Trainer's Notes

Building the BEST Connections in Case Management

Purpose
Establish foundational case management practices for new W-2 Case Managers in the areas of assessment and Employability Plan development.

Objectives
Upon completion of this course, you will be able to:

- Discover the BEST approach to guide conversations with participants regarding:
  - assessment,
  - Employability Plan goals and activities, and
  - accommodations;
- Recognize the ongoing connection between assessment and Employability Plan goals and activities;
- Break down a goal into smaller goal steps using SMART goal criteria;
- Explain the benefits of all goal types for workers and participants;
- Compare activity code definitions using the W-2 Manual and example descriptions;
- Select accommodations based on participant needs; and
- Choose accommodation descriptions that include what, why, when, how, and who.

Table of Contents

Materials

- Computer, LCD projector, clicker, and portable speakers
- Building the Best Connections in Case Management PPT (enable sound for videos)
- Sign-in sheet (one for each day)
- Evaluations (located on the ECM curriculum page)
- Cardstock for name tents
- Table top items
- Flip chart paper and markers
- Painter's Tape
- Buzzers/Chimes/Bells – one per table group
- Quiet music to play during independent activities
- Dry erase paddles and markers (one per learner)
- Website Link – AskJan: https://askjan.org/

- Goals Benefits Showcase:
  - Laminated Goal Types
  - Clothespins or stands
  - Blank paper
  - Various props (examples: graduation cap, trophy, ribbon, toy car, doll, clock, play money, other dollar store items)
- Breaking Goals into Steps
  - Printed goal descriptions
  - White cardstock (cut into strips)
  - Colored markers (one color per group)
  - Painter's tape
- Applying BEST to Goals Activity
  - Copies of the W-2 Manual Appendix – Activity Codes for each learner (in page protectors and clipped together)
  - Four sets of Round 1 and Round 2 Activity Codes and Description cards (printed and laminated)
- W-2 Assessments: Mix, Match, and Master
  - Slips of paper with assessment types, assessment definitions, and assessment examples
  - W-2 Assessment Answer Sheet
- Making the Connection
  - Case file (includes basic case information, Informal Assessment summary, PIN comments, current EP summary) – at least 2 copies for each group
  - Blank Agenda Map
  - Copies of the additional information
- Wrap-up
  - Loosely rolled ball of yarn
  - Photo of a family (to represent the families participating in the W-2 program)

Materials Preparation – Day One

- Defining Assessment and Case Management – prepared flip chart paper ('Assessment' written at the top of two pieces; 'Case Management' written at the top of two pieces)

- A-Z Cues Activity – prepared flip chart paper with the letters A through Z for each table group

Materials Preparation – Day Two

- Applying BEST to Goals – Four sheets of flip chart paper, each with a BEST area written on it (Balance, Exploration, Sensitivity, Trust)

- Accommodations Brainstorm Blast – Four sheets of flip chart paper, each with a BEST area written on it (Balance, Exploration, Sensitivity, Trust)

Suggested Pace

This is a 12-hour course. The following agenda is the suggested pace for each day.

Day 1

9:00 – 9:20: Opening through Six Word Memoir
9:20 – 9:45: Assessment and Case Management through Principles of Assessment
9:45 – 10:25: Using the BEST Approach with Assessment Principles through Exploration
10:25 – 10:40: Break
10:40 – 11:15: Sensitivity through BEST Video
11:15 – 11:50: Applying Assessment Principles to W-2 Assessments through Applying BEST to W-2 Assessments
11:50 – 12:20: Going Beyond What's on the Page through Job Readiness Follow-up Questions
12:20 – 1:20: Lunch
1:20 – 2:00: Using Reflections and Cues through W-2 Assessments Summary
2:00 – 2:40: Applying Assessment Principles to EP – Goals through SMART Goals
2:40 – 2:55: Break
2:55 – 3:50: Breaking a Primary Employment Goal into Steps through Day 1 Wrap Up

Day 2

9:00 – 10:05: Day 2 Welcome through Goals Summary

10:05 – 10:50: Applying Assessment Principles to EP Activities through Analyzing Activities (Round 1)
10:50 – 11:05: Break
11:05 – 12:20: Analyzing Activities (Round 2) through Activities Summary
12:20 – 1:20: Lunch
1:20 – 2:15: Applying Assessment Principles to Accommodations through Accommodations Summary
2:15 – 2:30: Break
2:30 – 3:45: Making the Connection Activity through Wrap-Up

Note to Trainer: We do not have time built in for a whole group introduction. Table group introductions are in the six-word memoir activity. Please encourage learners to introduce themselves to each other any time you put them in groups that are not table groups.

Welcome/Introduction

☼ PPT 1

Thanks for joining us for Building the BEST Connections in Case Management!

The topics in this course relate to a quote from poet and writer David Whyte.

☼ PPT 2

He said, "A real conversation always contains an invitation. You are inviting another person to reveal herself or himself to you, to tell you who they are or what they want."

Over the next two days, be prepared to learn how to apply the principles of assessment to W-2-specific assessments, goals, and activities. You'll also discover how using the BEST approach will enhance your conversations with participants in these areas.

Learning Objectives Code

☼ PPT 3

PG Cover

Let's start by looking at the learning objectives on the cover of your Participant Guide. Read through these and mark them as follows. Draw a star next to any learning objective you're excited to learn more about. Draw a check mark next to the ones you might find challenging as a Case Manager, and draw a question mark next to the ones you're curious about. You have two to three minutes to do this.

The good news is you won't have to wait for long, as we'll be exploring all of these.

Six-Word Memoir Activity

☼ PPT 4

PG 4

Purpose: Learners experience an assessment process where they provide personal information on short notice.

Materials: None

Estimated Length: 20 minutes

Directions to Trainer:
Part 1: Allow 3-5 minutes for learners to make their list of words and phrases.

Part 2: Share the background and examples of the six-word memoir. Give learners 2-3 minutes to create a memoir. Trainer should be prepared to share their own memoir.

Part 3: In table groups, instruct learners to share their memoir with the group. Give them 2 minutes.

Trainer Instructions to Learners: We'll jump right into the topic of assessment with an activity.
Part 1: In your Participant Guide, write down as many words or phrases you can think of to describe yourself: how you see yourself; your strengths; your weaknesses; your likes, interests, and life experiences; your relationship to others; how you see the world. I'll give you a few minutes for this.

Part 2: According to literary legend, novelist Ernest Hemingway was challenged to write a short story, using only six words. The story he produced stated, "For sale: baby shoes, never worn." In 2006, writers for the U.S. based online story-telling website, SMITH Magazine, personalized this challenge and added a twist, encouraging readers to write their life memoir using only six words. Since then, the Six-Word Memoir has become popular with all types of writers, both famous and obscure. Let's look at some six-word memoirs.

Learned more from poverty than wealth.

I'm so tired I'm awake again.

It all changed in an instant.

We would have named him Xavier.

I can't keep my own secrets.

Not quite what I was planning.

Next, use the words and phrases you wrote down to describe yourself to create your memoir, using only six words. Your memoir can be a sentence, or a simple phrase or phrases. Record the memoir at the bottom of your Participant Guide. You will share your memoir in your table groups. You have 3 minutes to write your memoir. I'll share my memoir to help get you started.

Note to Trainer: Share your memoir, offering no additional explanation.

Part 3: At your tables, take turns introducing yourself and then share your memoir. Offer no additional statements or explanations regarding your memoir. As each group member shares their memoir, don't ask questions or offer any comments.

Debrief Questions
Let's go over a few questions together.

1. How did it feel to craft your personal memoir, then be told you have to share it with someone?
2. How might this experience correlate to how a participant may feel during an initial appointment?

This opening activity allowed you the opportunity to experience how participants may feel at their initial appointment with you, when meeting their worksite supervisor, or when working with other professionals. For some, it may be easy to talk about themselves; for others, this can be an uncomfortable experience.

It's important to remember that assessment is about gathering information to uncover the whole story, and not making assumptions about who someone may or may not be. We'll talk about what information we gather, how we approach these conversations, what we do with the information, and how all these pieces fit together.

Assessment and Case Management

PPT 5

Assessment serves as a foundation for case management. As a Case Manager, you're constantly assessing, sometimes without even realizing it.

Defining Assessment and Case Management

PG 5

Purpose: Learners define the terms 'Assessment' and 'Case Management,' noting the similarities and differences between them. Learners make connections between Assessment and Case Management.

Materials: Prepared flip chart paper ('Assessment' written at the top of two pieces; 'Case Management' written at the top of two pieces), flip chart markers

Estimated Length: 15 minutes

Directions to Trainer: Hang the prepared flipchart paper on opposite sides of the room. Divide learners into four groups, provide them with a flipchart marker, and send them to one of the papers on the wall. After the activity, leave the flipchart papers on the wall to refer to throughout the class.

Trainer Instructions to Learners: Throughout today and tomorrow, we'll be talking a lot about case management and assessment.

In a moment, we'll divide you into four groups. Two groups will focus on assessment, and the other two groups will focus on case management. With your group, brainstorm words, phrases, and examples that relate to your assigned word. Record your responses on the flip chart paper. You have 5 minutes.

PPT 6

Let's hear from each group. As the other groups report out, circle any similarities you hear from the other group that has the same word as your group. Star the similarities you hear from the other two groups.

Ask What are some of the items you circled? What are some of the items you starred?

Ask Based on what we just discussed, how do case management and assessment fit together?
Possible responses:
- *Not something we do to participants, but with them.*
- *Participant-centered*
- *For the participant's benefit*

These examples provide the framework for the next two days as we continue to discuss the relationship between the principles of assessment and case management.

PPT 7

PG 5

There are three main principles of assessment: *gathering the information*, *having the conversation*, and *acting on the information*. Let's look at each of these principles in more detail.

PPT 8

You've defined what assessment is, but how and where do we get this information? Case Managers are not the only workers who gather assessment information as a vital aspect of their job duties. Teachers, scientists, marketers, and data analysts are just a few examples of other professionals who continually gather assessment information.

Note to Trainer: Record answers to the question below on a whiteboard or flipchart paper.

Ask What are some ways people gather assessment information?
Possible Answers: Questionnaires, Forms, Interviews, Research, Surveys, Observations, Review Existing Data, Tests, Exams, Scoring Rubrics, Self-Assessments, Conversations/Asking Questions

As you can see, there are many ways to gather assessment information. But, gathering the information alone is not enough; we need to discuss the information. This leads us to the next principle of assessment: having the conversation.

PPT 9

Many of the ways you identified that people gather assessment information involve conversation. Not only can we use conversation to begin the process of gathering assessment information, but we also can use it to keep the conversation going and ask clarifying and follow-up questions to get deeper, more meaningful information.

Later in this course, we'll discuss specific strategies for effective conversations regarding aspects of case management.

☼PPT 10

After teachers, scientists, marketers, and data analysts gather assessment information, they don't simply file it away unexamined. They act on the information. For example, a teacher may use test results to adjust learning plans or guide the conversation at a parent-teacher conference, and provide resources based on their students' needs. The same principle is true in case management.

As you'll see throughout the next two days, gathering information, having conversations, and acting on assessment information creates continuous connections between other areas of case management. These connections may move in a cyclical manner or in a non-linear manner.

☼PPT 11

For example, a conversation you have with a participant during an informal assessment may lead to the request for a formal assessment. The results of the formal assessment may inspire you and the participant with ideas for new activities to assign on the Employability Plan. You later review participation tracking information and have a discussion with the participant about their progress in the new assigned activities. This discussion uncovers a transportation barrier and requires an update to the Employability Plan, and so on.

This is just one example of the continuous nature of assessment.

Remember, assessment is not a "mechanical" process. We work with individuals, and we need to individualize our approach to best suit the participant with whom we're working.

Using the BEST Approach with Assessment Principles

PPT 12

PG 6

Now that we've gone over the Principles of Assessment, let's talk about how you can use the BEST Approach to guide conversations with participants.

It's important to use a conversational approach to engage participants, as opposed to conducting an interrogation. If participants feel you're interrogating them, they may become defensive or shut-down, which negatively impacts your relationship with them and hinders your ability to gather the information you need. BEST stands for *Balance*, *Exploration*, *Sensitivity*, and *Trust*.

Practicing the BEST approach from the start helps you build rapport with participants from your first interaction. Applying the BEST approach throughout the duration of the participant's time in the W-2 program helps you to:
- Gather quality information, which allows you to continuously assess participants' needs, and
- Act on that information to adapt your case management approach to fit participants' unique needs.

Balance

PPT 13

PG 7

As a Case Manager, it can be hard to find a balance when you face many expectations as part of your job. You have timelines you must adhere to, deadlines to meet, appointments to schedule, meetings to attend, and more.

PPT 14

There are policy requirements, agency requirements, and the participant's needs. It can be daunting to figure out how to meet all these expectations, and ensure participants are receiving the services they need to be successful.

PPT 15

When meeting with participants, ask yourself if you're asking questions just to fulfill a policy obligation, or also to build a better understanding of their situation.

PPT 16

With the BEST Approach, Balance refers to creating opportunities for you to gather the information you need while allowing participants the opportunity to discuss what they need.

☼ PPT 17

This means you're concerned equally with gathering the necessary information you need to effectively do your job, and making a commitment to understand a participant's current situation.

☼ PPT 18

You practice Balance by engaging participants in back-and-forth conversations. Encourage participants to elaborate on their answers, as this gives participants the chance to talk about more than just the questions you're asking. You can assist in guiding the conversation by asking follow-up questions. Try using open questions or statements that encourage participants to offer more information. Some examples include: How did that make you feel? What would you do differently? Tell me more about that.

It's also a good idea to wrap up the conversation by asking a question such as "What else do you want me to know about…" This gives the participant a final chance to share anything else on their mind.

Ask What are some other examples of open questions you may ask participants?
Possible Responses:
- *Why do you think that happened?*
- *Describe what that situation was like for you.*

Agenda Mapping

PPT 19

PG 7 (bottom half)

Another technique you can use to apply Balance to your case management skills is agenda mapping. This tool aids in practicing Balance by allowing both you and the participant to map out the topics to cover during their appointment. You start by preparing a bubble sheet with the topics you need or want to go over with the participant. Leave at least 1-2 bubbles blank for the participant to fill in what they would like to cover that's not already on the bubble sheet.
With the participant, choose or rank the top items to address during the appointment. As you both address topics, check off or cross out the completed items. If you cover all the top priorities, move on to other topics as time allows.

On the other hand, if you and the participant are unable to cover all the topics, work together to figure out a plan to address the remaining topics. This may include scheduling an additional appointment, touching base by phone or email, or simply carrying the topic or topics over to the participant's next ongoing appointment.

In addition to creating Balance, agenda mapping is a way for you to encourage collaboration and partnership with participants and may help you to build and maintain a positive working relationship.

Ask How could you use agenda mapping when meeting with participants over the phone or virtually?
Possible Responses:
- *Share screen or whiteboard over virtual meeting*
- *Start appointment by telling the participant what you need to cover, and also ask what they hope to accomplish*

This is just one tool that can be useful when applying Balance. Throughout the next two days, we'll talk more about applying Balance to various aspects of case management. The next part of BEST is Exploration.

Exploration

☼ PPT 20

PG 8

Assessments typically consist of a set of questions. Participants may answer these questions, or an assessor may answer these questions by recording their own observations. With BEST, Exploration goes beyond the standard approach to assessment, and delves into the participant's needs, family circumstances, resources, and possibilities.

☼ PPT 21

You might be wondering, "What does Exploration look like in case management?" Practicing Exploration as a Case Manager means you allow additional time to further explore assessment results. One way to do this is to check for understanding on both sides, meaning yours and the participant's.

Do you understand the assessment results? Is there anything that does not make sense, or that you question? What other information do you need to better understand the participant's needs?

It's equally important that the participant understands their assessment results, as they may have similar questions. Work with the participant to create a safe space for them to ask for and add additional information. Go beyond simply asking the required assessment questions or only asking, "Any questions?" at the end of an appointment.

☼ PPT 22

To gain a better understanding of the participant's situation, practice active listening and look for cues, both non-verbal and verbal, to assist in crafting your follow-up questions or responses.

When a participant is talking, be present and genuinely listen to what they are saying in the moment. Try to avoid thinking of your response until after you've heard from the participant. Give the participant time to respond.

Active Listening

PPT 23

PG 8 (bottom half)

Purpose: Learners practice active listening by looking for verbal and non-verbal cues to formulate follow-up questions.

Estimated Length: 25 minutes

Directions to Trainer: Instruct learners to get into groups of three or four. Set a timer (5 minutes for groups of 3 and 4 minutes for groups of 4), and tell groups when to switch. Allow 15-16 minutes for groups to work together, then allow 5 minutes for discussing the questions in their Participant Guide within their groups.

Trainer Instructions to Learners: We're going to take some time to practice active listening by looking for verbal and non-verbal cues and use those cues to ask additional questions by engaging in a real-play experience. A real-play differs from a role-play, in that you're being you, so you're asking and answering questions as yourself, rather than playing a role.

