



# Building Relationships and Determining Suitability Through Case Management in a Virtual Environment

Date December 2, 2020

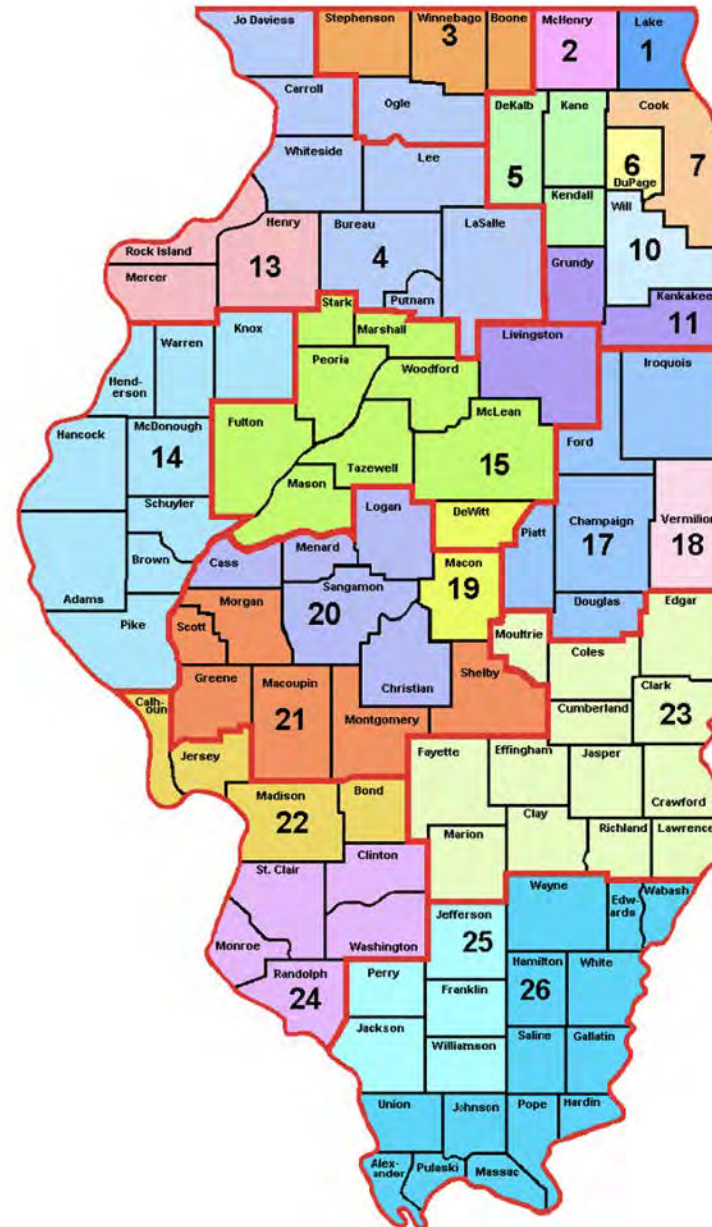
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# Where is Your Local Area?



# Which partner do you best represent?



Introductions

The Process of Change

How Does Suitability Intersect with Change?

Evoking Change Talk

Responding to Change Talk

Summary

Q and A

# AGENDA



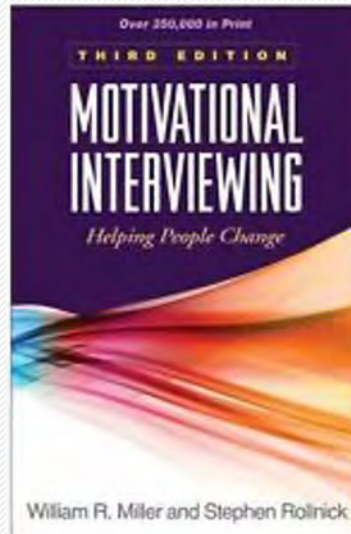
# Using Motivational Interviewing techniques to build relationships that help people change.



# Motivational Interviewing by Definition

A client-centered, directive method for enhancing intrinsic motivation to change by exploring and resolving ambivalence.

A collaborative, person-centered form of guiding to elicit and strengthen motivation to change.



# Building Motivation

Help people  
talk  
themselves  
into  
changing.



“I learn what I believe as  
I hear myself speak.”

