

# *Trainer's Notes*

## **Building the BEST Connections in Case Management – Virtual Classroom**

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### **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.
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**Materials**

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Laptop and zoom link (a new link is created for each offering)

Sign-in sheet

Course evaluation link (a new link is created for each offering)

Participant Guide

Building the BEST Connections in Case Management – Virtual Classroom PPT

Making the Connection: Courtney's Additional Information Links

**Career Assessment -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/Career\\_Assessment\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/Career_Assessment_HO.pdf)

**Employment Search Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/ES\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/ES_Update_HO.pdf)

**GALE Course Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/GALE\\_Course\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/GALE_Course_Update_HO.pdf)

**Increase in Stress -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/Increase\\_Stress\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/Increase_Stress_HO.pdf)

**Other Program Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/OtherProgram\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/OtherProgram_Goal_Update_HO.pdf)

**Participation Tracking Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/Participation\\_Tracking\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/Participation_Tracking_Update_HO.pdf)

**Personal Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/Personal\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/Personal_Goal_Update_HO.pdf)

**Primary Employment Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/PrimaryEmployment\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/PrimaryEmployment_Goal_Update_HO.pdf)

**New Support Group -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_C\\_M/Courtney\\_Additional\\_Info/Support\\_Group\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_C_M/Courtney_Additional_Info/Support_Group_HO.pdf)

**Upcoming Doctor Appointment -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Doctor\\_Appointment\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Doctor_Appointment_HO.pdf)

**Work Experience Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Work\\_Experience\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Work_Experience_Update_HO.pdf)

**Worksite Evaluation -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Worksite\\_Evaluation\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Worksite_Evaluation_HO.pdf)

**Suggested Pace**

This is a 14-hour course. The following agenda is the suggested pace for each day.

**Day 1**

<b>AM Session Timing</b>	<b>Topic</b>	<b>PM Session Timing</b>
9:00 – 9:25	Welcome, Introductions, Learning Objectives, Six-Word Memoir Activity	12:30 – 12:55
9:25 – 9:50	Assessment and Case Management through Principles of Assessment	12:55 – 1:20
9:50 – 10:05	Using the BEST Approach with Assessment Principles through Exploration	1:20 – 1:35
10:05 – 10:50	Active Listening through Trust	1:35 – 2:20
10:50 – 11:05	Break	2:20 – 2:35
11:05 – 11:45	Best Conversation – Tara's Interview through Energizer: Mr. & Mrs.	2:35 – 3:20
11:45 – 12:15	Applying BEST to W-2 Assessments through Creating Open Ended Questions	3:20 – 3:50
12:15 – 12:30	Day 1 Wrap-Up – Colleague Q & A	3:50 – 4:05

**Day 2**

<b>AM Session Timing</b>	<b>Topic</b>	<b>PM Session Timing</b>
9:00 – 9:05	Day 2 Opening	12:30 – 12:35
9:05 – 9:35	Job Readiness Follow-Up Questions through Listen to Reflect	12:35 – 1:05
9:35 – 10:00	Formal Assessment Agreement through Energizer: Rainbow Yoga	1:05 – 1:30
10:00 – 10:30	Applying Assessment Principles to Employ Plan-Goals through Goals Benefits Showcase	1:30 – 2:00
10:30 – 10:45	Break	2:00 – 2:15
10:45 – 11:35	SMART Goals through Breaking Goals into Steps	2:15 – 2:50
11:35 – 12:05	Energizer: What is This through Goals Summary	2:50 – 3:20
12:05 – 12:20	Day 2 Wrap-Up – Rock, Paper, Scissors	3:20 – 3:35