You will be working in groups of 3-4. All group members will have the opportunity to ask questions, answer questions, and observe. If you're in a group of 4, everyone in the group will have two opportunities to observe. Let's take a moment to look at the responsibilities of each group member.

Talker – Choose to answer one of the following questions, and any follow-up questions Listener asks:

- How do you define success?
- What's your most used phone app?
- How did you choose your career?
- What's your favorite season?

Listener – After the Talker gives their initial answer to their chosen question, ask follow-up questions, based on their verbal and non-verbal cues, to gain more information and insight.

Observer(s) – Observe the interaction between the Talker and the Listener, and note your observations in your Participant Guide. Pay attention to the Talker's verbal and non-verbal cues and note the follow-up questions the Listener asks based on these cues.

Each interaction will take 4-5 minutes, depending on your group size. Trainers will tell you when time is up and to rotate roles. Keep talking until your time is up. After your final rotation, answer the questions in your Participant Guide, then discuss your answers with your group.

Debrief Questions

- What types of questions did the Listener ask based on the Talker's verbal and non-verbal cues?

- What additional information did the Talker provide as a result of the Listener's questions?

When practicing active listening and asking follow-up questions, you may try asking open questions or using reflective statements and summaries to check for understanding. We'll talk about both of these a little later.

Making reflective statements or summaries is similar to paraphrasing what the participant said, and helps to ensure you have the right information. When you make a reflective statement, the participant essentially hears what it is that they just told you. If your statement rings true, the participant likely will agree and move on with the conversation. If what you said is not correct, the participant typically will let you know, then provide clarification to help you better understand.

This leads us to our next step, Sensitivity.

Sensitivity

PPT 24

PG 9

When using the BEST approach to guide conversations, Sensitivity means that you acknowledge the participant's needs, yet challenge them on the functional realities they, or members of their family, may face. You may be the only person who appropriately challenges the participant to step out and take a chance.

Practice Sensitivity by meeting participants where they are at. To do this, use cues from the participant. Listen to what they're saying, and what they're not saying. This goes beyond what they tell you verbally. What about the non-verbal cues? If you're meeting with a participant in person or via video call, you can use body language to see what they may not be saying out loud. Does the participant seem interested? Excited? Nervous? Reluctant?

If you're meeting with a participant over the phone, you need to be especially attentive to vocal cues. Does their voice increase in speed or pitch when discussing a specific issue? Are there long pauses, or do they seem to be struggling to find the words they want to express? Do they try to stick to one-word answers?

Ask What cues did you notice during the real-play interactions?

A to Z Cues Activity

☼ PPT 25

Purpose: To quickly brainstorm a creative list of verbal and non-verbal cues.

Materials: Prepared flip chart paper with the letters A through Z for each table group, flip chart marker for each table group.

Estimated Length: 10 minutes

Directions to Trainer: Allow groups 90 seconds to create their list of verbal and non-verbal cues. Inform groups when to begin and when time is up. Review the lists, and give each group one point for every unique cue they listed that's not a match to another group.

Trainer Instructions to Learners: Continue thinking of all the verbal and non-verbal cues you may notice when working with participants. We're going to have a competition to see which table group can come up with the most cues. Here's the catch. The cues must be unique. If another group comes up with the same cue, it will not count. Also, you need to come up with one cue that starts with each letter of the alphabet. The cue can be a word or a phrase. For example, for the letter A, you could write, "Avoids eye contact." Try to come up with unique answers. Select one person at your table to record your answers on your group's flip chart paper. You will have only 90 seconds to create your list.

Note to Trainer: **Click** to start timer. Go through the lists and add up the points to determine the winner.

☼ PPT 26

When you notice one of these verbal or non-verbal cues, ask follow-up questions to help you determine where the participant is at and how they're feeling right now. You may need to adapt your conversation approach based on the participant's needs and comfort level.

Another way to practice Sensitivity is by validating the participant's concerns. Recognize their thoughts and feelings, and acknowledge them as important and valid. Address the concerns, but don't dwell solely on the problems. Use affirmations to focus on the positive, and adopt a strengths-based style of conversation.

We mentioned that Sensitivity encompasses not only acknowledging the participant's needs, but also challenging the participants. What does challenge look like in this context? The answer is: it depends on the participant. An appropriate challenge is unique to each individual. Some participants may be ready for a gentle push toward a big life change. Other participants may be ready to take only slow baby steps. Later in this course, we'll talk more about incorporating appropriate challenges with goal steps and activities.

Trust

PPT 27

The final part of BEST is Trust. In this context, Trust entails establishing clear roles and responsibilities for both the participant and you, and laying out a realistic picture of resources and options.

Honesty is an integral part of Trust. For example, if a participant asks you a question and you don't know the answer, admit it. But be sure to do what you can to find the answer and follow up with the participant.

Another example of practicing Trust when guiding conversations is to never make promises you can't keep. Additionally, always follow through on your commitments, just as you expect participants to follow through on theirs.

You practice Trust by empowering participants, not enabling them. Enabling someone means doing something for them, and empowering them means teaching them to do it for themself. Here's an example:

PPT 28

Participant: I can't write a resume. I've never done it before. I don't even know where to start.

Enabling Response: No problem. I've written tons of resumes. I can take the work history information from your informal assessment and craft a resume for you in no time. Then you'll be able to see what a resume should look like.

☼ PPT 29

Empowering Response: Our Job Developers offer a resume writing workshop every Tuesday at 10:00. They explain the different types of resumes and share examples. They also discuss what to include on your resume, and how to highlight your strengths. You even get one-on-one help and feedback while creating your own resume. Does that sound like something you would be interested in?

Another way to empower participants is to help them assess and build their support network. This includes people who can provide personal support, people who can provide professional support, and other community agencies that can provide resources and services.

BEST Conversation – Tara's Interview

☼ PPT 30

PG 10

As you can see, BEST is a collaborative conversation, not a scripted conversation or an interrogation. Let's put all the pieces together by watching a brief video of a conversation between a Case Manager and a participant, which uses the BEST approach. As you listen, write down examples in your Participant Guide of the Case Manager using the BEST approach.

Click to play the video.

Ask In what ways does Tara's interview demonstrate the BEST approach?

Balance:
Possible responses:
Gather information, gathering Tara's perspective on her experiences

Exploration:
Possible responses:
Help Tara explore if there are other possible explanations to what she observes, other perspectives

Sensitivity:
Possible responses:
Guide Tara to her own aha moments

Trust:
Possible responses:
Provide realistic options and possibilities

The principles of assessment and the BEST approach are woven throughout the rest of this course. You'll notice how these concepts tie into each new piece we discuss. Sometimes they're obvious; other times they're subtle.

Applying Assessment Principles to W-2 Assessments

☼ PPT 31

Now that we have the foundation of assessment principles and the BEST approach, let's see how they apply to W-2-specific assessments.

Types of W-2 Assessments

W-2 Assessments: Mix, Match, and Master

☼ PPT 32

🗎 PG 11

☞ TN Appendix A

Purpose: Learners recall the different W-2 assessments they learned about while in New Worker Training.

Materials: Slips of paper with the assessment types, assessment definitions, and assessment examples (one item per slip of paper)

Estimated Length: 10 minutes

Directions to Trainer: Hand out one slip of paper to each learner. Learners find their matches, then verify that they are correct. If learners have two out of three correct, tell them which pieces are correct and send them out to look for the missing piece. When everyone is finished, review the answers with the large group.

Suggested Modification: If there are not enough learners for all the slips, you may have trainers participate, eliminate the examples (learners match only the type and definition), or put the extra slips on a table. If there are more learners than slips of paper, have one or two learners be the designated answer checker. There is an answer sheet in TN Appendix A.

Trainer Instructions to Learners: First, we're going to take a few minutes to review the W-2 assessments you learned about in New Worker Training. Each of you will receive at least one slip of paper with a W-2 assessment type, definition, or example. Move around the room to find the people who have the matching pieces to your slip of paper. After you believe you've found a match, bring them here so we can check them.

A complete match includes an assessment type, definition, and example. If they're not a match, we'll send you back out to keep looking.

Answers:

Informal Assessment

- Definition: An ongoing case management practice that starts during the W-2 application period and continues until the individual no longer receives W-2 services.
- Example: Having a conversation with a participant during an ongoing appointment.

Formal Assessment

- Definition: Establishes the extent and severity of any disabilities or other concerns that may interfere with normal functioning in an employment setting or with a person's ability to meet W-2 program requirements.
- Example: A report from a doctor indicating restrictions and accommodations for the participant.

Career Assessment

- Definition: Obtains a greater awareness about an individual's work styles, skills, and interests.
- Example: O*Net Interest Profiler

Job Readiness

- Definition: Gathers information about how ready an individual is for employment, including information about work preferences, history, applications, interviews, and contacts.
- Example: What kind of job would you like? Are there any job or work situations you prefer to avoid?

Educational Needs

- Definition: Determines if the individual needs, or would benefit from, education or training activities, including a course of study for the granting of a declaration of equivalency of high school graduation.
- Example: TABE

Vocational Assessment

- Definition: Helps individuals living with a disability establish realistic employment goals and a plan to achieve them.
- Example: A report from DVR (Department of Vocational Rehabilitation) that may include an answer to 'What services do you think you might need to reach your employment goal?'

You can see that the W-2 program has a variety of assessments. Sometimes, participants might question why you need all this information when all they want to do is find a job. It's crucial that you get participant buy-in as to how these assessments can help with their employment goals.

PPT 33

Ask In thinking about the informal assessment, how can this type of assessment benefit the participant? Grab one dry erase paddle for your table. As a table group, come up with one idea that is 1-5 words, and write it on your paddle. You have 60 seconds. When we tell you time is up, hold your paddle in the air for everyone to see.

Look at what each group had to say. Now, let's do the same for a formal assessment.

PPT 34

Ask How can this type of assessment benefit the participant? Write an answer on your dry erase paddle and hold it up.

Note to Trainer: Repeat this process for each type of assessment (career, job readiness, educational needs, vocational). Go to the next PPT slide for each assessment type. The trainer does not need to go through the answers; learners can just look quickly around the room at each other's answers.

Applying BEST to W-2 Assessments

PPT 39

PG 12

We use these assessments to gather the information we need to work effectively with W-2 participants. The W-2 program has forms and systems, such as WWP, to not only help gather that information, but also to start the conversation with participants. The BEST approach can help you better guide these conversations. Let's talk about how to use BEST when discussing W-2 Assessments.

☼ PPT 40

Practicing Balance may start before you meet with a participant. It's a good idea to review their case, determine the topics you need to cover, and prepare for the conversation. An additional way you can prepare is to familiarize yourself with commonly asked questions. This includes the questions on the **Informal Assessment** pages and **Job Readiness** page. Being familiar with these questions helps the conversation flow with ease, as you can engage the participant without appearing to simply read the questions from the screen and record the participant's answers.

After you have the assessment results, take the time to thoroughly review the results to ensure you have a good understanding of what the results mean and the impact on the participant. As you review the results, be sure to make notes of any key points to discuss further with the participant and any areas you may need to follow up on. Remember, you ask the necessary questions to gather information, then use the cues you observe to determine your next steps. This may consist of asking additional questions, requesting a formal assessment, providing resource information, or making referrals for additional services.

Balance also means that you ensure the participant can ask any questions or share their own thoughts or concerns regarding assessment results. Allow participants time to discuss their current situation and prepare to be flexible and willing to adapt to their needs.

☼ PPT 41

This leads to further Exploration. You may find that you must go beyond asking the participant for additional information and collaborate directly with the person completing the assessment. This includes medical or mental health providers, AODA providers, Domestic Violence advocates, DVR workers, and worksite supervisors. Throughout this process, **continue** to discuss the results with the participant, and provide them with the opportunity to share their thoughts, ask questions, or dispute findings, all of which may lead to the need for further assessment.

☼ PPT 42

Next up is Sensitivity. It's important to practice Sensitivity during all conversations with W-2 participants, but it's especially important during assessment conversations. For example, during informal assessment, we ask questions that can feel invasive. You can practice Sensitivity by employing compassion and empathy during these conversations.

Another way to practice Sensitivity is by allowing participants time to process assessment results. For example, a participant may receive information on a formal assessment that they weren't expecting, or that they don't agree with. In this situation, you may need to set up an additional appointment to give the participant more time to process the results and give you both more time to thoroughly discuss the results, the impact they will have, and the participant's options going forward.

☼ PPT 43

Finally, we have Trust. It's imperative to practice Trust during assessment conversations. The first way you can do this is by thoroughly explaining the assessment process – no matter what type of assessment it is. Allow the participant time to ask any questions. Always remember that you're speaking to a unique individual; be aware of their prior knowledge of assessment, and their learning style. This might mean that you need to slow down and take more time to explain the assessment process than you had planned originally. Even though it may be your fifth time explaining assessment this week, it's likely the participant's first time hearing about it.

At times, you may experience instances when participants are reluctant to engage in assessment conversations. Trust usually can help in these situations. First, work consistently to build rapport every time you speak with the participant. People are more likely to share information with you when they feel comfortable with you. Second, let them know why you're asking for the information and how you're going to use it. People may fear that you'll share the information with others, or that their answers will impact their eligibility. Having this knowledge may ease their fears.

Another example of how you can practice Trust during assessment conversations is by defining the roles of everyone who is involved in the process. This includes the participant, the Case Manager, and the assessment provider or providers. Providing knowledge is important, but so is continually building a trusting relationship with the participant. As Theodore Roosevelt once said, "People don't care how much you know until they know how much you care."

Going Beyond What's on the Page

☼ PPT 44

PG 13

W-2 Assessments offer a good starting point with initial questions to learn about the participant. But, we need to go beyond what's on the page.

Asking Follow-Up Questions

Remember, this is a conversation, not an interrogation. Reading question after question on the page may not feel like a conversation because many of the questions require yes or no answers. You can make the assessment process more conversational by asking follow-up questions to gather additional details. Asking follow-up questions is one way to show that you're listening to the participant, and that you care about what they're saying.

For example, during the Job Readiness assessment, you ask, "Do you have an email address that employers can use to contact you?" The participant can answer yes or no, but you can dig deeper by asking them to share their email address with you and how often they check their email. Additionally, ask a follow-up question whenever you notice verbal or non-verbal cues indicating there may be more to what the participant has told you.

Here are some examples of follow-up questions you may ask while having a conversation during the **Informal Assessment**.

☼ PPT 45

Work Programs:
- Tell me more about your experience in WIOA.
- What's the most important skill you learned from that program?
- Are you interested in learning more about any of these programs?

☼ PPT 46

Education History:
- How did you feel about school?
- Are you interested in furthering your education?
- What was your favorite subject in school?

☼ PPT 47

Participant Barrier:
- Tell me about your support system to help with this barrier.
- What successes have you had in the past when dealing with this issue?
- What do you need from me to help you complete your W-2 activities?

Note to Trainer: If mentioned, the only time it is not appropriate to ask follow-up questions during the WWP Informal Assessment is during the Domestic Abuse Screening questions. Chapter 5.6.1 of the W-2 Manual states, "If the W-2 worker determines that it is safe to ask the Domestic Abuse Screen questions, the W-2 worker must first read the initial statement to the applicant or participant as it is written. The W-2 worker must also read each screening question to the participant exactly as it is written in WWP." However, workers may ask follow-up questions after the screening is complete.

☼ PPT 48

These were a few examples of follow-up questions, but how do you use these in a conversation with a W-2 participant?

Creating Open-Ended Questions

Our first tip is to use a mix of closed and open-ended questions. Open-ended questions are questions that require more than just an automatic, or one-word answer. Open-ended questions often start with: What…? How…? Tell me about…? Or Describe….

"How are you doing today?" is an example of a closed question. Although this question starts with the opener, "How," it usually does not elicit more than a one-word response. An example of making this question open to elicit further discussion is, "Tell me about your day so far."

PG 13 (bottom half)

Now it's your turn to practice taking closed questions and opening them up. Find a partner and take the next couple minutes to re-write the questions in your Participant Guide so that they encourage further conversation.

Note to Trainer: Continue until six minutes have passed, or most of the class is finished. Ask volunteers to share their responses.

Let's hear what you came up with.

- How is your job search going?

Possible answer: Tell me about your job search. What has been working well with your job search and what has been a challenge?

- Did you do what you were supposed to do?

Possible answer: What have you worked on since our last meeting?

- Did you have any job interviews this week?

Possible answer: What kinds of responses have you received from employers this week?

- Do you have a back-up plan for childcare?

Possible answer: How would you handle it if your childcare provider got sick and couldn't care for your kids?

- Did you call the worksite to tell them you weren't going to be there?

Possible answer: What's the best way to let the worksite know you can't attend?

You can see how open-ended questions invite deeper conversation. However, that doesn't mean that closed questions are always bad. They have a place in our case management practice. For example, sometimes you need to start out with closed, information gathering questions to initiate the conversation. From there, you can use open-ended questions and follow-up questions to dive deeper.

Job Readiness Follow-up Questions

PPT 49

PG 14-16

Purpose: Learners brainstorm follow-up questions to ask on the **Job Readiness** page in WWP.