D. Bem





**“People are generally better persuaded by the reasons which they have themselves discovered than by those which have come into the minds of others.”**

Blaise Pascal (1623-1662)

# Think about a behavior that you want to change.....

Imagine discussing this with (doctor, friend, spouse) and the response is:

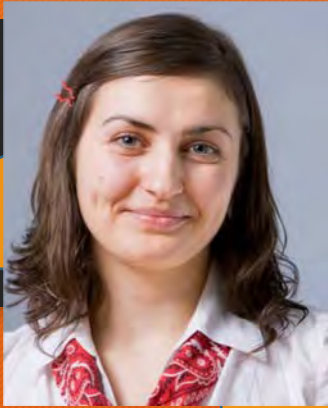
- Telling you all the reasons to change.
- Telling you about the importance of change.
- Telling you how you should go about making the change.
- Telling you how the behavior is hurting you.

Imagine discussing this with (doctor, friend, spouse) and the response is:

- Asks you why you want to make this change.
- Asks you what your three best reasons to change are.
- Asks you how important it is for you to change.
- Asks how you might go about succeeding.
- Asks you what your plan is for how you will make this change.

Which would be more effective and why?

## Building Supportive Relationships



Inquisitive, Curious  
Affirming  
Compassionate  
Accepting  
Empowering  
Collaborative  
Emphasizes Choice  
Draws Out Client View

### **MOTIVATION**

Draws Premature Conclusions  
Coerces, Pressures  
Rushes, Panics  
Judges, Prescribes  
Confronts, Labels  
Fixes, Over-Advises  
Uninterested in Client's Perspective



Staff working in the same setting and offering the same services show dramatic differences in their rates of client dropout and successful outcomes.

**Goal: To  
activate the  
client's  
motivation and  
commitment to  
change.**

Instill hope and direction.  
Reduce stress.

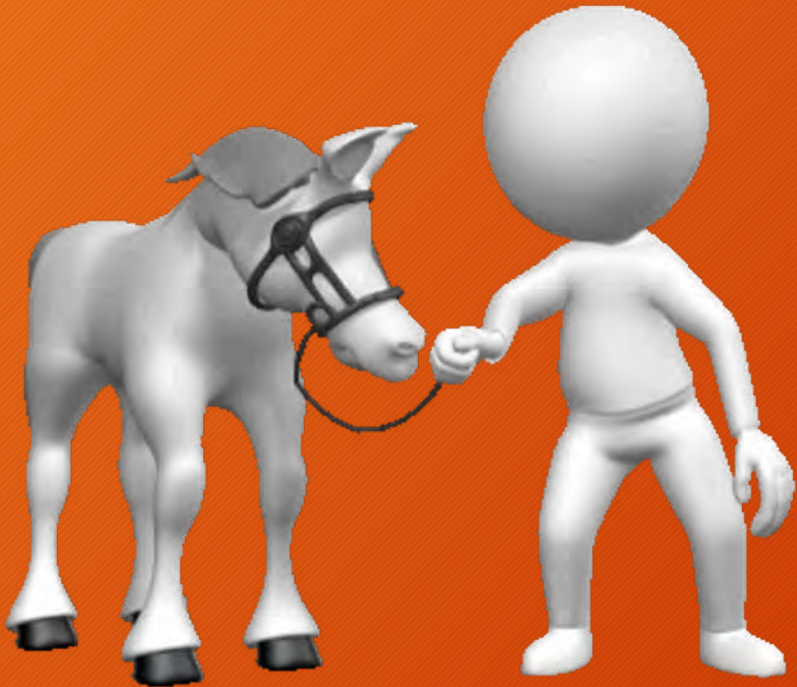


# Why do people change?



Because they want to

...client motivation is key  
to change



Coaches get people ready for change and maintain momentum toward change.



# Stages of Change



Stage

Thought

Precontemplation

“Problem? There is no problem. I am fine.”

Contemplation

“I am not sure there is a problem. Maybe yes, maybe no.”

Preparation

“I am getting ready to make the change.”

Action

“I have a plan and am moving forward.” Less than 6 months.