**Day 3**

<b>AM Session Timing</b>	<b>Topic</b>	<b>PM Session Timing</b>
9:00 – 9:10	Day 3 Opening	12:30 – 12:40
9:10 – 9:25	Applying Assessment Principles to EPs – Activities, Activity Codes,	12:40 – 12:55
9:25 – 10:00	Analyzing Activities Round 1	12:55 – 1:30
10:00 – 10:05	Energizer: Can You Spot It?	1:30 – 1:35
10:05 – 10:40	Analyzing Activities Round 2	1:35 – 2:10
10:45 – 11:00	Break	2:10 – 2:25
11:00 – 11:25	Tying Activities to Goals and Assessment Info through Using BEST with Activities Network Activity	2:25 – 2:50
11:25 – 11:35	Activities Summary through Show Us Energizer	2:50 – 3:00
11:35 – 12:00	Applying Assessment Principals to Accommodations through Myth or Fact	3:00 – 3:25
12:00 – 12:15	Day 3 Wrap-Up	3:25 – 3:40



**Day 4**

<b>AM Session Timing</b>	<b>Topic</b>	<b>PM Session Timing</b>
9:00 – 9:05	Day 4 Opening	12:30 – 12:35
9:05 – 9:40	Gathering Accommodation Information (JAN) through Energizer- Brain Teasers	12:35 – 1:10
9:40 – 10:05	Accommodation Descriptions through Brainstorm Blast	1:10 – 1:35
10:05 – 10:15	Accommodation Summary through Energizer- Name the Classic	1:35 – 1:55
10:15 – 10:30	Break	1:55 – 2:10
10:20 – 11:20	Making the Connection	2:10 – 3:10
11:20 – 12:10	Day 4 Wrap-Up	3:10 – 4:00

## Welcome/Introduction

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### PPT 1

Thanks for joining us for Building the BEST Connections in Case Management!  
The topics in this course relate to a quote from 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 few 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

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### PPT 3

### PG Cover

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

**Note to Trainer:** Put the following in the chat:

- Star – Excited to learn more about
- Checkmark – Find Challenging
- Question Mark – Curious About

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

## *Six-Word Memoir Activity*

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### 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. Instruct learners to write down as many words or phrases as they can think of to describe themselves (how they see themselves; their strengths; their weaknesses; their likes, interests, and life experiences; their relationship to others; how they see the world).

**Part 2:** Give learners 2-3 minutes to create a life memoir, using only six words. The memoir can be a sentence, or a simple phrase(s). Inform learners they will be sharing their memoir with a small group.


**Part 3:** Send learners into breakout rooms, with three or four learners in each room. Groups may share only their memoir at this time. No other statements or explanations should be given, and no questions should be asked. Give them 4 minutes.

**Trainer Instruction to Learners:** Let's jump 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:**  Use the words and phrases you wrote down describing yourself to create your memoir, using only six words. Record the memoir at the bottom of your Participant Guide page. Your memoir can be a sentence, or a simple phrase or phrases. You will share your memoir in breakout groups. You have three minutes to write your memoir. Here are some examples for you.

 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.

**Part 3:** Next, we're going to put you into a breakout room. Share your memoir with your group. Offer no additional statements or explanations. As group mates, you do not ask questions when others share their memoirs. After everyone has had a chance to share their memoir, return to the main training room. You have four minutes.

**Note to Producer:** Put learners into breakout rooms of 3-4. Schedule the breakout rooms to end after 3 minutes, with a 60 second countdown.

### 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.

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## Assessment and Case Management

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### PPT 5

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

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### *Defining Assessment and Case Management*

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### PPT 6

### 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:** None

**Estimated Length:** 15 minutes

**Directions to Trainer:** Divide learners into four groups. Assign groups one and two to Assessment, and assign groups three and four to Case Management. Send learners to breakout rooms for 5 minutes, with a 1-minute countdown. When learners return from

the breakout room, ask each group to report out. The trainer who is sharing the screen will type the answers into the text box.

**Trainer Instruction to Learners:** Throughout this class, we will be talking a lot about Assessment and Case Management.

In a moment, we'll send you to breakout rooms. Each room is assigned to focus either on Assessment or on Case Management. With your group, brainstorm words, phrases, and examples that relate to your assigned word. Record your responses in your Participant Guide. When you return, the person with the longest name will report out. You have 5 minutes.

Let's hear from each group. As the other groups report out, in your Participant Guide, circle any similarities you hear from the other group that has the same word as your group. Star the similarities you hear from the groups who did not have the same word as your group.