Materials: None

Estimated Length: 15 minutes

Directions to Trainers: Divide the class into 5 groups and assign each group one section of the **Job Readiness** page (Work Preferences, History, Application, Interview, Contact). Give them ten minutes to complete their lists. At the end of the ten minutes, have groups report out.

Trainer Instructions to Learners: Now it's your turn to come up with follow-up questions. We're going to separate you into five groups and assign each group one section of the **Job Readiness** page. First, review the existing questions in your assigned section. You can find the questions in your Participant Guide. Then, as a group, come up with at least ten follow-up questions for that section that you could ask participants. Try for a mix of closed and open-ended questions. You have ten minutes. The person in your group wearing the brightest color will be the scribe and spokesperson.

Work Preferences Questions

Potential questions:
What type of hours would someone with that position have?
What about that job may not interest you?
How long do you think training would take to complete?
How could you get relevant experience for that type of job?
Do you know if any of those companies are hiring?
How can you research companies that may have jobs like that available?
What don't you like about the jobs you prefer to avoid?
Why is that your ideal work schedule?
Are you willing to deviate from your ideal work schedule?
Are there any hours that you absolutely could not work?

History Questions

Potential questions:
Did you like your last job?
What did you dislike about your last job?
Did you leave your last job on good terms?
Would your previous supervisor give you a good reference?
Did anything happen at your last position that you wouldn't want a future employer to find out about?
Why did you feel proud of that accomplishment?
Who can help you identify your strengths/weaknesses?
Why do you want to improve on those areas?
Who can help you improve those areas?
How can you tell if you have made progress?

Application Questions

Potential questions:
How can you become more comfortable submitting applications?
Do you usually get calls back after completing online applications?
If you could improve one thing on your applications, what would that be?
Do you have your resume with you?
Has anyone ever provided you with feedback on your resume or cover letter?
Do your references know your work history?
Do your references know you're using them as references?
Do your references have access to a phone/email to respond to employers?
Do your references know your strengths?
Do your references have a copy of your resume?

Interview Questions
Potential questions:
What do you think went well in your last job interview?
What's one thing you would like to improve with interviewing?
How do you practice your responses to interview questions?
What types of questions do you ask in an interview?
Have you ever Googled yourself?
Do you know how to change your privacy settings for your social media accounts?
What type of information do you think employers look for when searching social media?
What would you wear to an interview?
How do you usually get to interviews?
If you had an interview tomorrow, would you be ready? How can we get you ready?

Contact Questions
Potential questions:
How many minutes do you have on your phone every month?
Is the phone number yours alone, or do you share it with another person?
How often do you check your voicemail?
What does your voicemail message say?
What email address do you use on applications?
Do you have different personal and professional emails?
Why do you think a professional email address is important?
Do you get a lot of junk mail in your email box?
Where can you go to check your email?
How often do you check your email?

Ask How can the information you gather from follow-up questions like these help you work more effectively with participants?
Possible Answers:
- *Helps build rapport by being conversational, showing you're listening, etc.*
- *Helps identify potential concerns sooner rather than later*

Using Reflections and Cues

PPT 50

PG 17

Another way you can encourage participants to tell you more is by using reflections. Reflections offer the other person's content back to them in a non-threatening way. They invite the other person to continue talking or go further. They also help the person to organize their thoughts. Reflections show the other person that you're listening, and they're a great way to check for understanding.

There are four steps to constructing a reflection.

1. Hear what the person is saying.
2. Make an educated guess about the person's underlying meaning or feelings.
3. Choose your direction. Which part of what they said do you want to reflect back to them? What do you want to hear more about?
4. Share your guess as a concise statement, *not* a question.

Here's an example of what a reflection might sound like.

Participant: I really liked my last job. I think I was pretty good at it, too. I helped a lot of people.

Case Manager: "You're interested in finding a job in the same field." or "You enjoy helping people."

Listen to Reflect Activity

Purpose: Learners practice listening for understanding and reflecting.

Materials: Dry erase paddle and dry erase marker – one for each learner.

Estimated Length: 10 minutes

Directions to Trainer: This activity has two parts. In each part, trainers ask questions, learners write their responses on the dry erase paddle, and then learners hold up their paddle. Trainers read out loud some of the learner responses and reveal the correct answer. In part one learners guess the underlying feeling behind a statement. There may be many different correct answers for these questions. In part two learners choose the best feeling reflection. These questions have a best answer given the options provided.

Trainer Instructions to Learners:

Part 1: It's your turn to practice. Everyone should have a dry erase paddle and a dry erase marker. I'll show a statement on the screen. I want you to guess what this person might be feeling, write that word on your paddle, and hold your paddle up for me to see.

☼ PPT 51

Remember that training program we were talking about last time? Well, I can't do it. They said my test scores are too low.
Possible Responses: Depressed, Surprised, Disappointed, Upset

Note to Trainer: Allow a couple minutes for learners to write down and hold up their responses. Read a few responses out loud before moving on to the next question.

☼ PPT 52

My company had no right to lay me off with no notice. I was a good employee for ten years.
Possible Responses: Anger, Disbelief, Shock, Unfair

☼ PPT 53

I have been in this program for almost six months, and nobody has found me a job.
Possible Responses: Frustration, Confusion, Upset

☼ PPT 54

I liked my last job, but they fired me when my daughter got sick, and I didn't have anybody to watch her. What was I supposed to do? I couldn't take her to daycare with a fever.
Possible Responses: Frustration, Sadness, Overwhelmed

Part 2: Great job identifying some of those potential underlying feelings. Now let's take it a step further. I'll show you a statement with three potential responses. I want you to choose the response that offers the best reflecting feeling statement. Write the letter of the response you chose on your dry erase paddle and hold it up for us to see.

☼ PPT 55

Note to Trainer: Allow a couple minutes for learners to write down and hold up their responses. Comment on the answers that are coming in. Reveal the correct answer. If many learners choose an incorrect answer, provide the additional italicized information for that response before moving on to the next question.

The best response is C.

A. *This response does not communicate to the participant that her feelings were heard and understood. In addition, it is demeaning.*
B. *This response ignores the participant's feelings and jumps right to solving the problem.*
C. *This is the most effective response because it communicates that the listener understood the person's feelings. It does not show judgement, but simple acknowledgment.*

☼ PPT 56

The best response is B.

A. *This is a defensive response that pits the worker and person as opponents rather than partners working together toward the same goal.*
B. *This is the most effective response because it communicates the listener's understanding of the feelings the person expressed.*
C. *This response dismisses the person's feelings and jumps right to a perhaps oversimplified solution.*

☼ PPT 57

So far, we've discussed how using open-ended questions and reflections are helpful ways to ask follow-up questions and get the most out of our assessment conversations with participants. Our third tip is to listen for cues. When you notice a verbal or non-verbal cue, that may be a hint to you to ask a follow-up question. For example, a participant may hesitate before answering a question with a non-committal answer. This might clue you in that there's more to the story than what the participant is saying.

Try using open-ended questions and reflections to gently probe for more information. If the participant becomes extremely resistant to answering the question, it's okay to move on. Just be sure to come back to the question later after you have built up a rapport and trusting working relationship.

Formal Assessment Agreement

PPT 58

PG 18

Going beyond what's on the page to ask additional questions may bring up sensitive topics for participants. This is especially true when we need to request a formal assessment. To start the request process, a Case Manager must complete the W-2 Formal Assessment Agreement form with the participant.

According to W-2 Manual 5.5.1.2, "The FEP must use the W-2 Formal Assessment Agreement to help explain to the applicant or participant the purpose of the formal assessment and type of follow-up services and activities that may result from completing it."

W-2 Formal Assessment Agreement Scavenger Hunt

PPT 59

PG 18-20

Purpose: Learners explore the W-2 Formal Assessment Agreement form.

Materials: None

Estimated Length: 15 minutes

Directions to Trainer: Instruct learners to work in table groups to answer the questions in their Participant Guide, using the W-2 Formal Assessment Agreement. Debrief as a large group.

Trainer Instructions to Learners: Using the W-2 Formal Assessment Agreement form, work with the people at your table to answer the questions in your Participant Guide. Be prepared to share your answers. You have five minutes.

1. Who can complete a formal assessment?

   Answer: doctor, psychologist, counselor, vocational rehabilitation specialist, or other professional

2. True or False: You must complete a separate W-2 Formal Assessment Agreement form for each type of formal assessment needed.

   Answer: False – You may check multiple assessment types if they are applicable.

3. In what ways can a Formal Assessment help Case Managers and participants make decisions?

   Answer:
   - *Determine W-2 placement*
   - *Identify employment goals and the activities that help participants reach their goals*
   - *Ability to do training and education activities*
   - *Need for any special services or work site accommodations*

4. How can you explain what 'accommodation' means to a participant?

   Answer: Accommodations are changes that make it easier for you to do your W-2 activities.

5. Who pays for formal assessments?

   Answer: Your health insurance, the W-2 agency, DVR, or another program. Participants don't pay for formal assessments.

6. True or False: Formal assessment information is confidential.

   Answer: True – It is used only to help a participant while they are in the W-2 program. Formal Assessment information may be shared with another W-2 agency in the event the participant moves and applies for W-2 with a different agency.

7. Who is responsible for helping the W-2 participant complete a formal assessment?

   Answer: The W-2 Agency and Case Manager

8. True or False: If a participant refuses to complete a formal assessment, their case will close.

   Answer: False – A participant cannot be penalized, sanctioned, or found ineligible if they refuse a formal assessment.

9. What information do you use to make case management decisions when a participant declines a formal assessment?

   Answer: Any information available

You can use the form to help guide the conversation with the participant. Thoroughly going through the form with the participant may be the difference between a participant choosing to agree to a formal assessment or declining one. It's to your benefit, and the participant's, to familiarize yourself with this form and be prepared to answer any questions the participant may have regarding formal assessment.

W-2 Assessments Summary

☼ PPT 60

W-2 Assessments come in all shapes and sizes, and the practice of assessing is ongoing throughout the duration of the participant's involvement in the W-2 program. You must act on the information you gain from W-2 assessments, which inevitably affects how you and the participant map out the participant's goals and determine activity assignment. Going beyond the tools we have available by asking follow-up questions, offering reflections, and paying attention to cues, helps you determine those next steps.

Applying Assessment Principles to Employability Plan - Goals

☼ PPT 61

So far, we've covered the Principles of Assessment, the BEST Approach, and applying assessment principles to W-2 assessments.

Goal Types

Now let's take a moment to review these topics, along with Goal Types within the Employability Plan, by playing Wisconsin Says!

Wisconsin Says

☼ PPT 62

Purpose: Learners review Employability Plan Goal Types.

Estimated Length: 5 minutes

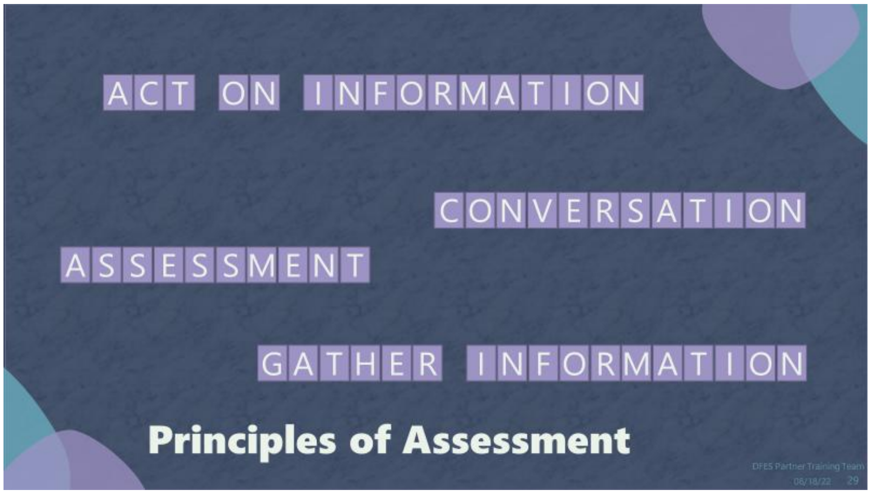
Materials: Buzzers (one for each table group)

Suggested Modification: If buzzers are not available, learners can raise their hand or use a different instrument (chimes, bell, etc.).

Directions to Trainer: Explain the instructions to learners and display the PPT. When learners correctly guess, click the answer in the PowerPoint to reveal it to the class. Rounds 1 and 2 review material covered earlier. Round 3 transitions to the next section. Each PPT slide is one round. **Click** on the blocks associated with the correct answer to display the words when learners give a correct answer.

Trainer Instructions to Learners: This is similar to America Says on the Game Show Network. There are several blank words on the screen. If you know one of the answers, press the buzzer at your table, then say your guess. When someone guesses a correct word, we'll reveal it on the screen.

The first set of words is related to the Principles of Assessment. We'll give you an example to get your started. The third word or phrase is Assessment.



Great job! The next set of words is related to the BEST Approach.

☼ PPT 63

Fantastic! Let's take a look at one more. All the words are goal types in WWP.

☼ PPT 64

Note to Trainer: After you reveal all the Goal Types, read through the definitions below. The Goal Types don't have to be revealed in a certain order.

PG 21

Fill in the goal types in your Participant Guide as we go over the definitions.

Primary employment: *These are short-term goals, which include the employment outcome the participant is striving for during their participation in W-2. The Primary Employment Goal should be the participant's main field of interest.*

Secondary employment: *These are short-term goals, which include the employment outcome the participant is striving for during their participation in W-2. The Secondary Employment Goal should be the participant's back-up field of interest.*

Long-term career: *These goals are part of the participant's long-term career plan. Keep in mind that the participant's employment goals and Other Program Goals should fit into this longer-term career plan.*

Other program: *These are concrete short-term goals or outcomes that the participant must achieve through program participation in order to move in the direction of their employment goals. This may involve completing education or training courses, acquiring work experience, or overcoming a barrier.*

Personal: *These goals are important to the participant, but are not required for W-2 participation. They are goals set by the participant that will strengthen the family and empower the participant to achieve their employment goals.*

☼ PPT 65

A participant's EP is their roadmap to success in the W-2 program. Let's look at the benefits of goal setting and how this plays a part in the developing their roadmap.

Goal Benefits Showcase

☼ PPT 66

Purpose: Learners present the benefits of their assigned Goal Type.

Estimated Length: 35 minutes

Materials: Laminated Goal Types, clothespins (to display laminated Goal Types), various props (examples: graduation cap, trophy, ribbon, toy car, doll, clock, play money, other dollar store items)

Directions to Trainer: Display the Goal Types and props on a separate table. Divide learners into five groups (one group for each goal type). After the groups are formed, tell learners to choose one person from their group to select their goal type from the display table. Walk around to each group as they are working on their presentation to ensure they are moving in the right direction. Provide feedback on the spot, and redirect if needed.

Trainer Instructions to Learners: Now you have an opportunity to be the teachers. You'll be working in groups. Each group will grab a Goal Type to present on. As a group, identify the benefits of setting that type of goal for both Case Managers and participants. The benefits don't need to be the same for both. You may use any of the items from our prop table or items on your table, such as markers and paper, to enhance your presentation. Let me give you an example. If I'm talking about how the Long-Term Career goal benefits the Case Manager, I might hold up this picture frame and say, "Knowing the participant's big picture helps frame other goals and goals steps."

Ask What questions do you have before you grab your goal type?

You have 10 minutes to create your goal benefits presentation.

<u>Report Out/Debrief:</u>
Possible Responses:
Primary Employment
Case Manager – helps assign activities that are meaningful, gives a specific focus for job search
Participant – better use of time to focus on the type of job they want, quality job search vs. quantity job search

Secondary Employment
Case Manager – helps broaden the scope of employment search depending on LMI
Participant – back up plan, bring money into household faster by broadening scope of job search efforts

Long-term Career
Case Manager – knowing their big picture helps figure out other goal types/steps
Participant – helps answer interview questions about long-term plans, provides direction for career planning, education or training needs, etc.

Other Program
Case Manager – helps identify and plan for activities, resources, and supports that helps participants move toward employment goals; may be useful in determining goal steps for employment goals
Participant – helps them move toward employment goals; be better prepared for employment activities

Personal
Case Manager – learn more about the participant to build rapport, answers the questions: What's important? What motivates them?
Participant – Working toward and achieving personal goals builds self-esteem

Ask What benefits did you hear that you've not thought about before?

Even though all the Goal Types have different benefits, there are many similarities, too. For Case Managers, goal setting provides clarity in decision making, narrows the focus on what's important, and defines the direction and the destination in which the participant is heading. In turn, goal setting benefits the participant by giving them the ability to control their future, provides motivation and a sense of personal satisfaction, and helps them find their purpose.

SMART Goals

PPT 67

PG 22

Goal setting with participants is fundamental in helping them to determine their own unique path. One of the best ways to increase the chances of successfully completing goals is to set them in a purposeful way. Do you remember the term SMART goals from New Worker Training? SMART is an acronym that stands for Specific, Measurable, Attainable, Relevant, and Time-bound.

PPT 68

In your Participant Guide, draw lines to match each piece of SMART goals to what it should include.

Note to Trainer: Give learners a couple minutes to individually complete the matching activity.

Let's go over the answers.