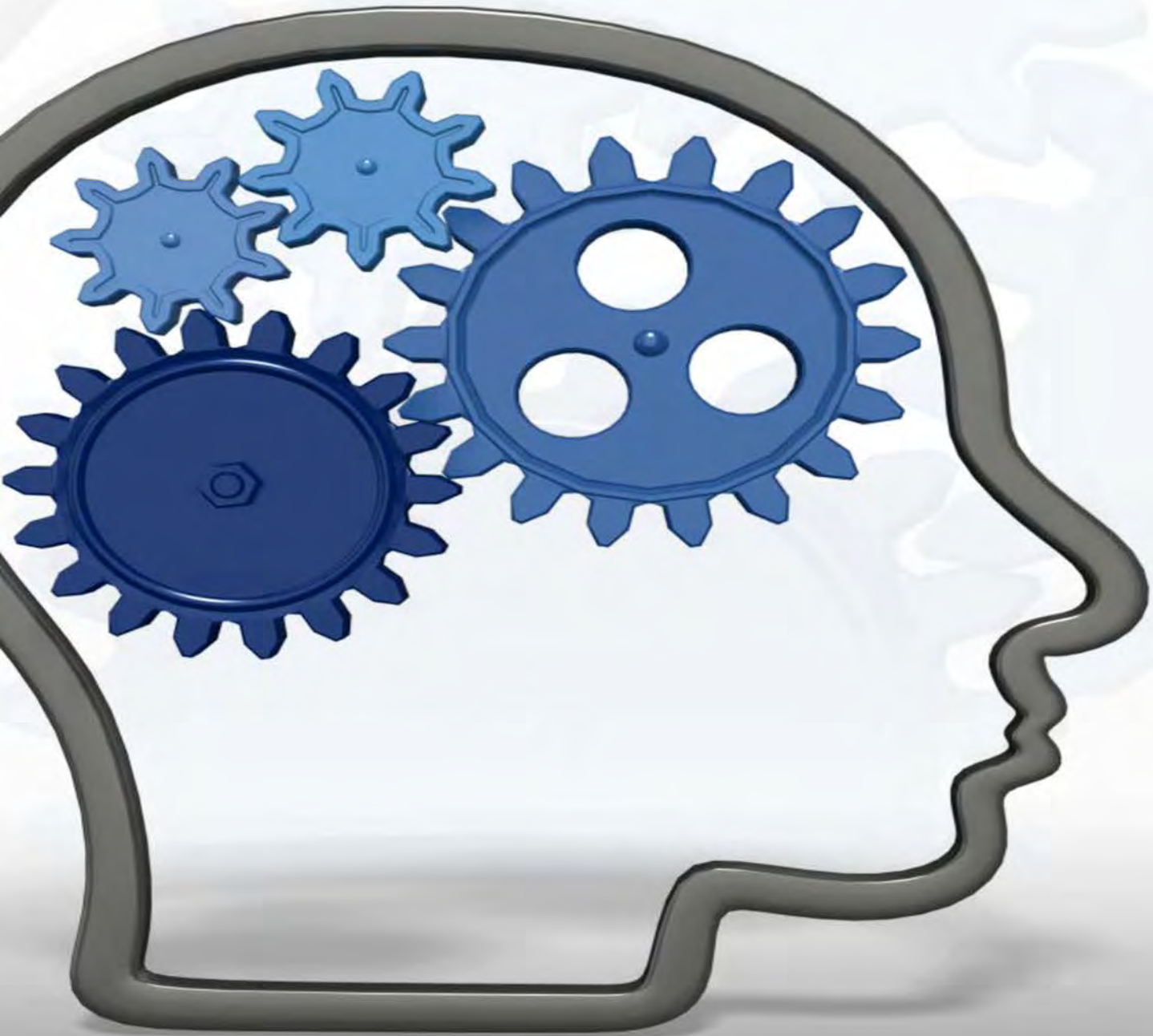
Maintenance

“I am trying.” More than 6 months.

Relapse

“Oops. I quit my job.”





**Change is a  
process, not an  
event**



# Identifying Stages of Change: Activity

Precontemplation

Contemplation

Preparation

Action

Maintenance

Relapse

# IDENTIFY THE STAGE OF CHANGE

1. Student has been missing classes and doing poorly on exams. During discussion, student says: “I am okay. I just need to catch up some. I don’t need any help. I got this.”
2. Student is currently in school in the sixth month.
3. “I haven’t thought about a job. I need a break since I just finished school. I am not in any rush.”
4. Student is doing 5 job searches a week. This is student’s third week in job search.
5. Applicant realizes that the type of work that she has done in the past won’t get her to the lifestyle that she wants. She is thinking about going to school but also thinks maybe school isn’t for her and she should just find the perfect job.
6. Applicant has made decision to enroll into school.
7. Applicant is not satisfied with her current situation. She desires to make changes in her life but is unsure what the next step would be or whether it would be worth it to her.
8. Enrollee is researching schools and length of training programs.
9. Student hasn’t been to class in two full weeks and hasn’t returned your calls.