**Ask** What are some of the similarities you heard from the group who shared the same word as your group? What similarities did you hear from the other groups?

**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.

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### ***Energizer: Solve the Word Puzzles***

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#### PPT 7

**Estimated Length:** 5 minutes

**Trainer Instruction to Learners:**

It is time to give your brains a break with one of our energizers. This one is called Word Puzzles. In a moment, six word puzzles will appear on your screen. When you know the answer to one of the puzzles, unmute and shout it out.

WEAR  
LONG

Long Underwear

SNOW WIND RAIN  
FEELING                      Feeling under the weather

STEP  
PETS  
PETS                              One step forward, two steps back

OHOLENE                      Hole in One

1 2 3 4 <sup>5</sup> 6 7                      High five

AMUOUS                      Ambiguous




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## Principles of Assessment

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☀ PPT 8

📄 PG 6

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 9

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.

**Ask** What are some ways people gather assessment information? Use your text annotation tool to record on the screen the many 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.

[Clear annotations]

### PPT 10

Many of the ways you identified that people gather assessment information involve conversation.

### PPT 11

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 12

After teachers, scientists, marketers, and data analysts gather assessment information, they don't simply file it away unexamined.






### PPT 13

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.

### PPT 14

As you'll see throughout the next four 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 15

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 our approaches may need to be individualized to be best suited to the applicant or participant with whom we are working.


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## Using the BEST Approach with Assessment Principles

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 PPT 16 PG 7

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.

BEST stands for  Balance, Exploration, Sensitivity, and Trust. We'll take a closer look at each of these in a few moments.

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 the participant and hinders your ability to gather the information you need.

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.




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**Balance**

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 PPT 17 PG 8

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 18

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 19

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


 PPT 20

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 21

Applying Balance in case management means you are 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 22

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 are 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 is 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.*

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## Agenda Mapping

### ☀ PPT 23

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 is 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 to encourage collaboration and partnership between you and participants, and may help 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*




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## Exploration

 PPT 24 PG 9

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



 PPT 25

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 needs of the participant?

It is 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 26

To gain a better understanding of the participant's situation,  practice active listening and  look for cues, both verbal and non-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.

You may try asking open questions, like we just talked about, or using reflective statements or summaries to check for understanding. 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.

### **Active Listening – Real Play**

 PPT 27

 PG 9

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


**Materials:** None

**Estimated Length:** 30 minutes


**Directions to Trainer:** Place learners into groups of three or four, and send groups to breakout rooms for 20 minutes, with a one-minute countdown. **Display** the PPT in the breakout rooms. Ask one member from each group to use a phone or watch as a timer. Trainers put the instructions for each role into the chat. Allow 15-16 minutes for groups to work together, then allow 5 minutes for debriefing the questions in their Participant Guide within their groups.


**Trainer Instruction to Learners:** We're going to take some time to practice follow-up questions by engaging in a real-play experience in breakout rooms. A real-play differs from a role-play, in that you are being you, so you are asking and answering questions as yourself, rather than playing a role.

You will be working in groups of 3-4 in breakout rooms. If you have a working camera, it is helpful to use it when you are Person A or Person B, so group members can see your non-verbal cues. All group members will have the opportunity to ask questions, answer questions, and observe. If you are 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 asked by the Listener:

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

 **Listener** – After the Talker gives their initial answer to their chosen question, ask follow-up questions 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 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. One member from each group will use a watch or cell phone as a timer for the interactions. Groups of 3, set your timer for 5 minutes. Groups of 4, set your timer for 4 minutes. Rotate alphabetically by first name after each interaction, resetting your timers accordingly. After your final rotation, answer the questions in your Participant Guide, then discuss your answers with your group.

**Note to Trainer:** After 15 minutes have passed, send a broadcast message reminding learners to answer the questions in their PG.

Welcome back. We hope you enjoyed the real play activity. Remember, when practicing active listening and asking follow-up questions, try asking open questions or using reflective statements and summaries to check for understanding.