☼ PPT 69

The Specific piece of SMART Goals means making the goal clear and concise. Both you and the participant should understand the goal. Some questions to ask to help make a goal more specific are: "Who is involved?" "What do you want to accomplish?" and "Where does this take place?"

☼ PPT 70

In the Measurable piece of SMART goals, we're assisting in identifying what success looks like for the participant. Ask the participant, "What means can we use to determine when you've accomplished the goal?"

☼ PPT 71

When it comes to Attainable, we need to ensure the participant has the knowledge, skills, and aptitude to reach this goal. The goal is meant to inspire motivation. Ask the participant to think about how to accomplish the goal. Do they have all the tools they will need? If they currently don't have these tools, what would it take to attain them?

☼ PPT 72

For the Relevant piece of SMART goals, we want to make sure this goal matters to the participant. Is the result going to have a positive impact on the participant's life? Here are some questions to consider: Does this goal seem worthwhile? Is it the right time for this goal? Does this goal align with the participant's other goals?

☼ PPT 73

Finally, the Time-bound piece of goal setting means the participant needs to determine the length of time devoted to completing the goal. When do they believe they can complete this goal? What's a deadline that's long enough to be realistic, but short enough to provide a challenge?

☼ PPT 74

Not only does the SMART goal criteria help you craft goals on the Employability Plan, but you also can apply this to the goal steps. We'll practice using SMART goal criteria to break down large goals into smaller goal steps in just a bit.

Although we use the same process for setting goals with participants by applying the SMART goal criteria, each individual is unique, and participants may need to follow different paths to reach their destination.

☼ PPT 75

For example, two participants may have the same Long-Term Career goal, but getting there may look different for each person. They may not be starting at the same place, and that could mean that one person needs more goal steps along the way than the other.

Remember when we said that Case Managers are always assessing? This applies to goals, as well. We need to continually assess goal progress and re-evaluate whenever appropriate. There may be times when you see a lot of progress and forward momentum. During these times, you get to check off goal steps and celebrate the small victories with participants.

☼ PPT 76

However, sometimes you may see regression that causes participants to move backward. Regression is not failure; it's simply an opportunity to re-evaluate the goal and goal steps, and to make changes as needed. Like the image on the screen, many people plan for a linear path from where they are now to where they want to be, but life often throws twists and turns along the path that make the journey more interesting.

Breaking a Primary Employment Goal into Steps

☼ PPT 77

PG 23

One way to help participants navigate the path to their goal is to break it down into smaller, more manageable steps. Now, let's see an example of how to break a Primary Employment goal into goal steps, while meeting SMART goal criteria.

In this instance, the participant's Primary Employment goal indicates they are interested in obtaining a job as a cashier. The goal description indicates the participant has prior cashiering experience, enjoys customer service, is good with handling money, and demonstrates problem-solving skills. When breaking goals down into steps, it's important to factor in the participant's desired outcome, along with their experience and assessment results, all while applying elements of SMART goal setting.

According to W-2 Manual 5.1, "Certain types of assessments are required for all W-2 applicants and participants, including: Informal Assessment and Educational Needs Assessment." Additionally, per W-2 Manual 5.4, you must offer career assessments to all applicants and participants and schedule them within 30 days if they agree to the assessment.

Keeping this in mind, it makes sense that an Educational Needs Assessment and a Career Assessment may be part of goal setting. If you're including one of these assessments as a goal step, be sure the participant understands how it helps them work toward their goal. For this participant's goal, the goal steps include completing the TABE within the next two weeks and completing the Career Locker Assessment prior to their next appointment.

In our conversation with this participant, she mentioned that she'd need to figure out how to adjust the family schedule if she goes back to work. Together, we decide the participant would benefit from taking a Time Management workshop to brush up on some of her soft-skills and prepare her for re-entering the workforce.

We discuss with the participant the importance of quality employment searching and taking the time to look for a job that will be a good fit. The labor market for cashiers in the local area is very good, and we agree that it's feasible for the participant to identify 10 prospective employers that are hiring cashiers within the next month.

We also talk with the participant about meeting with a Job Developer to work on her resume and cover letter because she has not created these in the past. As we're talking about what the participant can expect regarding that appointment, we agree that it

would be beneficial for the participant to complete the Personal Data Record found on the DWD website prior to the appointment.
When completing the **Job Readiness** page in WWP, the participant indicated she doesn't know who she would use as a professional reference. We decide that would be a good goal step for her to work on prior to her next appointment with the Job Developer.

Finally, when we completed her informal assessment, the participant stated she had some legal trouble in the past. We offered her some resources on employment searching as a justice-involved individual, including information on letters of explanation and fidelity bonding. Reviewing this information was added as a goal step for her to work on during the next month.

As you can see, we were able to develop eight goal steps for this goal.

Ask How was SMART goal criteria woven throughout the goal steps? Let's start with S. In what ways are they specific?

Note to Trainer: Ask this question for each letter.

Possible answers:

- *Specific – They include details. For example, it does not just say 'meet with job developer,' but 'meet with job developer to develop resume and cover letter.'*
- *Measurable – We give the number of employers and references.*
- *Attainable – The participant has the knowledge, skills, and abilities to achieve these goal steps. We provided her resources to complete the goal (e.g., resources on writing a letter of explanation).*
- *Relevant – We used assessment results and conversation with the participant to create goal steps that are important to her.*
- *Time-bound – Most goal steps have a stated time frame for completion.*

Ask What did you see in here that likely came as the result of an assessment?

Ask How could some of these goal steps influence the development of other goals?
Possible answers: In an informational interview, the participant may realize they need more education or training for this job, and this could lead to the development of an Other Program Goal. Career Assessment results could indicate other fields of interest that may change the Primary Employment Goal or Secondary Employment Goal.

When you're crafting a goal description with a participant, you'll find that the more details you include, the easier it will be to identify the goal steps the participant needs to achieve the goal.

Practice - Breaking Goals into Steps

☼ PPT 78

Purpose: Learners break down a goal into manageable, achievable steps using SMART goal criteria.

Estimated Length: 25 minutes

Materials: Printed goal descriptions, white cardstock (cut into strips, 20 strips per group), colored markers (one color per group), painter's tape

Directions to Trainer: Instruct learners to return to the groups they worked with previously for the Benefits of Goal Setting activity. Provide each group with one printed goal description, up to 15 strips of white cardstock, and a colored marker (a different color for each group). Allow ten minutes for groups to break their assigned goal description into goal steps.

Allow 15 minutes for groups to rotate through the room, telling them to rotate every three minutes. Then, debrief as a large group.

Trainer Instructions to Learners: Return to the group you worked with for the Goal Types activity. We are giving each group a Goal Description. Work together as a group to break your goal into goal steps. Write each goal step on a strip of cardstock, one goal step per strip. Remember to use SMART goal criteria. Use painter's tape to display your group's goal and goal steps on the wall.

As a group, rotate around the room, stopping at each goal type. Bring your marker and extra strips of paper with you. Review the goal and the goal steps. Using your group's colored marker, add any additional goal steps you can think of that would apply to the goal. Remember, record only one goal step per strip, then add the goal step to the wall. Repeat this for each goal type, until you land back at your original goal.

Review the additional goal steps for your original goal.

Debrief Questions:

What did you notice as you read all the different goal steps?

How did your group approach breaking down your chosen goal into goal steps?

What was your group's process to ensure you applied SMART goal criteria to your goal steps?

Day 1 Wrap-Up

☼ PPT 79

To finish out our day, I'd like everyone to stand up at their tables. Each person needs to share one thing that stood out to them today and one thing they are looking forward to tomorrow. After everyone has shared both, your table can sit back down. Let's see what table sits back down the fastest. Start now!

Day 2 Introduction

☼ PPT 80

Colleague Q&A

☼ PPT 81

PG 24

Purpose: Learners review information covered during class, and network with each other to answer any remaining questions.

Materials: None

Estimated Length: 20 minutes

Directions to Trainer: Give learners three minutes to come up with their questions. Give groups ten minutes to discuss each other's questions.

Trainer Instructions to Learners: Take a few moments to think about everything we discussed yesterday. Then, jot down three questions or observations in your Participant Guide.

Next, find a partner or two, and take turns asking each other your questions or sharing your observations. If no one in your group is sure of an answer to a question, set that question aside. You will have the opportunity to ask us any questions your group could not answer. You have ten minutes.

Ask What questions do you have remaining?
Questions will vary. If there are no questions, have each group report out one question and answer, or observation from their discussion.

Yesterday, we introduced you to the Principles of Assessment and the BEST approach. We applied those concepts to W-2 specific assessments and started talking about goals. Today, we'll continue with goals, specifically using the BEST approach in those conversations. We'll round out the day by talking about activities, accommodations, and continuing to make connections.

Applying Assessment Principles to Employability Plan – Goals (continued)

PPT 82

Using the BEST Approach with Goals

We spent a lot of time talking about goals yesterday afternoon. We reviewed goal types, the benefits of goal setting and SMART goals, and practiced breaking a large goal down into smaller steps. But, where does the BEST approach fit into all of this?
Just like with assessment, we also can use the BEST approach to guide our conversation with participants when discussing goals.

Applying BEST to Goals Activity

PG 25

Purpose: Learners discover how Balance, Exploration, Sensitivity, and Trust can be incorporated into goal setting conversations with participants.

Estimated Length: 15 minutes

Materials: Flip chart markers and four pieces of prepared flipchart paper, one with each title: Balance, Exploration, Sensitivity, and Trust, hung on a wall in the room.

Directions to Trainer: Divide learners into four groups. Give learners 6 minutes to choose their topic and complete their list. After groups are finished, have them report out to the class. Instruct learners to take notes in their Participant Guide as groups report out.

Suggested Modification: Add an example on the flip chart paper to help each group get started.

Trainer Instructions to Learners: We want to hear your ideas on how you can use the BEST approach while goal setting with participants. We have hung four flipchart papers on the wall, titled Balance, Exploration, Sensitivity, and Trust. When I say begin, a person from your group will select one of the papers and bring it back to your table. Work together to come up with examples of how you can use that component of BEST when discussing and creating goals with participants. For example, if my group chose Exploration, one thing we might write down is that we could explore Labor Market Information with participants to help them craft goals that match the job market availability in our area.

Ask What can I clarify before we begin?

Go ahead and select your topic.

Report Out/Debrief:
Possible answers:

Balance:
- *Encourage participants to choose goals that are important to them; they don't have to be related to W-2 program goals.*
- *Back and forth conversation:*
  Worker speaks – explains goal types
  Participant speaks – talks about their goals
  Worker speaks – asks follow-up and clarifying questions
  Participant speaks – provides more explanation regarding their goals

Exploration:
- *Use assessment results to help provide a starting point, focus, or narrow down goals (especially when participants are unsure of their goals).*
- *Explore labor market information to help participants craft goals.*

Sensitivity:
- *Assist participants in applying the SMART criteria to their goals.*
- *Respectfully challenge learners when appropriate:*
  Is this goal realistic given the participant's resources and the local labor market?
  Is the timeframe short enough to motivate the participant, yet long enough to be achievable?

Trust:
- *Clearly explain what the participant's role is in achieving their goals (complete the goal steps), and what your role is (provide resources/supportive services).*
- *Check off and celebrate completed goal steps to help participants build confidence and trust in their own abilities.*

☼ PPT 83

You've identified many great ways to incorporate the BEST approach into goal setting conversations with participants. Another important item to remember is the need to ask follow-up questions. Asking follow-up questions can help you and the participant narrow down goals and find out the driving 'why' or motivation behind each goal.
Some examples of follow-up questions you may want to ask during goal setting conversations are:

What about that job that most appeals to you?

Why is this a Secondary Employment goal for you, and not a Primary Employment goal?

What resources do you need to accomplish this goal?

What do you need to complete before you can achieve this goal?

How would you like your life to be different?

PPT 84

PG 26

We're going to watch a video that shows an example of a goal setting conversation between a W-2 worker and a participant. As you listen, answer the first question in your Participant Guide by writing down examples of how the Case Manager uses the BEST approach.

Click to play the video.

Now, spend the next six minutes answering the remaining questions on this page of your Participant Guide with your table group.

Note to Trainer: There will be no large group report out for these debrief questions. Walk around the room while the groups are answering the questions, and listen to their conversations. If you hear anything concerning or anything that's a very good point, use your discretion to determine if it needs to be discussed as a large group.

Goals Summary

PPT 85

After examining assessment and goals, you probably can see that these topics are inter-related. One example of this inter-connectedness is that you can use assessment information as a starting point for goal setting. This is especially helpful in situations where participants are unsure of their goals.

When you begin asking a participant about their goals and you receive a response of, 'I don't know,' a blank stare, or 'I just want a job,' it can be helpful to refer to assessment results to start the conversation. And there isn't just one type of assessment that's helpful in this; you can use the findings from many different types of assessments to start the conversation.

Speaking of assessment results, what happens if you're having a goal setting conversation with a participant, and you realize that their stated goals don't match the assessment results?

Ask Has anyone experienced this? If so, how did you handle it?

This is a great opportunity to apply the Sensitivity piece of the BEST approach. You need to acknowledge the discrepancy, while respecting the participant's autonomy to choose their own goals. Point out that the goal doesn't seem to be a great fit with the assessment results, and ask what about that goal or job appeals to the participant. By asking probing questions, you can work with the participant to come up with goals that align with the assessment results. Keep in mind, this may not happen in one appointment. It's okay for the goals to be a work in progress that you and the participant are continually refining each time you meet.

Another way that goals and assessment are inter-related is that we must factor a participant's goals into needed assessments. Goals could determine the need for further assessment. For example, during the goal setting conversation, a participant may mention a barrier they need to overcome, an educational need, or specialized skills they want to achieve. Additionally, needed assessments may become goal steps, as well as outcomes or findings in completed assessments.

Just as goals and assessment are inter-related, activity assignment also is connected to these factors.

Applying Assessment Principles to Employability Plans – Activities

PG 27

Let's refresh what we learned about Employability Plan activities in New Worker Training with a fill-in-the-blank race. When I say begin, work independently to fill in the blanks in your Participant Guide with the words from the word bank. If you're the first person to finish, hold your Participant Guide up in the air, and then we'll go over the answers together.

Note to Trainer: Instruct learners to begin. After the first learner holds up their PG, go through the correct answers.

PPT 86

Activities help participants achieve their *goals*.

Goals direct the *activities*.

Activity development is a *collaborative* process between you and the participant.

Take into consideration the participant's personal strengths and barriers identified through *assessment*.

The *participant* has buy-in when they have a role in identifying activities.

Activities are categorized under specific activity *codes*.

The Activity Code *Appendix* of the W-2 Manual lists all the activity codes, definitions, and examples.

Activity Codes

PPT 87

PG 27 (bottom)

A key component of determining activity assignment with participants is knowing how to code the activities correctly. W-2 has a lot of codes to choose from, and you can find definitions of each code in the W-2 Manual Appendix.

You may have noticed that a lot of the codes are similar in nature. The details you include in the other sections of the **Activity** page of the EP help you choose the correct code based on the code definitions.

The first group of codes you see in the W-2 Manual Appendix is the assessment-related codes. Use these codes when participants have a scheduled appointment to complete a formal assessment for themselves or another family member. Assessment may be related to AODA, learning disability, medical, mental health, or domestic violence issues.

There are two important things to keep in mind when using these activity codes. First, you identified a potential barrier and documented this on either the **Participant Barriers** page or the **Family Barriers** page in WWP. For a participant barrier, you also created a barrier page, and indicated that you referred the participant for an assessment. Second, participants with an open assessment activity cannot be sanctioned, per W-2 policy.

Next, we'll spend some time talking about commonly used activity codes and how to determine which one to use when.

Analyzing Activities

PPT 88

PG 28

Purpose: Learners identify similarities and differences for commonly used and confused activity codes when matching codes with activity descriptions.

Materials: Four copies of the W-2 Manual Appendix – Activity Codes (in page protectors and clipped together), Four sets of Round 1 and Round 2 Activity Codes and Description cards (printed and laminated)

Estimated Length: 60 minutes

Directions to Trainer: Divide learners into four groups and provide them with a copy of the W-2 Manual Appendix – Activity Codes.

Round 1: One at a time, ask each group to pick a gift displayed on the screen. As the teams pick their gift, **click** the chosen gift to reveal a set of three activity codes assigned to that group. Groups will identify at least one key similarity and one key difference among their assigned codes, using the W-2 Manual Appendix. Allow a total of 10 minutes.

After 10 minutes, pick a group to report, and encourage learners to complete the corresponding charts in their guide. After all groups report out, provide each group with a set of cards, containing sample activity descriptions and activity codes for the 12 codes we just went over. Next, instruct learners to match which activity description best matches the activity code. Give them 6 minutes to do this. Go through the correct answers, then ask the debrief question.

Round 2: Repeat the same process as in Round 1, with a new set of codes.