# IDENTIFY THE STAGE OF CHANGE

- |                   |   |
|-------------------|---|
| Pre-contemplation | 1. Student has been missing classes and doing poorly on exams. During discussion, student says: “I am okay. I just need to catch up some. I don’t need any help. I got this.”   |
| Maintenance       | 2. Student is currently in school in the sixth month.   |
| Pre-contemplation | 3. “I haven’t thought about a job. I need a break since I just finished school. I am not in any rush.”  |
| Action            | 4. Student is doing 5 job searches a week. This is student’s third week in job search.  |
| Contemplation     | 5. Applicant realizes that the type of work that she has done in the past won’t get her to the lifestyle that she wants. She is thinking about going to school but also thinks maybe school isn’t for her and she should just find the perfect job. |
| Preparation       | 6. Applicant has made decision to enroll into school.   |
| Contemplation     | 7. Applicant is not satisfied with her current situation. She desires to make changes in her life but is unsure what the next step would be or whether it would be worth it to her.   |
| Preparation       | 8. Enrollee is researching schools and length of training programs.   |
| Relapse           | 9. Student hasn’t been to class in two full weeks and hasn’t returned your calls.   |

# Change is a process not an event.



## Stage

## Strategy:

Precontemplation

Validate lack of readiness.  
Encourage self-exploration not action.

Contemplation

Clarify that the decision is theirs.  
Encourage evaluation of pros and cons.

Preparation

Encourage small initial steps.  
Provide information, assist in problem-solving.

Action

Re-iterate long term benefits. Focus on goals.  
Review progress to build self-confidence.

Maintenance

Plan for follow-along support.  
Reinforce internal rewards.

Relapse

Evaluate what triggered relapse.  
Plan stronger coping strategies.



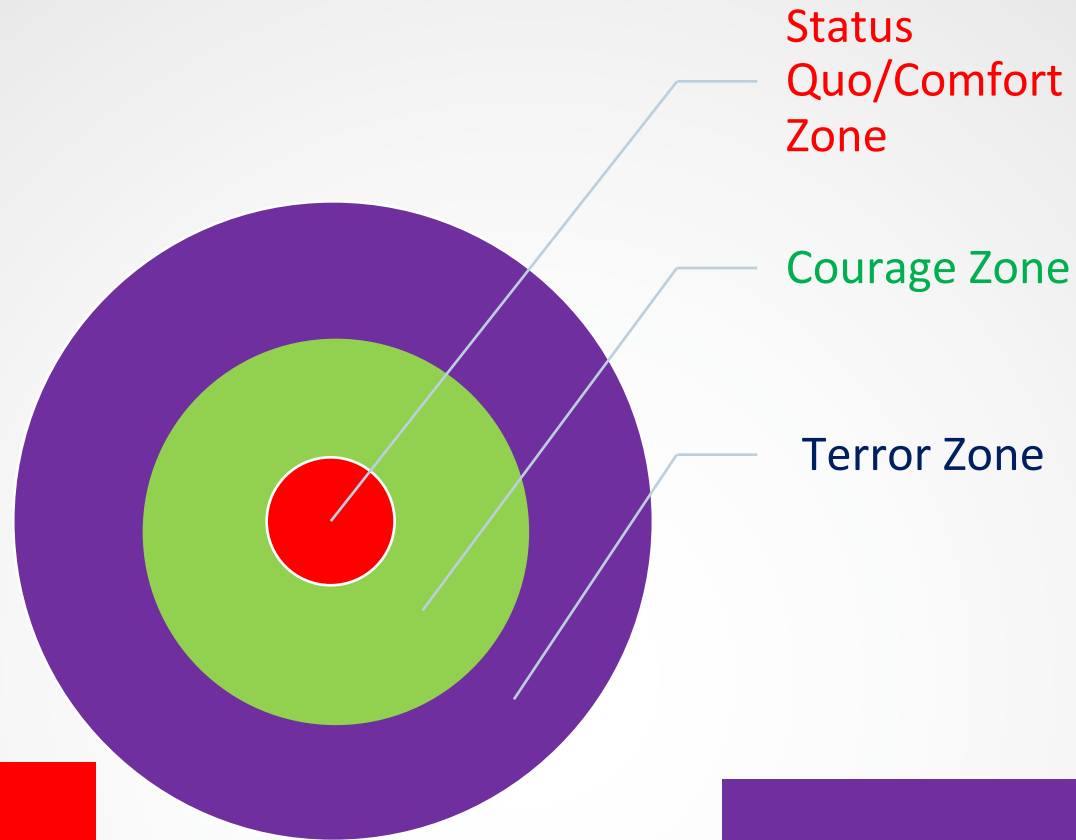
# Why don't we do these TODAY when we know we should?