This leads us to our next step, Sensitivity.


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## Sensitivity

 PPT 28

 PG 10

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 are saying, and what they are not saying. This goes beyond what they tell you verbally. What about the non-verbal cues? If you are 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 are 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 29

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


**Materials:** None


**Estimated Length:** 7 minutes

**Directions to Trainer:** Break learners up into three groups. Send groups to breakout rooms for 5 minutes, with a 1-minute countdown to create their list of verbal and non-verbal cues. Keep track of the score, and give each group one point for every unique cue they listed that is not a match to another group. After groups return, trainers call out a letter A – Z, and learners put their answer in the chat.

**Trainer Instructions to Learners:** Think 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 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. The person in your group whose birthday is closest to today will record your answers and report out to the large group. You will have only 5 minutes to create your list. When we return to the large group, be ready to report out. What questions can we answer before you're sent to breakout rooms?

#### PPT 30

When you notice a verbal or non-verbal cue, 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 them. 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.


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## Trust

### PPT 31


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 themselves. Here's an example:

### PPT 32




**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 33

**Empowering Response:** Our Job Developers offer a resume writing workshop right here 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?

### PPT 34

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

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### BEST Conversation – Tara's Interview

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 PPT 35

 PG 11

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 that uses the BEST approach. As you listen, write down examples in your Participant Guide of the Case Manager using the BEST approach.

**Note to Trainer:**  **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.

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### Applying Assessment Principles to W-2 Assessments

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 PPT 36


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

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## Types of W-2 Assessments

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### *W-2 Assessments: Mix, Match, and Master*

 PPT 37 PG 12 & 13

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

**Estimated Length:** 13 minutes

**Directions to Trainer:** Learners work to match the definition, assessment types, and examples in the PG. When learners think they have made the correct matches, ask them to put their favorite emoji in the chat. After everyone has finished, review each assessment type.

**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. In your Participant Guide, there is a list of Assessment Types, definitions, and examples. We want you to match the definition and example to the correct assessment type. When you think you have made all the correct matches, put your favorite emoji in the chat so we know you are done. You will have eight minutes. Is there anything I can clarify for you?

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

Let's look at the correct matches for each assessment type and think about how they can benefit participants.

 PPT 38

### 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.

How can this assessment benefit a participant? Let's flood the chat with your answer to that question. I'll give you 45 seconds to compose an answer, and when I say go, hit enter to flood the chat. **Ask** How does informal assessment benefit a participant? Go!

### ☀ PPT 39

#### **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.

**Ask** How can this assessment benefit a participant? I'll give you 45 seconds to flood the chat again. Remember, don't hit enter until I say go.

### ☀ PPT 40

#### **Career Assessment**

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

**Ask** How can the career assessment benefit a participant? You have 45 seconds to compose your answer. Flood the chat when I say go.

### ☀ PPT 41

#### **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?

**Ask** How can this assessment benefit a participant? Get those answers ready, and wait for me to say go.

### ☀ PPT 42

#### **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

**Ask** How can this assessment benefit a participant? Hopefully, you know the drill by now. You have 45 seconds.

## ☀ PPT 43

### 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?'

**Ask** How can this assessment benefit a participant? Last, but not least, is our final flood the chat. Start composing those answers, and wait for me to say go.

***Energizer: Mr. & Mrs. Wright***

## ☀ PPT 44

**Estimated Length:** 5 minutes

**Note to Trainer:** Stop sharing the PPT for this energizer so learners can see each other.

**Directions to Trainer:** Turn on your webcam, and read the passage about Mr. & Mrs. Wright to learners.

### Trainer Instructions to Learners:

I'm going to tell you a story about Mr. and Mrs. WRIGHT. Every time you hear the word right, turn your head to the right and then back to the front. Every time you hear the word left, turn your head to the left and then back to the front. The goal of this game is to turn your head correctly each time the words are said. Are you ready?

This story is about Mr. and Mrs. WRIGHT, a two-parent household family participating in W-2. It was a cool, autumn day when Mr. and Mrs. WRIGHT were getting ready to meet with their W-2 Case Manager.