Trainer Instructions to Learners (Round 1): In a moment, we'll ask someone from each group to select a gift on the screen, revealing a set of three activity codes. With your group, use the Activity Codes section of the W-2 Manual Appendix to review the definitions for each of your assigned codes. Identify one key similarity and one key difference for your set of codes and note this in the chart in your Participant Guide. You don't need to think of an example activity for each code just yet, as we'll come back to this later. The person who has worked in W-2 the longest will be the scribe and spokesperson for your group.

☼ PPT 89

Let's determine the codes for your group. When I call on your group, select one of the gifts on the screen, and we'll reveal your set of activity codes. Be sure to note which set of codes your group revealed.

Note to Trainer: Repeat until all teams have their codes. Keep track of which codes each group is assigned.

Now that you have your codes, work with your group to locate your codes and identify one similarity and one difference for the codes. What can I clarify before we get started?

☼ PPT 90

It's time to hear your key similarity and difference for each set of codes, starting with:
BE/GE/HE
Possible Responses:
- *Similarities: Classes that focus on education fundamentals for the purposes of increasing knowledge or gaining a secondary education credential. They all allow for one hour of unsupervised study time for each hour of class time.*
- *Differences: BE focuses on increasing academic functioning needed for employment. BE does not result in a certificate or diploma. GE prepares individuals for the GED test, which does not include all high school credits. HE prepares individuals for HSED tests, which involves more tests than the GED. An HSED is the same as having a high school diploma.*

☼ PPT 91

Let's move on to the group assigned the CA, CM, and FC codes. Share your key similarity and difference with us.

CA/CM/FC
Possible Responses:
- *Similarities: Professional counseling/treatment that a participant attends.*
- *Differences: CA is for AODA-specific counseling directly for the participant. CM is for mental health counseling directly for the participant. FC is for a family member's counseling that the participant must attend.*

☼ PPT 92

Next, we'll hear from the group that has the codes ES, JS, and WE.

ES/JS/WE
Possible Responses:
- *Similarities: All activities could be targeted to a specific field of interest. Career assessment helps define these activities. Help participants become good job candidates.*
- *Differences: ES is used when seeking employment independently or with the help of agency staff. JS is learning new skills in a specific field that results in a certification. WE is preparing for employment by practicing soft and technical skills through a worksite.*

☼ PPT 93

And now, let's hear from our final group, which has LF, PA, and PD.

LF/PA/PD

Possible Responses:

- *Similarities: All codes may be used for certain support groups. Focus on participant's personal growth in areas such as budgeting, nutrition, and parenting.*
- *Differences: LF focuses on life skills activities in a structured setting to help participants succeed in the workforce. PA and PD don't need a structured setting and aren't necessarily tied to succeeding in the workforce. PA focuses on learning effective parenting skills. PD focuses on healthy lifestyle activities.*

☼ PPT 94

Let's take what we just learned from all these codes and apply it to examples of activity descriptions. Each group has an envelope that contains activity codes and examples of activity descriptions. Work together to match the activity descriptions to the appropriate activity code. You can use any of the materials you have available as a reference.

As I go through the answers, check your work, and make any needed corrections.

BE

Answer: Complete classes and study time to increase math skills in preparation for tech school placement exam.

HE

Answer: Complete classes and study time to prepare for high school equivalency exams.

GE

Answer: Complete classes and study time to prepare for a general education certificate.

WE

Answer: Gain data entry skills by participating in work training at a local business.

JS

Answer: Gain data entry skills by completing the training certification program.

ES

Answer: Connect with local employers in the data entry field to learn about and apply for job openings.

FC

Answer: Attend joint counseling sessions with your daughter.

CA
Answer: Attend counseling appointments for continued addiction recovery.

CM
Answer: Attend counseling appointments to work on coping strategies for general life challenges.

PA
Answer: Use the tools on myplate.gov to complete a weekly meal plan that focuses on nutritious dinners for the whole family.

PD
Answer: Use the tools on myplate.gov to create a personalized food plan to help you lose weight.

LF
Answer: Attend the Establishing Healthy Eating Routines by Using MyPlate workshop.

Ask What key words in the activity descriptions helped you to determine which code fit best?

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

A few words can make a difference when selecting the correct activity code. It's important to write activity descriptions for the participants to ensure they know their exact assignments. Don't just say "take classes" or "attend counseling." Adding more details to the descriptions also helps you determine which activity code to use and assists agency or state staff when monitoring your cases.

☼ PPT 95

PG 29

Trainer Instructions to Learners (Round 2): You may have noticed another chart on the following page of your Participant Guide. That's because we have four more gifts with new sets of codes. Like before, you'll work with your group to find a key similarity and a key difference for your set of codes. The person who has worked in W-2 the least amount of time will be the scribe and spokesperson this time around.

When I call on your group, select one of the gifts on the screen, and we'll reveal your set of activity codes. Be sure to note which set of codes your group revealed.

Note to Trainer: Repeat until all teams have their codes. Keep track of which codes each group has.

Now that you have your codes, identify a key similarity and difference among your group's codes.

☼ PPT 96

JS/TC/TT

Possible Responses:

- *Similarities: Education based, resulting in a certificate, diploma, or degree. Tied to a specific occupation. Allows participants to gain skills needed for employment. Must consider study time.*
- *Differences: Job Skills Training is short-term (40-516 hours in length), and the W-2 agency is involved in arranging the training with the participant. Technical College is for participants enrolled full-time in a program through a WI Tech College that takes 1-2 years to complete. Additionally, the participant must be employed or assigned to 25 hours of work activities each per week. Tech College Study time can be assigned only if TC also is assigned and is included in the 25 hours of work activities per week.*

☼ PPT 97

MP/PD/PR

Possible Responses:

- *Similarities: Participant is working to improve their quality of life. Could be completed individually or by working with a support person, group, or provider.*
- *Differences: Ongoing Medical/Personal Care is used for participants with ongoing medical appointments or who are facing medical or mental health barriers that will last longer than six months, certified by a licensed provider. Personal Development are activities that a participant wants to complete to promote a healthier lifestyle. Physical Rehabilitation must be determined to be medically necessary, anticipated to last six months or less, and aid the individual in returning to work.*

☼ PPT 98

CE/JR/MO

Possible Responses:

- *Similarities: These codes are designed to help participants develop skills to assist them in successfully preparing for and maintaining employment.*
- *Differences: Career Planning and Counseling activities are related to career assessments and guidance in career planning. Job Retention Services are provided to participants who are working to help them maintain their unsubsidized employment. Job Readiness/Motivation focuses on engaging participants in activities centered around preparing participants for work.*

☼ PPT 99

CC/DR/HR

Possible Responses:

- *Similarities: Participants engaged in these activities are working toward overcoming a barrier to employment.*
- *Differences: Child Care Related Activities focus on participants obtaining childcare. Participants engaging in Drivers Education activities are enrolled in a course that includes classroom and behind-the-wheel instruction, with the intent to obtain their driver's license. Housing-Related Activities are for participants who are facing housing issues and need to stabilize their living situation.*

☼ PPT 100

Just like the last round, let's take we just learned from all these codes and apply it to examples of activity descriptions. Each group has another envelope that contains activity codes and examples of activity descriptions from Round 2. Work together to match the activity descriptions to the appropriate activity code. Remember, you can use any of the materials you have available as a reference.

As I go through the answers, check your work, and make any needed corrections.

TC

Answer: Attend administrative professional classes at the local technical college.

TT

Answer: Complete study time for assigned classes.

JS

Answer: Attend CNA classes at the local technical college.

PD
Answer: Go to the YMCA three times a week to partake in fitness classes of your choosing.

MP
Answer: Attend monthly appointments with doctor to manage chronic pain.

PR
Answer: Complete aquatic therapy at the YMCA two times per week with physical therapist.

CE
Answer: Meet with the HR Director at Kohler to complete an informational interview.

MO
Answer: Attend weekly appointment with Job Developer to create resume and develop interview skills.

JR
Answer: Touch base with W-2 Case Manager on Wednesdays at 4pm to discuss employment.

CC
Answer: Use YoungStar to research childcare facilities near your home.

DR
Answer: Complete online driver's education class through justdrivewi.com.

HR
Answer: Apply for housing assistance to help get a place of your own.

Ask What key words in the activity descriptions helped you to determine which code fit best?

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

Thanks to all groups for sharing. Before we move on to how activities, goals, and assessment information tie together, ask us at least two questions about activity codes.

Tying Activities to Goals and Assessment Information

☼ PPT 101

PG 30

Just like information you gathered from W-2 assessments influences your goal setting conversations with participants, those conversations could uncover the need for further assessment. You continue to use both the assessment and goal information to influence your activity assignment conversation. It's important to show you're connecting the dots between all this information by creating an activity plan with the participant that meets them where they are at and helps them reach their goals.

Chances are, you have some ideas of activities to assign before getting to activity assignment with the participant. As you meet with them to complete assessments and discuss goals, you're picking up on cues that help inform which activities a participant may need or benefit from.

Let's think about what some of those cues might be. When it comes to the W-2 assessments, you may have learned the participant meets with a counselor regularly, has no experience completing online applications, or needs to increase their reading skills for the type of job they want. This may lead to activities such as attending counseling appointments, meeting with a Job Developer, and/or taking a basic education class. Additionally, if the participant is seeing the counselor due to a barrier, there may be restrictions or accommodations for you to consider when creating the activity plan.

When it comes to goals, you might find cues in the goal name, goal description, and goal steps. If a participant wants to attend classes at a technical college, you could assign them activities aimed at researching program requirements and costs, and eventually an activity to attend classes. If the participant indicated they want to work on a family budget as part of a personal goal, they could attend a workshop or review online resources.

The bottom line is, even as you're making these connections while working with the participant, remember it's important to plan the activities with them.

☼ PPT 102

Soon we'll identify ways to incorporate the BEST approach into activity assignment conversations. But first, remember the importance of asking follow-up questions. Follow-up questions are a great way to monitor participation, note progress, and look for patterns.

For instance, if a participant is regularly participating in an activity, then suddenly stops, you could use follow-up questions to dig deeper into the reason why. You may discover a need to make changes in their activities or goals, or a need for further assessment. Some examples of follow-up questions you may want to ask during activity assignment conversations are:

Tell me about what your average day looks like.

- How do you approach your job search?
- What other skills would you like to learn?
- How will this activity help you to achieve your goal?
- What has gone well with this activity and what do you find challenging about it?

Using the BEST Approach with Activities

Think about how this applies to having the conversation with participants. How do you work together to select activities that will help the participant meet their goals? How do you sell the benefits of activities so that participants are likely to complete their assigned activities? How do you ensure participants understand what they're supposed to do?

Luckily, using the BEST approach when having the activity assignment conversation can help address these questions.

Using BEST with Activities Networking

PPT 103

PG 31

Purpose: Learners identify examples of how to incorporate Balance, Exploration, Sensitivity, and Trust into activity assignment conversations with W-2 participants.

Materials: Music

Estimated Length: 20 minutes

Directions to Trainer: For 5 minutes, allow learners to independently brainstorm examples of how to use the BEST approach with activity assignment conversations. Then, play music for about 4-6 minutes while learners walk around the room and share examples with each other to fill their charts. Stop the music when most learners have completed their charts.

Trainer Instructions to Learners: In a moment, you will work independently to fill out the chart in your Participant Guide with your examples or ideas on how to do this. But first, we'll go over one example for each category to get you started. Feel free to write these in your chart.

PPT 104

For Balance, one example is to ask open-ended questions to get more input from the participant. Think about starting the conversation by asking their thoughts on activities that could help reach the goals they set.

☼ PPT 105

An example for Exploration is to take your time. It's hard to work together to create individualized activities when you're in a hurry.

☼ PPT 106

One example for Sensitivity is to focus on the goals. Ensure each activity will help the participant reach their goals and help make this connection. Participants are much more likely to be excited about their activities if they can see that it's not just busy-work, but an activity that helps them get to where they want to be.

☼ PPT 107

Finally, an example for Trust is to build a collaborative partnership where you and the participant are working together when making activity assignment decisions.

Now, you'll have 5 minutes to work on your own to fill out the chart with your ideas for how to use BEST during an activity assignment conversation. If you're unable to complete the entire chart, that's okay. In fact, we recommend that you leave the last row blank for what's coming next.

Part 2: In a moment, we'll play some music. When the music starts, pick up your Participant Guide and a writing utensil, and walk around the room to find another person. Ask the person to share one example to help you fill in any blank squares in your chart. If your chart is already full, share one example with the other person to help them fill any blank spaces in their chart. Continue this process with a new person and repeat until the music stops. When the music stops, return to your seat.

PG 32

Great job networking with each other to come up with some new ideas! Here are some examples we have for you. Feel free to jot any of these ideas that are new to you in your Participant Guide.

☼ PPT 108

Balance:
Ask the participant what they're already doing. This is a great starting point to see if anything that they already do can be included as an assigned activity for W-2.

Take turns talking. Ask questions, and use reflections to encourage the participant to talk.

Provide options and examples of activities, and ask the participant which ones they are interested in.

Continue the conversation by assuring the participant that you will check in to see how the activities are going.

PPT 109

Exploration:
Be creative. Think outside of the box. Don't default to the same activities, just because that's what you're familiar with.

Trial and error is okay. Let the participant know that you can update the activities at any time. If something isn't working, you can change it.

Network with other W-2 workers for new activity ideas.

Keep assessing. Participants' needs, circumstances, abilities, and interests may change throughout their time in the program.

PPT 110

Sensitivity:
Always take assessment results into consideration when developing activities. Consider the participant's individual barriers, strengths, interests, and skills.

Be empathetic and empowering. Address participants' needs, and respect their autonomy.

Incorporate accommodations as needed. Work with participants to find out what they need to succeed.

Encourage participants to try something new, as they're able. Use affirmations and be strength-based to help build confidence.

PPT 111

Trust:
Let the participant know that the activities on the Employability Plan are for them, not for you.

Take the time to ensure the participant understands what they are supposed to do, and when they are supposed to do it. Go over what they will gain from completing activities, and the potential outcome for not completing activities.

Make sure the participant knows all their options. Discuss the good cause policy and the ability to make up hours, and thoroughly answer any questions.

Keep the lines of communication open. Create a welcoming environment so that the participant feels comfortable to come to you with any issues, concerns, or additional questions.

PPT 112

Ask Who has additional examples or ideas on your sheet we haven't already mentioned that you would like to share?

PPT 113

PG 33

Now, we're going to watch a video that demonstrates an example of a conversation between a W-2 worker and a participant discussing activities. As you listen, answer the first question in your Participant Guide by writing down examples of how the Case Manager uses the BEST approach.

Click to play the video.

Now, spend the next six minutes answering the remaining questions on this page of your Participant Guide with your table group.

Note to Trainer: There will be no large group report out for these debrief questions. Walk around the room while the groups are answering the questions and listen to their conversations. If you hear anything concerning or anything that's a very good point, use your discretion to determine if it needs to be discussed as a large group.

Activities Summary

PPT 114

As you can see from the conversation we just witnessed, EP activities are tied closely to both assessment and goals. We use assessment results and goals to provide a good starting point for coming up with potential activities.

Assessment and goals are connected to activity assignment, not only while creating the initial EP, but also throughout the participant's entire participation in the W-2 program. Monitor participants' participation in activities to evaluate their progress toward goals, and to help determine the potential need for re-assessment or goal adjustments.

Applying Assessment Principles to Accommodations

As you reevaluate the participant's progress, you need to ensure the participant has everything they need to be successful. You may find that a participant is unable to complete an activity. However, a slight modification to the activity could make a big difference. This is where accommodations come in.

☼ PPT 115

PG 34

Accommodations are designed to give everyone an equal chance to do their best work. For the W-2 program, that means a chance to successfully engage in W-2 activities and make the transition to unsubsidized employment.

Myth or Fact Activity

☼ PPT 116

Purpose: Learners examine commonly held beliefs about W-2 accommodations and determine which are myths and which are facts.

Materials: Dry erase paddles and dry erase markers – one for each learner.

Estimated Length: 15 minutes

Suggested Modification: Instead of using dry erase paddles and dry erase markers, tape a sign with the word 'Myth' on one wall, and a sign with the word 'Fact' on the opposite wall. Instruct learners to point to the correct sign for each statement.

Directions to Trainer: Read each statement and allow learners time to choose their answer. After most of the class holds up their paddles, reveal the answer and discuss the additional information for each statement.

Trainer Instructions to Learners: Let's start with some myths and facts about accommodations in the W-2 program. You each have a dry erase marker and paddle. Write 'myth' on one side, and 'fact' on the other. I'll pull up a statement. Determine if you think the statement is a myth or a fact and hold up the paddle accordingly.

☼ PPT 117

Statement 1: Accommodations/Formal Assessment
W-2 Agencies must provide accommodations to participants only if a professional identifies accommodations in a formal assessment.

Myth: Although you can refer an individual for a formal assessment to gather more information, they may need an accommodation in the meantime as part of the application process or initial activity assignment. Per W-2 Manual 1.3.1, if an applicant or participant discloses a disability, you must offer reasonable accommodations. It's not okay to wait for a completed formal assessment before you offer accommodations.

Note to Trainer: If asked, workers can leave the 'An assessment completed by…' line of the Services and Accommodations form blank when providing accommodations prior to receiving a formal assessment.