- Start an exercise program.
- Quit smoking.
- Start a diet.
- Go to school (college/master's/doctorate).
- Cut sugar out of diet in its entirety.

**Think of one reason that you aren't doing something on the list that you know you should be doing.**

**Example: "I don't have time."**





**Status Quo Zone:**

**Routine pattern**

**Minimizes stress and risk**

**Mental security**

**Courage Zone/Learning Zone**

**Tries things never tried**

**Takes a risk**

**Does things that cause some fear**

**Experiences pressure, change, possibility of failure**

**Terror Zone/Panic Zone**

**Paralysis**

**Overwhelmed**

**Frustrated**

**Retreat to comfort zone**

Now that I can picture where I could be, I am not so satisfied with where I am at now. I am ready to try.

**Goals are  
set after  
you dream.**



Career coaches  
help participants  
translate dreams  
into goals .





Start with the dream. Turn them into goals.



Example:

Dream:

- I want to be able to make a better life for my children.

Goal/Steps:

- I will apply to HVAC training so I can work at a high paying job.
- I will call the school and see what the application process involves.

# A Technique for Recording Motivation

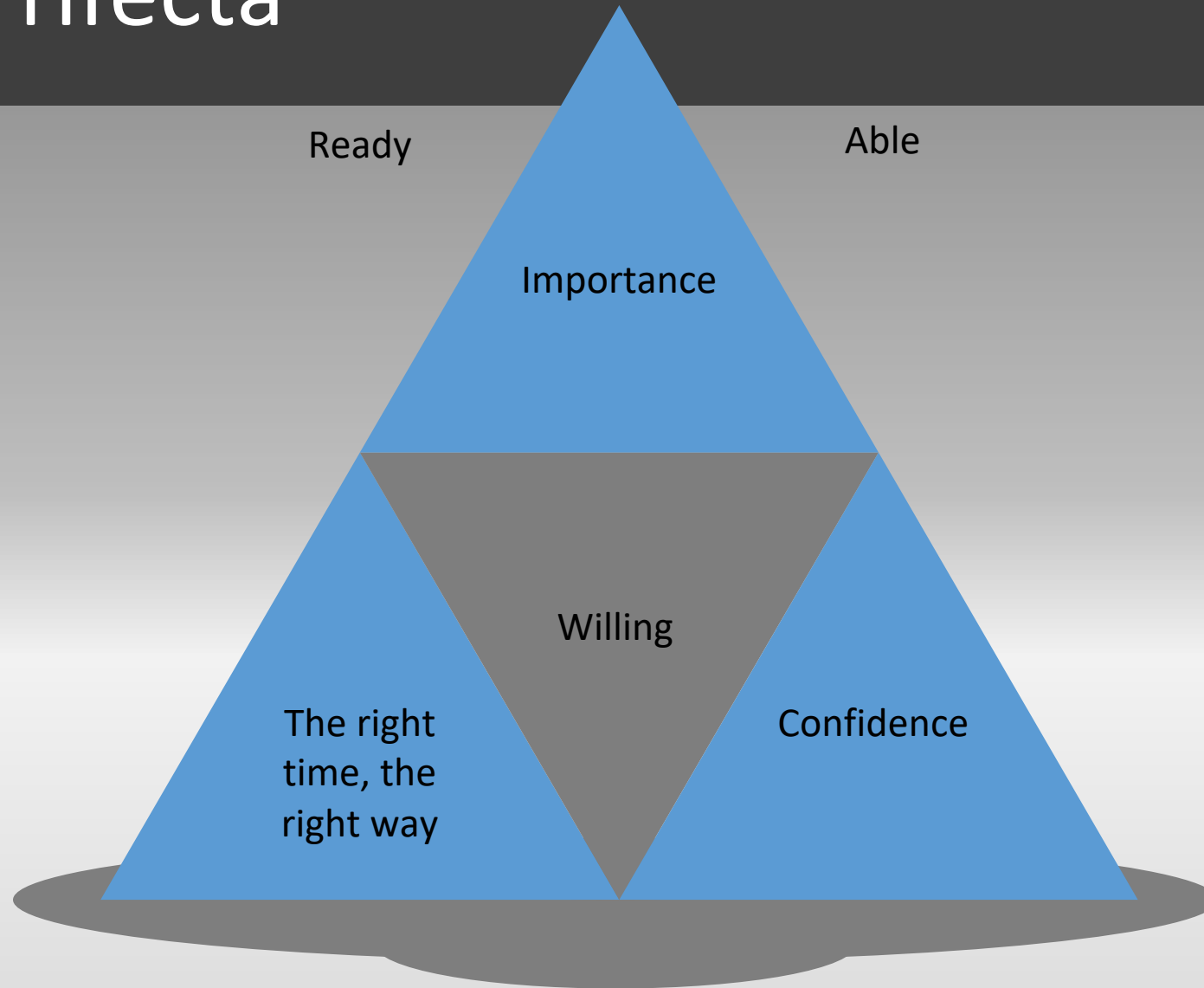


