them (act of violence, death, change in living status, marriage, loss of employment, etc.) or to a family member that's causing stress
- Need to determine if your consumer is sad for any reason

Troubleshooting early on is important, as we want the experience at our center to be a positive one!

Working on Goals—Good Practices

- To ensure that your consumer has the best possible chance of a successful outcome, meet with them and or communicate with them as often as possible.
- Since we are an urban center, and can easily reach our consumers, we meet with them at least twice per month. Most of these meetings are face-to-face.

Working on Goals—Good Practices, cont'd.



- How often you are able to meet with your consumers will depend on center location and number of counties served.
- Meetings may need to happen over the phone, video relay, E-Mail, Skype, etc.
- Connecting on a regular basis, whatever that is to your center, is key to a successful outcome.

Working on Goals—Good Practices, cont'd. 2



At your consumer meetings, ask questions that lead towards reviewing what has happened since you last met and progress toward goals:

- “Let’s review what happened last week.”
- “How has the last week(s) gone?”
- “Have you made any progress toward your goals?”
- “How’s it going?”

****Be sure to note any consumer strengths ☺*

Working on Goals—Good Practices, cont'd. 3



Then, address next steps:

- “Let’s look at what we need to do moving forward.”
- “Do we need to make any calls, send an email, write a letter?”
- “Might any of these tasks involve skills training; is another goal appropriate?”

These practices keep your consumer and you moving forward toward success and allow you to trouble-shoot problems quickly.

Celebrate small victories, end on a positive note!

Promoting Consumer Control

We set the stage for **Consumer Control**:

- By using good interview techniques, strengths-based and open-ended questions
- When we encourage and not lead
- When your consumer takes the lead in meetings
- By meeting and communicating often and troubleshooting potential problems

Information contained in this PowerPoint is designed help you to guide your consumer to a successful goal outcome while promoting **consumer control**.

Group Activity 1—Strengths-Based and Open-Ended Questions



- Using the **Case Study**, select one/two persons from your small group/table to be the “consumer.” The remainder will assume the role of IL Specialist or observer.
- **Consumer Role:** Take a moment and familiarize yourself with the case study. Answer questions given to you, but don’t offer information.

Group Activity 1 cont'd.

- **IL Specialist Role:** Using the questionnaires as your guide, ask your consumer questions about their situation. Feel free to use your own questions. Note answers and responses and any consumer strengths you noticed/heard.

Group Activity 1—Evaluating the Questions Session

- What worked? What didn't?
- Did you find the exercise difficult? Easy?
- Did you think you made progress in learning about your consumer?
- Other comments/suggestions?

Group Activity 2—Goal Writing Practice



Small Group/Table goal-writing exercise

- Use the case study to determine how to use core services to achieve goals.
- Determine **what** needs to be done (develop action steps)
- Determine **when** it needs to be done (timelines)
- Determine **who** is responsible.

Group Activity 2—Evaluating the Goal Writing Session



- How did it go?
- Other comments/suggestions?

Final Words

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel." Maya Angelou



For more information

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Resources

<http://www.ilru.org/html/training/rapidCourses/index.html>

- ILRU RapidCourses: CSR Documentation: 1) Goal Setting with Consumers and 2) Interviewing and Assessing Needs

http://en.wikibooks.org/wiki/Strengths-Based_Social_Work_practice

- Strengths-Based Social Work Practice

<http://www.wikihow.com/Ask-Open-Ended-Questions>

- Ask Open-Ended Questions

Independence*First*: Peer Support Services Manual

available upon request: dlangham@independencefirst.org

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