☼ PPT 118

Statement 2: Handicap Accessibility
As long as your W-2 Agency is handicap accessible, you don't need to worry about accommodations.

Myth: W-2 Agencies must follow the guidelines set forth by the Americans with Disabilities Act. The definition of a disability covers much more than limitations of a physical nature such as walking, seeing, and hearing. It also includes mental conditions such as depression, anxiety, and phobia; as well as learning disabilities such as reading and writing deficits. Additionally, you must consider safety planning accommodations for victims of domestic abuse.

☼ PPT 119

Statement 3: Identifying Accommodations
The W-2 agency is responsible for identifying the accommodation the participant needs.

Fact: Per W-2 Manual 1.3.1.2, the W-2 agency is responsible for identifying the need for the accommodation, identifying the accommodation itself, and making sure that you provide the accommodation.

Ask What are some ways to identify the type of accommodation a participant may need?
Possible answers:
- *Asking the participant.*
- *Information from other professionals or on a formal assessment.*
- *Using the Job Accommodation Network (JAN).*

☼ PPT 120

Statement 4: Providing Accommodations

Providing accommodations usually involves making extreme modifications to processes or purchasing expensive equipment.

Myth: Reasonable accommodations ensure the applicants and participants with disabilities have an equal opportunity to participate in the W-2 program. Often, accommodations don't involve any cost, such as reading materials aloud for someone with a learning disability, allowing someone to take more frequent breaks to manage diabetes, and so on.

PPT 121

Statement 5: Modifying EPs

When a formal assessment identifies accommodations the participant needs, you must modify the participant's EP to include the services and accommodations.

Fact: According to W-2 Manual 5.5.1.2 and 6.1.2, you must include recommendations in the formal assessment to help a participant succeed in a work setting into the participant's EP. This also includes providing the participant with a written description of any services, activities, and reasonable modifications or accommodations they need on the Services and Accommodations to Help You Do Your W-2 Activities form. We'll talk more about this form shortly.

PPT 122

Ask Looking back at the myths and facts we just covered, which one surprised you?

Gathering Accommodation Information (JAN)

PPT 123

PG 35

You may find you need help in identifying accommodation options as you continue your conversations with participants. One helpful resource you can use to gather information on appropriate accommodations is the Job Accommodation Network, or JAN. Their website, askjan.org, has information on the Americans with Disabilities Act (ADA), disabilities, and accommodation ideas for those disabilities.

You also can contact JAN via phone, e-mail, or webchat for more help in strategizing accommodations for W-2 participants.

Race to Accommodate

Purpose: Learners use AskJan.org to identify possible accommodations for a disability.

Materials: https://askjan.org/

Estimated Length: 10 minutes

Directions to Trainer: Instruct learners to navigate to AskJan on their phone (if they are unable to do so, have them work in pairs or small groups). As learners shout out accommodations, type their responses in the corresponding box on the PPT.

Trainer Instructions to Learners: AskJan's A to Z Lists are helpful for both you and participants when you identify they have a need for an accommodation, and you're unsure what type of accommodation to provide. Let's use this feature. Use your phone to go to the AskJan website at https://askjan.org/. When I name a disability, use the A to Z Lists to find a potential accommodation for that disability. When you have found an accommodation, shout it out.

PPT 124

The first disability to search for is anxiety.
Possible responses: apps for concentration/memory/stress, fidget devices, written instructions, planners, on-site mentoring, checklists, color coded system, modified break schedule

Next, let's look at migraines.
Possible responses: air purifier, modified lighting, anti-glare filters, modified workspace

Lastly, let's explore possible accommodations for fibromyalgia.
Possible responses: anti-fatigue matting, periodic rest breaks, task separation, ergonomic equipment

After you and the participant identify accommodations, you must document those accommodations on the **Participant Barrier** page in WWP and on the Services and Accommodations to Help You Do Your W-2 Activities form.

Accommodation Descriptions

PPT 125

You've started acting on the information about a participant's potential barrier by working with them to identify appropriate accommodations. Your next step is to document this information in a way that shows how you're putting everything into action. Again, there are tools to help us do this.

☼ PPT 126

The **Participant Barrier** page in WWP contains an **Accommodations** section. Remember, you access this page from inside the informal assessment or through the apps area.

Start by selecting what the accommodation is for from the dropdown. Notice this list contains several potential limitations a participant may experience due to a disability. **Note to Trainer**: Pause long enough for learners to skim through the list.

Then, add information in the **Details** field describing the modifications or accommodations you're providing for that specific limitation.

You may be wondering how to write a good description.

☼ PPT 127

PG 36

Be specific. Include the following elements:

What the accommodation or modification is. Notice that this description doesn't have a generic statement saying that Lynsey needs written reminders, but specifically indicates what she is using for a written reminder.

Why the participant needs this accommodation. This helps you see the connection between the broad category listed under what the accommodation is for, and the accommodation you provided. It isn't just repeating the limitation you chose in the dropdown.

When the participant needs this accommodation. This could be a certain time of day, for certain types of activities, appointments, or for all interactions with the W-2 agency and activity providers.

How to make this accommodation possible. Remember, the W-2 agency is responsible for providing the accommodation, and you need to document how you plan to achieve that.

And, **Who** has what responsibilities in providing the accommodation. In this example, Lynsey is responsible for carrying a notebook with her. Anything else is the W-2 agency's responsibility.

Did you notice how these elements tie into the BEST approach? A well written description shows that you've explored and acknowledged the participant's needs, defined roles and responsibilities for the participant and activity provider, and balanced the participant's need for the accommodation with the need to complete W-2 activities.

PG 37

It's your turn to determine a good accommodation description. In your Participant Guide, you will see five examples with two different accommodation descriptions. Work with a partner to pick the description you think is better.

Note to Trainer: Go over the answers after all groups are finished or ten minutes have passed.

PPT 128

Our first example is an accommodation for medical conditions. **Ask** Which description did you choose, A or B?

Answer: A

Ask What makes description A better?

Possible Answers: gives information on how the W-2 agency can ensure the accommodation is provided, includes the why and the when

PPT 129

Ask What about the accommodation for memory deficits? Which description did you choose?

Answer: B

Ask What makes description B better?

Possible Answers: includes a specific way she will record information, more specifics as to what she needs to record and how she will use the recordings to help her, lists a more specific way to help providers know she will need her cell phone

PPT 130

Next is an accommodation for panic and anxiety. **Ask** Which description is better?

Answer: B

Ask What makes description B better?

Possible Answers: provides specific options for the accommodation, describes when to use the accommodation, doesn't just repeat the limitation

☼ PPT 131

Our fourth example is an accommodation for concentration deficits. **Ask** Which is the better description?

Answer: A

Ask What makes description A better?

Possible Answers: lists a specific accommodation she needs, explains why she needs it in a positive way

☼ PPT 132

Lastly, we have an accommodation for a visual impairment. **Ask** Which description did you choose?

Answer: B

Ask What makes description B better?

Possible Answers: specifies when the limitation occurs, provides a free resource for the W-2 agency or worksite provider to use, indicates an action to take instead of letting Terrell figure it out himself

Great job choosing accommodation descriptions.

☼ PPT 133

As we said earlier, you must provide participants with a written description of the accommodations you're providing by using the Services and Accommodations to Help You Do Your W-2 Activities form. WWP conveniently provides a link to this form on the **Participant Barrier** page. You can transfer most of the information you entered on the **Participant Barrier** page to this form, adding in specific activities the participant is assigned that need an accommodation, and how you will apply the accommodation to that activity. Note that, per policy, this form is considered confidential. Be sure to advise other W-2 education, training, or work site providers of any reasonable modifications or accommodations the participant needs to successfully complete their assigned activities.

Accommodations Brainstorm Blast

☼ PPT 134

PG 38

Purpose: Learners identify the benefits of using BEST when talking to participants about accommodations.

Materials: Four sheets of flip chart paper, each with a BEST area written on it (Balance, Exploration, Sensitivity, Trust)

Estimated Length: 10 minutes

Directions to Trainer: Hang the flip chart paper around the room. Learners pick which BEST area to work on; however, limit the number of learners per area based on class size to ensure each area is chosen. Give groups three minutes to compile their lists, then have each group report out.

Suggested Modification: Add an example on the flip chart paper to help each group get started.

Trainer Instructions to Learners: Knowing that you want to include the what, why, when, how, and who in an accommodation description helps you better guide conversations with participants when identifying appropriate accommodations. Let's talk about how applying the BEST approach can be beneficial to both you and participants. We have hung four pieces of flip chart paper around the room, each containing one part of BEST. Choose which area of BEST you would like to focus on and go to that area. However, there can be no more than __ people at a letter.

We are going to have a BEST brainstorm blast. When discussing accommodations, how might you apply this part of BEST? You have three minutes to make a list of examples. **Ask** What can I clarify for you before you get started?

Let's hear from each of our groups, starting with Balance.
Possible responses:

- *Ask participant for accommodation ideas, and search Ask Jan for ideas*
- *Discuss options that will work well for the participant*

Moving right along, let's hear from the group that had Exploration.

Possible responses:
- *When looking at accommodation recommendations, allow time to discuss the details of how that accommodation will be put into action (what, why, how, who, when)*
- *Spend time on Ask Jan if the participant is unsure of accommodation options*

Now let's hear from the Sensitivity group.
Possible responses:
- *Keep in mind that a participant may not have any accommodation ideas, or even know that's an option*
- *Challenge the participant to find ways to still participate instead of not trying an activity*

Lastly, let's hear from the Trust group.
Possible responses:
- *Ensure the participant knows their role in the accommodation as well as the service provider's*
- *Provide the participant with a copy of the Services and Accommodations form to document all roles and responsibilities*

Accommodations Summary

The concept of accommodations may be new to a participant, and using the BEST approach helps you have that conversation in an open and honest way. The BEST approach provides you with the framework to explain what an accommodation is and check for understanding from the participant. It allows you to explore different accommodation options with the participant to help them be successful. And, it allows you to gently challenge the participant to discuss what they might need to successfully complete an activity, as opposed to thinking they just can't participate in that type of activity. Lastly, documenting the accommodation information shows that you identified a need and defined the roles and responsibilities for the participant and service provider.

Over the last two days, we've discussed the principles of assessment, the BEST approach, and how to weave them into your everyday conversations about W-2 assessments, goals, and activities. We also talked about how participants' assessment, goal, and activity information are interconnected.

Making the Connection

Making the Connection

☼ PPT 135

PG 39

Purpose: Learners make connections between assessment, goals, and activities.

Materials: One of each of the following for each group – case files (includes 2 copies of basic case information, Informal Assessment summary, PIN comments, and current EP summary), Agenda Map, copies of Additional Information (at least one copy of each per group)
Estimated Length: 60 minutes

Directions to Trainer: **Part One:** Divide learners into groups of 4-5. Provide each group with a case file and a blank Agenda Map. Allow 10 minutes for groups to review the contents of the file, answer the questions in the Participant Guide, and fill in the Agenda Map.

Part Two: Display the topics the participant wants to cover during the appointment. Allow five minutes for groups to discuss the participant's concerns, answer additional questions, and make adjustments to the Agenda Map.

Part Three: Trainers should set up two stations with the additional pieces of information. Assign groups to a trainer. When learners come to the trainer for additional information, give them the pieces related to the topic(s) they requested. A group cannot receive more than six pieces of additional information. Allow 20 minutes total for this. Learners can ask for information during the first 15 minutes.

Trainer Instructions to Learners: **Part One:** Let's explore those connections one more time. You'll be working in groups with a participant you're meeting for an ongoing appointment. Her name is Courtney. She's 29 years old and has one daughter. She's currently placed as a CSJ. A few minutes before your appointment, you review some of Courtney's information to prepare for the ongoing appointment. You'll find this information in the case file we've provided to each group. In the case file, you'll find Courtney's basic information, her Informal Assessment summary, some recent PIN comments, a summary of her current EP, and a printout of the past six weeks of her Participation Calendar. There are two copies of each document in the case file for you to share with your group-mates.

Your group also has a blank Agenda Map. You have 10 minutes to review the information in the case file, then determine the following:

- What additional information would be helpful?
- What are the topics you need to address at the appointment?

Fill in up to six circles in the Agenda Map with the topics you would like to cover with the participant.

Note to Trainer:
Possible suggestions if groups can't think of topics to cover:

- *Activity Updates*
- *Review Goal Steps for progress*

- *Supportive service needs*
- *W-2 Assessment*
- *Recent participation/activity logs*

☼ PPT 136

Part Two: When Courtney arrives to her appointment, she mentions she has three things she would like to cover, including:
- Worksite
- Increase in stress
- Upcoming doctor appointment

You have five minutes to review the agenda map and make any changes, additions, or notes based on this new information.

☼ PPT 137

Part Three: Now that you have an agenda map and notes about additional information you may need, it's time to explore these areas further with Courtney. Take a look at the categories on the screen. Using your agenda map and notes as a guide, you can ask Courtney for more information or revisit information you already have in any of these areas. Your group has the opportunity to select up to six additional pieces of information to help you move forward during this appointment. You must choose the pieces of information you want, one at a time, any time within the next 15 minutes.

We all know, things can change rather quickly, especially as new information comes to light. As your appointment with Courtney progresses, make notes of how the information you're gathering impacts your initial plan for this appointment.

As we mentioned, your options for the categories you can choose from are listed on the screen. These are upcoming doctor appointment, increase in stress, new support group, career assessment results, primary employment goal update, other program goal update, personal goal update, worksite evaluation, work experience update, employment search update, GALE course update, and participation update.

You will have a total of 20 minutes to gather and review the new information and make recommendations for this case, specifically regarding the impact on:
- Assessment
- Goals
- Activities

☼ PPT 138

Debrief:
- What types of information did you gather from your conversation with Courtney?

- How did you determine which additional information would be most helpful in this situation?
- How did the additional information you gathered affect your initial plan for the appointment?
- What impact did the new information have on Courtney's assessment, goals, and activities?
- In what ways could you apply BEST (balance, exploration, sensitivity, trust) during this appointment with Courtney?

Every group started with the same case and determined how they wanted to follow-up with Courtney. You used the information you gathered to make connections between assessment, goals, and activities. These connections impacted your meeting agenda and next steps in different ways. Paths can be different based on the information you have, case management decisions, and the connections you make along the way.

Note to Trainer: Point out evaluations on the tables.

Wrap-up

☼ PPT 139

PG 40

Network of Support

Purpose: Learners illustrate the importance of using the BEST approach in case management.

Materials: Loosely rolled ball of yarn, a photo of a family (to represent the families participating in the W-2 program)

Estimated Length: 30 minutes
Directions to Trainer: Direct learners to a large enough space to form a circle (shoulder to shoulder). Remind learners that the prompt is displayed on the screen. The trainer starts first making their statement. Then the trainer wraps the end of the ball of yarn around a finger and rolls the ball to someone across the circle. The person who receives the ball shares their statement, loops the yarn around their finger, and then passes the ball to someone else. This repeats until everyone has shared their statement and is holding onto the yarn.

After everyone shares, learners take a step back while still holding the yarn to form a tight "network of support so no one falls through the cracks." Place the photo of a family in the middle of the web. Select a few people, one at a time, at various points of the circle, to release their yarn until the photo falls through. Debrief as a large group.

Trainer Instructions to Learners: We'd like to end the day by hearing your ideas. Take a moment to read the prompt in your Participant Guide and think of a response. Keep in mind, you will share this with the large group.
Now, I'd like to invite everyone to form a circle, and we'll share our responses to the prompt. I'll begin by sharing my response, then hold on to the end of this ball of yarn with my finger and toss it to someone across the circle. That person will share their statement, loop the yarn around their finger, and then toss the ball of yarn to someone else. We'll continue this until everyone has the opportunity to share.

As you can see, we are all connected by this web of yarn, similar to how using the BEST approach and applying the principles of assessment are woven into everyday case management. Now, I'd like everyone to take a step back to form a "tight network of support so no one will fall through the cracks."

I've added a picture of a family to the center of our network. Remember, the participants and their families are at the center of our work. Right now, we have a solid foundation to support them. Now, if one of us were to let go of the yarn, it weakens our network. As more people let go, our foundation begins to disappear, and the participant and their family are impacted.

Debrief:
In what ways are you inspired and encouraged by the level of commitment in this room?

☼ PPT 140

We'd like you to leave with one final thought…
"One good conversation can shift the direction of change forever."

Participants come to you looking for assistance. How can you use what you've learned to have the BEST conversations with participants?

TN Appendix A – W-2 Assessments: Mix, Match, and Master

Informal Assessment

An ongoing case management practice that starts during the W-2 application period and continues until the individual no longer receives W-2 services.

Having a conversation with a participant during an ongoing appointment.

Formal Assessment

Establishes the extent and severity of any disabilities or other concerns that may interfere with normal functioning in an employment setting or with a person's ability to meet W-2 program requirements.

A report from a doctor indicating restrictions and accommodations for the participant.

Career Assessment

Obtains a greater awareness about an individual's work styles, skills, and interests.

O*Net Interest Profiler

Job Readiness

Gathers information about how ready an individual is for employment, including information about work preferences, history, applications, interviews, and contacts.