- It is useful to identify how you want your life to be once you are done with training and you are out working. It will help you to stay motivated. Think and list five ways your life would be better if you were working and earning a good income.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



# Change Trifecta



Change Trifecta

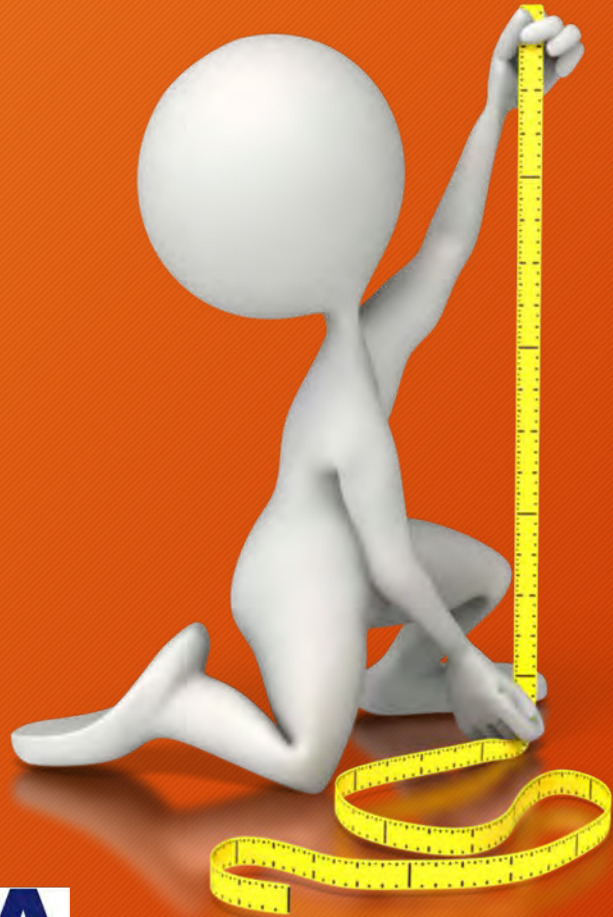
# Why don't we do these TODAY when we know we should?

- Start an exercise program.
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Look at each one of your “reasons” (excuses), and assess it:

Lack of importance?  
Lack of confidence?  
Bad timing right now?





Part of case management meetings need to evaluate the participant's: readiness, willingness, and confidence to make a change or continue to make a change.



“

I want to start by asking you some questions to help me to understand what sorts of things you are interested in and how this program might be able to support you in achieving your goals. Does that sound like a good place to start?”

# Assessment of Readiness to Change

- **Willing/Priority**

- What kind of life do you eventually want for yourself and/or your family?
- What kinds of things do you need to do to make that happen?
- How does this program help you to get there?
- What would be some advantages of working (or going to school) right now?
- How important is (goal) to you on a scale of 0-10?