What kind of job would you like? Are there any job or work situations you prefer to avoid?

Educational Needs

Determines if the individual needs, or would benefit from, education or training activities, including a course of study for granting a declaration of equivalency of high school graduation.

TABE

Vocational Assessment

Helps individuals living with a disability establish realistic employment goals and a plan to achieve them.

A report from DVR that may include an answer to 'What services do you think you might need to reach your employment goal?'

W-2 Assessment Answer Sheet

Informal Assessment
- Definition: An ongoing case management practice that starts during the W-2 application period and continues until the individual no longer receives W-2 services.
- Example: Having a conversation with a participant during an ongoing appointment.

Formal Assessment
- Definition: Establishes the extent and severity of any disabilities or other concerns that may interfere with normal functioning in an employment setting or with a person's ability to meet W-2 program requirements.
- Example: A report from a doctor indicating restrictions and accommodations for the participant.

Career Assessment
- Definition: Obtains a greater awareness about an individual's work styles, skills, and interests.
- Example: O*Net Interest Profiler

Job Readiness
- Definition: Gathers information about how ready an individual is for employment, including information about work preferences, history, applications, interviews, and contacts.
- Example: What kind of job would you like? Are there any job or work situations you prefer to avoid?

Educational Needs
- Definition: Determines if the individual needs, or would benefit from, education or training activities, including a course of study for the granting of a declaration of equivalency of high school graduation.
- Example: TABE

Vocational Assessment
- Definition: Helps individuals living with a disability establish realistic employment goals and a plan to achieve them.
- Example: A report from DVR that may include an answer to 'What services do you think you might need to reach your employment goal?'

TN Appendix B – Goal Types

Primary Employment

Short-term goals, which include the employment outcome the participant is striving for during their participation in W-2; the participant's main field of interest.

Secondary Employment

Short-term goals, which include the employment outcome the participant is willing to pursue during their participation in W-2; the participant's back-up field of interest.

Long-term Career

Part of the participant's long-term career plan; the participant's employment goals and Other Program Goals should fit into this longer-term career plan.

Other Program

Concrete short-term goals or outcomes that the participant must achieve through program participation in order to move in the direction of their employment goals; may involve completing education or training courses, acquiring work experience, or overcoming a barrier.

Personal

Important to the participant, but not required for W-2 participation; set by the participant that will strengthen the family and empower the participant to achieve their employment goals.

Primary Employment Goal

Goal Name: Activities Assistant

Goal Description: Candace enjoys working with people with disabilities and those who need assistance completing activities of daily living. She would like to explore opportunities in this field, perhaps working in an assisted living or nursing home facility.

Secondary Employment Goal

Goal Name: In-home Caregiver

Goal Description: Candace has previous experience working as an in-home caregiver. Although her first preference is to work in a more structured setting, she also enjoys helping clients out in their own homes.

Long-term Career Goal

Goal Name: Become a Registered Nurse

Goal Description: Candace has always wanted to be an RN. She would love to help families navigate complex medical issues.

Other Program Goal

Goal Name: LPN Certification

Goal Description: Candace liked working as a CNA and thinks LPN is the logical next step on the way to her long-term career goal. She thinks now is a good time to further her education because she has more free time now that her daughter is in school.

Personal Goal

Goal Name: Reduce Stress

Goal Description: Candace knows she has a lot of stress in her life, and she needs to find ways to deal with it. She will try various coping strategies, such as drawing, journaling, yoga, and exercise to reduce her stress level.

Trainer Appendix D – Activity Codes and Descriptions

Round One:

BE Adult Basic Education (ABE)	**HE** HSE (High School Equivalency Diploma)
GE GED (General Educational Development)	**WE** Work Experience
JS Job Skills Training	**ES** Employment Search
FC Family Member Treatment/Counseling	**CA** AODA Counseling

CM Mental Health Counseling	**PA** Parenting Skills
PD Personal Development	**LF** Life Skills
Complete classes and study time to increase math skills in preparation for tech school placement exam.	Complete classes and study time to prepare for high school equivalency exams.
Complete classes and study time to prepare for a general education certificate.	Gain data entry skills by participating in work training at a local business.

Gain data entry skills by completing the training certification program.	Connect with local employers in the data entry field to learn about and apply for job openings.
Attend joint counseling session with your daughter.	Attend counseling appointments for continued addiction recovery.
Attend counseling appointments to work on coping strategies for general life challenges.	Use the tools on myplate.gov to complete a weekly meal plan that focuses on nutritious dinners for the whole family.
Use the tools on myplate.gov to create a personalized food plan to help you lose weight.	Attend the Establishing Healthy Eating Routines by Using MyPlate workshop.

Round Two:

JS Job Skills Training	**TC** Technical College Activities
TT Technical College Study Time	**MP** Ongoing Medical/Personal Care
PD Personal Development	**PR** Physical Rehabilitation
CE Career Planning and Counseling	**JR** Job Retention Services

MO Job Readiness/Motivation	**CC** Child Care Related Activities
DR Drivers Education	**HR** Housing-Related Activities
Attend administrative professional classes at the local technical college.	Complete study time for assigned classes.
Attend CNA classes at the local technical college.	Go to the YMCA three times a week to partake in fitness classes of your choosing.

Attend monthly appointments with doctor to manage chronic pain.	Complete aquatic therapy at the YMCA two times per week with physical therapist
Meet with the HR Director at Kohler to complete an informational interview.	Attend weekly appointment with Job Developer to create resume and develop interview skills.
Touch base with W-2 Case Manager on Wednesdays at 4pm to discuss employment.	Use YoungStar to research childcare facilities near your home.
Complete online driver's education class through justdrivewi.com.	Apply for housing assistance to help get a place of your own.

Trainer Appendix E – Making the Connection

This Appendix contains the following materials for the activity:

Part 1
- Basic Information pages
- Participation Calendars
- Agenda Map

Part 3
- Update Cards
- Career Assessment
- Worksite Evaluation

Making the Connection – Basic Information

Participant: Courtney
Age: 29
Children: Daughter – Lilyanna – Age 11
Placement: CSJ

Informal Assessment Summary:

Languages: Reads, Writes, and Speaks English

Work History:

- Currently Unemployed/Looking for work
- Previous Work History:
    - Assistant Manager – Applebees
    - Bartender - Applebees
    - Hostess/Server - Applebees
    - Crew Member – Culvers
- Completed a career assessment

Education History: Has her HSED

Housing: Rents (unsubsidized) $780/month

Transportation: Has a vehicle and valid driver's license

Participant Barriers: Identified that she has some anxiety. Has never been diagnosed and does not believe it will impact her W-2 participation.

Child and Youth Supports:

- Lilyanna does not have special needs
- Daughter attends afterschool program

PIN Comments

You've reviewed PIN comments from the last appointment and any contacts in-between. Here are the things that stood out to you:

- Emailed about a new support group she found and wants to know if it can go on her EP.
- Called last week to report that she's not sure about her worksite, wants to talk about it in-person.
- Goal step under the Other Program Goal to be completed by next appointment.
- Emailed to let you know she was not able to complete her activities last Thursday and Friday due to being sick.

Employability Plan Summary:

Dates:
Begin Date: Four weeks prior to today
End Date: Six weeks from today
Goals:

- Primary Employment: Assistant Restaurant Manager – Courtney has experience in this type of position and enjoyed doing it.
- Secondary Employment: Bartender – Courtney has her license and a lot of experience as a bartender.
- Other Program Goal: Learn more about Serve Safe courses to find certifications that will help to achieve employment goals.
- Long Term Career Goal: Restaurant General Manager – Courtney would like to eventually become the General Manager at a restaurant. She believes that this is a good goal for her in the long run.
- Personal Goal: Include Lilyanna with meal planning and cook at least 3 dinners per week together.
- Personal Goal: Set aside time for self-care daily.

Employment: NA

Activities:

- Employment Search – Focus employment search efforts on jobs in the restaurant/food service industry.
- Job Club – Attend weekly to meet local employers, practice interview skills, obtain job leads, network with fellow job seekers, and work on job readiness skills.
- Work Experience (started four weeks ago) – Volunteer at the local food pantry.
- Personal Development (online) – journal daily; use Google or Pinterest to look for journaling prompts.
- Job Readiness and Motivation – GALE Course: Complete the Certificate in Food, Nutrition, and Health course.

Supportive Services:

- Transportation Funding: Gas cards to get to and from activities.

«

W-2 Participation Calendar

?

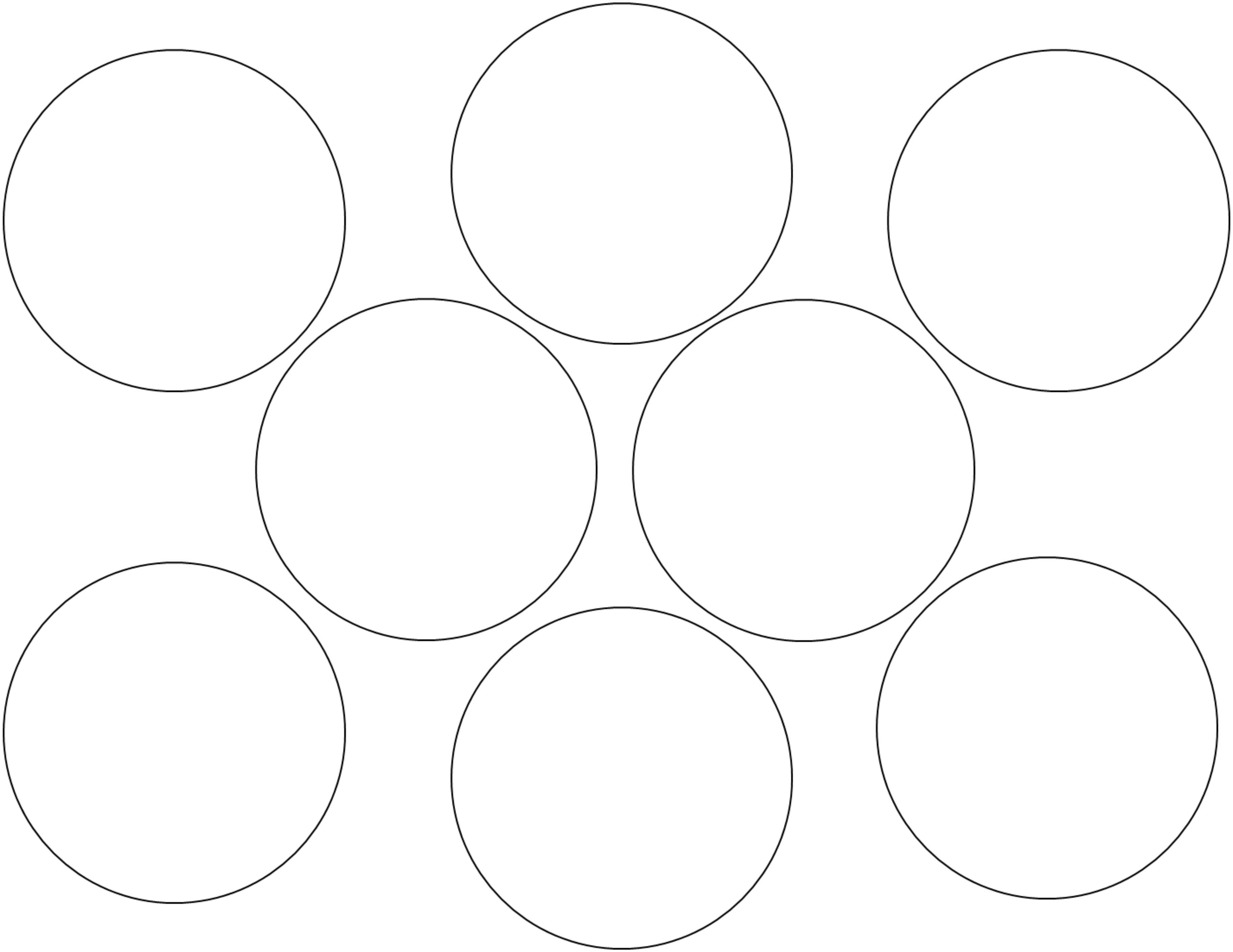
COURTNEY PARTICIPANT
1234567890

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	15	16 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	17 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	18 ES - 2.0 | 2.0 | 0.0 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	19 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	20 ES - 2.0 | 2.0 | 0.0 MO - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	21
Good Cause	22	23 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	24 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	25 ES - 2.0 | 2.0 | 0.0 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	26 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	27 ES - 2.0 | 2.0 | 0.0 MO - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.0 | 1.0 PD - 0.5 | 0.5 | 0.0	28
Good Cause	29	30 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	31 ES - 2.0 | 1.5 | 0.5 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	1 ES - 2.0 | 1.5 | 0.5 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	2 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	3 ES - 2.0 | 1.0 | 1.0 MO - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.0 | 1.0 PD - 0.5 | 0.5 | 0.0	4
Good Cause	5	6 ES - 2.0 | 2.0 | 0.0 WE - 4.0 | 4.0 | 0.0 PD - 0.5 | 0.5 | 0.0	7 ES - 2.0 | 1.0 | 1.0 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	8 ES - 2.0 | 1.5 | 0.5 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	9 ES - 2.0 | 0.5 | 1.5 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	10 ES - 2.0 | 1.0 | 1.0 MO - 2.0 | 2.0 | 0.0 WE - 4.0 | 3.0 | 1.0 PD - 0.5 | 0.5 | 0.0	11
Good Cause	12	13 ES - 2.0 | 0.5 | 1.5 WE - 4.0 | 3.0 | 1.0 PD - 0.5 | 0.5 | 0.0	14 ES - 2.0 | 0.5 | 1.5 | 1.5 WE - 4.0 | 0.0 | 4.0 | 4.0 PD - 0.5 | 0.5 | 0.0	15 ES - 2.0 | 0.5 | 1.5 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	16	17	18

W-2 Participation Calendar

COURTNEY PARTICIPANT
1234567890

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	12	13	14	15	16 ES - 2.0 | 0.0 | 2.0 | 2.0 WE - 4.0 | 0.0 | 4.0 | 4.0 PD - 0.5 | 0.0 | 0.5 | 0.5	17 ES - 2.0 | 0.0 | 2.0 | 2.0 MO - 2.0 | 0.0 | 2.0 | 2.0 WE - 4.0 | 0.0 | 4.0 | 4.0 PD - 0.5 | 0.0 | 0.5 | 0.5	18
Participation Good Cause	19	20 ES - 2.0 | 0.5 | 1.5 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	21 ES - 2.0 | 1.0 | 1.0 WE - 4.0 | 3.5 | 0.5 PD - 0.5 | 0.5 | 0.0	22 ES - 2.0 | 0.0 | 2.0 PD - 0.5 | 0.5 | 0.0 LF - 3.0 | 3.0 | 0.0	23 ES - 2.0 WE - 4.0 PD - 0.5	24 ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	25
	26	27 ES - 2.0 WE - 4.0 PD - 0.5	28 ES - 2.0 WE - 4.0 PD - 0.5	1 ES - 2.0 PD - 0.5	2 ES - 2.0 WE - 4.0 PD - 0.5	3 ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	4
	5	6 ES - 2.0 WE - 4.0 PD - 0.5	7 ES - 2.0 WE - 4.0 PD - 0.5	8 ES - 2.0 PD - 0.5	9 ES - 2.0 WE - 4.0 PD - 0.5	10 ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	11
	12	13 ES - 2.0 WE - 4.0 PD - 0.5	14	15	16	17	18



Upcoming Doctor Appointment:
Courtney informs you she is about 7 weeks pregnant. She has an appointment with her doctor next week to confirm the pregnancy and discuss her options. The father of the baby is her ex-boyfriend. She broke up with him about six months ago, but they got back together briefly a little over a month ago. She hasn’t told him yet.

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Courtney states that she is more stressed out than she was the last time she saw you. She's been dealing with her mom's issues and now her own medical issues.
She tells you that her mom's drinking is getting out of control and she's afraid to
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Primary Employment Goal Update:
Courtney said she’s not sure if she still wants to pursue a job in the food service industry. She said that she’s always worked in food service, so she knows a lot about it, but does not like the idea of working nights and weekends the rest of her life, and not being home with her kids. She would like to explore other jobs where she may be able to apply some of her skills and learn more. She’s especially interested in jobs that are available during child care hours.

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- Goal Step: Research Serve Safe courses by next appointment.

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- Goal Step: Check out cookbooks geared toward cooking with kids.
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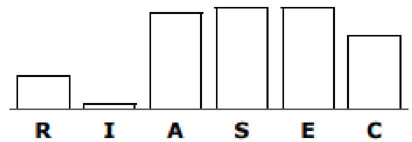
O*NET Interest Profiler: Score Report

Your interest results:

Realistic	8
Investigative	1
Artistic	**24**
Social	**25**
Enterprising	**25**
Conventional	18



Realistic
Your score: 8

People with **Realistic** interests like work that includes practical, hands-on problems and answers. Often people with **Realistic** interests do not like careers that involve paperwork or working closely with others.

They like:

- Working with plants and animals
- Real-world materials like wood, tools, and machinery
- Outside work

Investigative
Your score: 1

People with **Investigative** interests like work that has to do with ideas and thinking rather than physical activity or leading people.

They like:

- Searching for facts
- Figuring out problems

Artistic
Your score: 24

People with **Artistic** interests like work that deals with the artistic side of things, such as acting, music, art, and design.

They like:

- Creativity in their work
- Work that can be done without following a set of rules

Social
Your score: 25

People with **Social** interests like working with others to help them learn and grow. They like working with people more than working with objects, machines, or information.

They like:

- Teaching
- Giving advice
- Helping and being of service to people

Enterprising

Your score: 25

People with **Enterprising** interests like work that has to do with starting up and carrying out business projects. These people like taking action rather than thinking about things.

They like:

- Persuading and leading people
- Making decisions
- Taking risks for profits

Conventional

Your score: 18

People with **Conventional** interests like work that follows set procedures and routines. They prefer working with information and paying attention to details rather than working with ideas.

They like:

- Working with clear rules
- Following a strong leader

Special Notice: Proper Use of O*NET Interest Profiler Results

You **should use** your **O*NET Interest Profiler** results to explore the world of work and identify careers that may satisfy what is important to you in a job-your interests. You will be able to look at the interests satisfied by careers and compare them to your own interests. Talk to a vocational/employment counselor or teacher for more help on how to use your **O*NET Interest Profiler** results.

Your **O*NET Interest Profiler** results **should not be used** for employment or hiring decisions. Employers, education programs, or other job-related programs should not use your results as part of a screening process for jobs or training.

If you think that your **O*NET Interest Profiler** results are being used incorrectly, talk to your vocational/employment counselor, teacher, or program administrator. You also can contact the National Center for O*NET Development for assistance via email: O*NET Customer Service (onet@onetcenter.org)

O*NET Interest Profiler: Social Career List

Your interest results:

Realistic	8
Investigative	1
Artistic	**24**
Social	**25**
Enterprising	**25**
Conventional	18

Your Job Zone:

Job Zone One

Little or No Preparation Needed

Social careers that fit your preparation level:

- Dining Room & Cafeteria Attendants & Bartender Helpers
- Fast Food & Counter Workers

Other careers in the Social interest area:

Job Zone Two: Some Preparation Needed

Ambulance Drivers & Attendants
- Bus Drivers, Transit & Intercity
- Childcare Workers
- Crossing Guards & Flaggers
- Customer Service Representatives
- Flight Attendants

Food Servers, Nonrestaurant
- Funeral Attendants
- Home Health Aides
- Hosts & Hostesses, Restaurant, Lounge, & Coffee Shop
- Lifeguards, Ski Patrol, & Other Recreational Protective Service Workers
- Locker Room, Coatroom, & Dressing Room Attendants
- Medical Secretaries & Administrative Assistants
- Nannies
- Personal Care Aides
- Physical Therapist Aides

- Ushers, Lobby Attendants, & Ticket Takers
- Veterinary Assistants & Laboratory Animal Caretakers
- Waiters & Waitresses

Job Zone Three: Medium Preparation Needed

- Acute Care Nurses
- Career/Technical Education Teachers, Postsecondary
- Concierges
- Dental Hygienists
- Dietetic Technicians
- Eligibility Interviewers, Government Programs
- Exercise Trainers & Group Fitness Instructors
- Hearing Aid Specialists
- Licensed Practical & Licensed Vocational Nurses
- Massage Therapists
- Medical Assistants
- Nursing Assistants
- Occupational Therapy Aides
- Occupational Therapy Assistants
- Patient Representatives
- Physical Therapist Assistants
- Preschool Teachers
- Psychiatric Technicians
- Radiation Therapists
- Residential Advisors
- Respiratory Therapists
- Self-Enrichment Teachers
- Speech-Language Pathology Assistants
- Tour Guides & Escorts
- Tutors

VOLUNTEER EVALUATION FORM

Date: 6/12/22

Volunteers Name: Courtney F.

Session/Event/Program Date:

Session/Event/Program:

Department:

- [ ] Emergency & Fire Services
- [ ] Event Services
- [ ] Parks Operation & Maintenance
- [ ] Public Works
- [ ] Recreation & Culture
- [x] Other (Specify): Food Program

Position:

Location:

Ratings:

Rating	Performance Level	Description
1	Excellent	Volunteer consistently meets all placement requirements
2	Satisfactory	Volunteer meets basic placement requirements. Requires further development in specific areas
3	Needs Improvement	Volunteer lacks necessary skills for this placement

Category	Rating 1	Rating 2	Rating 3	Comments
Leadership Skills		X		Has potential for growth
Organizational Skills	X			
Public Relations	X			
Attitude		X		
Commitment		X		
Teaching Skills		X		
Safety Practices	X			
Relationship with Other Staff	X			
Punctuality			X	Needs to work on being on time to shifts
Attendance		X		
Capacity to Develop		X		
Evaluation Summary		X		

Trainer Appendix F – Case Manager and Participant Conversation Scripts

Tara's Conversation

Case Manager: Tara, tell me about your first "working" experience; you even can go back to your childhood.

Participant: I had to make my bed and do the dishes after dinner.

Case Manager: How do you remember that making you feel?

Participant: That I was grown up and helping.

Case Manager: What is the next job you can recall?

Participant: I babysat for the family down the street. They had two kids and I helped them on Friday nights. I made them dinner; we usually had pizza, and then played games, had baths, then I watched TV after they went to bed.

Case Manager: What did you like about that job?

Participant: That I was responsible. It made me happy, but sometimes upset because I couldn't go to the Friday night football or basketball games. Sometimes I would tell them I was sick so I could go to the games with my friends.

Case Manager: Did the family ever find out that you were lying?

Participant: Yes.

Case Manager: What happened?

Participant: They stopped calling. I really missed those kids, and the extra cash was good.

Case Manager: Do you think the family was justified in not calling you again?

Participant: Not really; it only happened a few times, and I was just a kid.

Case Manager: Now you have two children. Has anyone not followed through to care for them when you needed?

Participant: Yes.

Case Manager: How did that make you feel?

Participant: Oh, I get where you are going with this. Yea I guess they were right in not calling me.

Case Manager: What were some of the other jobs you had after babysitting?

Participant: I worked at the convenience store on the corner in my neighborhood for a while. My friend got me a job at Wendy's, but I quit there when we got into a fight, and then Walgreen's, but they fired me when I got pregnant and couldn't stand all day.

Case Manager: Tell me more about your job at the convenience store.

Participant: It was an icky place to work and my boss was a creep. Luckily my friend got me a job at Wendy's, and that was fun until she got Employee of the Month and thought she was better than everyone.

Case Manager: Tell me about your friend and her getting Employee of the Month.

Participant: Oh, I think she was the manager's niece.

Case Manager: You don't think she deserved or earned the award.

Participant: Well, maybe. She was there for two years and had this perfect attendance going for her. And I guess it paid off because now she is the assistant manager, and the last I heard is that she is now eligible to be manager of a Wendy's if she wants. She has it made.

Case Manager: How was your attendance at Wendy's?

Participant: It was ok. Sometimes they would give me off when I needed.

Case Manager: What kinds of things did you need off for?

Participant: You know, high school stuff. Games. Hanging out with friends.

Case Manager: Did you enjoy working at a fast food restaurant?

Participant: Yeah, it was ok, discount on food, sometime didn't like the hours.

Case Manager: Did you know that you could work your way up to manager?

Participant: Not then; now I do.

Case Manager: Would you consider working fast food again knowing what you know now?

Participant: If I could be the manager; you know I am 24; and I don't think I could take orders from someone younger than me.

Case Manager: What type of experience or knowledge do you think a manager would need?

Participant: I don't know, just how to do her job.

Case Manager: How about all the things that go into running the restaurant, from cleaning the bathrooms, to making the food, to hiring and supervising, to providing customer service to employees and the outside customer?

Participant: That sounds like a lot of work.

Case Manager: Yes, but I think you've done jobs that were a lot of work; including being a mother.

Participant: Yeah, you're probably right.

Case Manager: What in your previous jobs have you liked doing?

Participant: I liked helping people and talking and playing with little kids

Case Manager: Have you thought about what types of jobs you might do that would include helping people and talking and playing with kids?

Participant: My sister does daycare and so did my aunt. I guess I could do that.

Case Manager: Have you ever looked into all the different types of jobs there are that involve care of children?

Participant: What do you mean?

Case Manager: Well, some examples are in-home care, day care centers, preschools, and schools. Would you like to explore this a little further and try to narrow it down a bit? We should also look at what kind of education is necessary for the different occupations you are interested in. We can do some assessments on your interests, skills, and knowledge to see what may be a good fit for you. We can also then set up a work place visit so you can explore your options first-hand.

Goals Conversation Script

Case Manager: So, based on your previous work history, transferable skills, and interests, we've determined your Primary Employment goal is to find a job as a bank teller, and you're open to finding a job as a cashier as your Secondary Employment goal. We've identified some solid goal steps for you to achieve these goals. Let's look a little further down the road. Tell me about your dream job.

Participant: Well, when I was a kid, I wanted to be a veterinarian. Obviously, that's not going to happen. Like I said before, I just need to find a job fast so I can make some money to pay my bills.

Case Manager: Why did you want to be a veterinarian?

Participant: I've always really liked animals and wanted to help them. I had a lot of pets growing up and thought it would be cool to get paid to hang out with animals all day. But it's super expensive and takes way too long to get a degree. And I don't think I could ever put a dog or cat down. That would be really hard.

Case Manager: That would be difficult, especially given how much you love animals. Have you experienced losing a pet at a vet's office?

Participant: I did. I had to have one of my cats put down last year. I had her since I was a kid and she was old. It was tough for me to say good-bye, but I know she was in pain and there was nothing else they could do. The vet and other staff were really nice about everything. They even sent me a sympathy card a couple days later.

Case Manager: It sounds like they really care about the people they work with, not just the animals.

Participant: They do. It was always fun taking my cat there for her regular appointments. Everyone was super friendly and gave my cat lots of attention.

Case Manager: Your career assessment shows you really like interacting with people. And, in your Primary Employment and Secondary Employment goals, you will have lots of opportunities to interact with people. What are some jobs, other than a veterinarian, that would allow you to interact with both people and animals?

Participant: I guess I haven't really thought about that. I suppose working in an animal shelter, but I think that's mainly volunteers. Maybe a dog groomer or dog trainer?

Case Manager: Have you thought about the other jobs available in a vet's office?

Participant: Hmm… (pauses). I hadn't given it a lot of thought. But I guess there are some jobs there that could be fun. The place I take my cats to has a receptionist. She's really nice and always pets all the animals coming in. And she always seems to be in a good mood. I think I could handle petting dogs and cats all day.

Case Manager: What else does the receptionist do?

Participant: She checks everyone in as they come in for their appointments. And she answers the phone to schedule appointments. She does a lot of paperwork and keeps track of the files, which seems like a lot, especially when they are busy.

Case Manager: Does she handle any of the billing?

Participant: Yeah, I almost forgot about that. After my cat's appointments, I have to stop by her desk to pay the bill.

Case Manager: What other jobs are there in a vet's office?

Participant: There's also the people that help the vet. You know, they're kind of like nurses. They take you back to a room, check the pet's temperature and ask questions to get things ready for the vet. I think they're vet assistants, or maybe vet techs? They get to interact with animals and people, but they don't have to do some of the icky stuff that vets have to do. I think I could see myself doing a job like that. I wonder how you'd get a job like that?

Case Manager: That's a good question, and something we certainly could explore. How would you feel about setting your Long-Term Career Goal as a Vet Tech, and come up with some goal steps that will help you learn more about that field?

Participant: I'm okay with that.

Case Manager: If you learn more about it and find that it's not something you want to pursue, we can always change this goal at any time.

Participant: Sounds good to me.

Case Manager: Great! Becoming a vet tech would be a big step. What are some things you think you'll need to do to achieve this goal?

Participant: I should probably look into it some more.

Case Manager: That's a good idea! How could you find out more about this job?

Participant: I'd probably start by googling vet techs and see what's out there. Maybe I could talk to someone who is a vet tech to learn more. I wonder if my vet's office would let me hang out with one of the techs for a day to see what the job is really like.

Case Manager: You've got some really good ideas. Let's explore these a little more and turn them into goal steps. You mentioned googling vet techs. Have you ever used O*NET?

Participant: No, what is it?

Case Manager: O*NET offers a lot of great information on all different types of jobs. You can find out things like job skills, education and training requirements, labor market information, wages, and employment trends for just about any job out there.

Participant: That sounds good. I'll definitely check it out.

Case Manager: You also mentioned talking to a vet tech at your vet office, and maybe even spending some time there to see what it's really like. You could conduct an informational interview with a vet tech to learn more about the job from someone who is actually doing it.

Participant: What do you mean by informational interview? What's that?

Case Manager: Good question! An informational interview is basically a conversation in which you get to talk someone already doing the job you're interested in and ask questions about the different aspects of their job. It can be helpful to hear first hand what the job is really like.

Participant: I like that idea! I'm pretty sure one of the techs at my vet office would be willing to answer my questions.

Case Manager: Nice! And you may even consider interviewing more than one tech, or a tech from a different office. You also said you might like to job shadow a tech to see what their day looks like.

Participant: Yeah, I think that would be a lot of fun. And it would be nice to see all the things they do, since I only see what they do when I bring my cat in. I'm sure there's a lot of behind-the-scenes stuff that I don't know about.

Case Manager: Perfect! We were able to identify your Long-term Career goal as becoming a vet tech, and came up with some solid goal steps to help you work toward achieving your goal. Let's move on to… (fade to black)

Activities Conversation Script

Case Manager: Now that we've reviewed your goals, let's talk about what you need to do to reach them. But first, tell me what you're working on with the FSET program.

Participant: My FSET worker just has me looking for jobs and going to Job Club every week to meet with employers.

Case Manager: I'd like to hear a little more about that. How's that going?

Participant: It's going okay. I usually get most of my job search done on my own, but sometimes I feel like I'm looking at the same jobs every day. I'm not sure what else to do. I guess Job Club is all right, too. Sometimes I'm not interested in the employers that are there, but I get to practice interviewing.

Case Manager: Even though you are completing your job search, you could use some guidance on additional job search resources.

Participant: Yeah, I know there's a lot of stuff out there. I just don't know what it is or how to use it.

Case Manager: Would you be interested in hearing about some of the job search resources we offer through the W-2 program?

Participant: Sure.

Case Manager: We offer facilitated job search at our office. You would come at a designated time and search for jobs in a computer lab setting. Our Job Developer, Jen, is in the room and available to help at any time. She can offer suggestions on where to look for jobs, feedback on how to answer questions, and general guidance on employment searching.

Participant: Does this mean I would only do my job search at the office? I think it would be nice to have the help, but sometimes I find the best time for me to look for jobs is on my phone after the kids are in bed.

Case Manager: You can certainly do both if you choose to. How many hours of employment search are you currently doing for FSET?

Participant: I'm supposed to do 10 hours per week. Sometimes I can get it all done, but I usually miss a couple hours because I don't know what else to do.

Case Manager: What types of activities do you think are included in job search?

Participant: Isn't it just looking for jobs, then applying for the ones I want?

Case Manager: That's definitely a big part of it. There are other things you can do that also count for employment searching. You can count the time you spend updating your resume or cover letter for specific jobs, meeting with a job developer, preparing for interviews, and researching prospective employers.

Participant: Really? I didn't know I could do all that for employment search. But what do you mean by preparing for interviews? Like, I can count the time I spend getting ready and doing my hair for an interview?

Case Manager: Not exactly. Preparing for interviews could include looking up common interview questions, practicing how you would answer those questions, reviewing the job description for the job you are interviewing for, researching the company you are interviewing with, conducting an informational interview with a professional in your field of interest, and completing mock interviews.

Participant: Huh? That's a lot more than I thought I could do. Will this work for my FSET hours too?

Case Manager: It might. Would you like to set up an appointment where we can meet together with your FSET worker?

…fade out

…fade in

Case Manager: When we spoke earlier about your assessment results and long-term career goal, you said you'd like to become a vet tech so you can work with animals and have lots of interaction with people. We identified some goal steps to help you work toward your Long-Term Career goal. What action do you think you can take now to get started on those goal steps?

Participant: Hmm… I do want to check out the website you mentioned earlier. What was the name again?

Case Manager: O*NET

Participant: Yeah, that one. It sounds like there's a lot of things I can check out. Will this count toward my hours for W-2?

Case Manager: Absolutely, since you'll be doing career exploration and looking at local labor market information for vet techs it will count toward your hours for W-2. You're already doing 10 hours of employment search and 2 hours of Job Club each week. How many hours do you think you could dedicate to this activity?

Participant: Can I do this after Job Club? I'm thinking it would be easy since I'll already be at the job center and can hop on one of the computers in the lab after.
Case Manager: That's a great idea! Would two hours a week be doable?

Participant: I think so.

Case Manager: I know you're concerned about finding a job quickly, and we've found ways to make job search more effective. What else do you think would help you find a job as a…

…fade to black