- **Able/Confidence**

- How confident are you that you can (reach goal or complete school or get a job)?
- What do you think could get in the way?
- What in your life is going really well?
- How are you feeling about the progress that you are making and what you have left to do?



- **Ready/Time is Right**

- If you decided you wanted to go to school or get a job, what steps would you need to take?
- What next steps, if any, do you feel ready to take?
- What changes, if any, are you think about making?



# Analysis of Questions



- How are these questions different (if at all) from the type of questions generally asked of participants?
- Who elicits “change” talk?
- Who owns the problem?
- Who solves the problem?
- Who makes the decisions?
- Who decides what the next step is?
- Who is more empowered by the conversation?



## Change Talk: Our Goal

- Elicit “change talk” from participants.
- Increase the frequency of change talk to strengthen the intention to change.
- Have participants (rather than us) make the arguments for a particular change.



# Evoking Change Talk

**Ask open ended questions.**

Closed Questions DO NOT evoke change talk!



# Compare these two questions

- What is the highest grade that you completed?



- Talk to me about your schooling and education from high school to present.

# Closed Versus Open Questions

1. Have you been in a program like this before?

Tell me about your experience being in (OWF, WIOA) before. What worked for you in the program and what didn't work?

1. Have you been applying for jobs? Where?

When you have looked for jobs before, what has been successful for you? How did you go about it?

1. If offered employment can you begin working immediately?

If an employer offered you a job and the start date was tomorrow, what would you have to get organized in your life so that you could begin work?

1. Do you know what career field you want to go into?

Talk to me about jobs or careers that interest you. What attracts you to that type of work?

# Key Skill: Identifying “Change Talk”



**Customer talks about the disadvantages of his/her current situation.**

**I want to not worry about keeping the lights on.**

**I feel trapped.**

**I don't have enough money to live on.**

**Customer talks about the advantage of making a change.**

**I could have less stress financially if I got trained for a medical job. There is always a need for nurses.**

**My family would be happier.**

**I think I would actually like helping people and this career would give me that chance.**

**Customer talks about steps they have already taken.**

**This week I started to work on my resume.**

**This week, I set aside 1 hour a night to study.**



# Activity

## Identifying Change Talk



Listening for “Change Talk” (Identify those statement that are “change talk” versus “sustain talk”).

1. I can't live like this.
2. I am not going to XYZ and that is final!
3. I want a better life for my kids.
4. I called the school.
5. I haven't thought about it. I have a lot of other things going on right now.
6. I am just not ready to do anything different.
7. I need to get a job.
8. I want to be a medical assistant.
9. I have tried that before and it didn't work so I am not really interested.
10. I worry about my children and want them to do something with their lives.
11. I don't have time for this.
12. I can manage on my own without any help but thanks.
13. I wish things were different.



## Listening for “Change Talk”

“**change talk**”  
“Sustain Talk”

1. I can't live like this.
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# Simple Motivational Interview in Diagram

## Change Talk

- Case Manager: Evokes change talk through use of open-ended questions
- Participant: Makes Change talk

- Case Manager responds to change talk
  - Reflective Listening
  - Affirmation

- Case Manager asks for permission before providing suggestions, information, or ideas
- Case Manager summarizes discussion

# On-Going Case Management



## Uninspired Meeting Agenda (Transactional)

- Update of what I have done since the last meeting.
- Collect documents from me.
- Get grades, schedule, etc.
- Get cash, check, gift card or voucher for needs.
- Set up next meeting.



## Engaging Meeting Agenda (Relationship Building)

- Discuss my dreams and the goals that we set.
- Ask me questions about how I feel about my progress at whatever activity I am in.
- Update progress I have made since the last meeting. Ask me what I feel good about.
- Set a plan for what I want to do next.
- Find out what help that I need.
- Collect documents/Issue vouchers/Double check contact information
- Set up next meeting.

# Highlights of Building Motivation



- Everybody enters program at different stages of readiness to change.
- Style of the career coach matters.
- Listen for change talk.
- Respond to change talk with reflective listening and affirmations.
- Ask open-ended questions.
- Relationships can be built virtually!



# It's A Philosophy, A Mindset, A Framework

## Building Motivation:

- Reduce Stress
- Create Strong Relationships
- Build Core Skills



# Questions



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