"Here is my Participation Log. Can you look at it to see what I have LEFT to do?" Mr. WRIGHT said.

"What?" exclaimed Mrs. WRIGHT, "We only have 15 minutes LEFT before our appointment." "Sorry," said Mr. WRIGHT, "but I forgot to have you check it last week because I accidentally LEFT it at my worksite."

Mrs. WRIGHT sighed loudly, as she pulled on her jacket. "I'll look at it in the car," she said, "I can't believe you LEFT this for the last minute again."

As they LEFT the house, Mr. WRIGHT felt a giddy about the surprise he had LEFT for Mrs. WRIGHT in his logs.

“Dear, I think this is a mistake, this can’t be RIGHT?” questioned Mrs. WRIGHT. “Huh? What do you mean?” “I think you are missing some hours. You see RIGHT here? You LEFT out the Resume Workshop!” she reminded him. “I didn’t forget. I went to the workshop, but I had an interview that morning. I let the instructor know and LEFT early.” Mr. WRIGHT explained, “Although, I was there for two and a half hours. When I LEFT, there were only 30 minutes LEFT of the workshop.” Mrs. WRIGHT said, “That’s fine, we’ll ask at the appointment what the RIGHT way to document that would be.”

Mr. WRIGHT was getting more anxious, waiting for Mrs. WRIGHT to discover the surprise. As he turned the car RIGHT into the parking lot of the Job Center, Mr. WRIGHT couldn’t contain his excitement. “Are you done yet? What is LEFT for you to look at?”

Mr. WRIGHT scanned the parking lot for a spot and noticed there was only one spot LEFT. “Wow, the Job Center is busy today,” As he pulled into the last parking spot, Mrs. WRIGHT shouted with excitement, “Really? Is this true?”

Mr. WRIGHT turned to her and smiled, “Yes, it is true! You were RIGHT. I have been patient, and finally found the RIGHT job for me. All that is LEFT is to let our Case Manager know.”

Mrs. WRIGHT handed the stack of paper back to Mr. WRIGHT. “Great Job, Dear! I knew you could do it.” Mr. WRIGHT quickly signed his log, making sure he was WRITING down the RIGHT date. Mr. and Mrs. WRIGHT greeted their Case Manager, “I have some exciting news. I’ve already told Mrs. WRIGHT and my worksite. You are the last one LEFT to notify. I got a job!”

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## Applying BEST to W-2 Assessments




 PPT 45

 PG 14

You use the assessments we just covered to gather the information you 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 46



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 in WWP. 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 47



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 48



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 were not 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'll have, and the participant's options going forward.

## PPT 49

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."

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## Going Beyond What's on the Page

## PPT 50

 PG 15

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.

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***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 51**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 52**Education History:**

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

 PPT 53**Participant Barrier Details:**

- 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 54

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

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### *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 16

Now it's your turn to practice taking closed questions and opening them up. Take the next couple minutes to independently re-write the questions in your Participant Guide so that they encourage further conversation. Put a fun emoji in the chat when you've finished.

**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.

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## Day 1 Wrap-Up

### Colleague Q&A

 PPT 55

 PG 16

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

**Estimated Length:** 15 minutes

**Directions to Trainer:** Give learners three minutes to come up with their questions. Put learners into breakout rooms with a random partner. If there is an odd number of learners, one group will have three. Schedule breakout rooms for nine minutes, with a one-minute countdown to discuss each other's questions.

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

Now that you've had a few minutes to jot down your questions or observations, we'll put you into breakout rooms of 2-3 people. 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'll have the opportunity to ask us any questions your group could not answer when we return to the main room. 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.*

Today, 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 using the BEST approach to going beyond what's on the page when asking questions.

Tomorrow, we'll continue looking at follow-up questions, specifically using the BEST approach in those conversations. We'll discuss the formal assessment agreement form and how to incorporate the BEST approach in those conversations. Finally, we'll spend the majority of the day talking about applying the BEST approach to goals and goal steps.

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## Day 2 Introduction

### PPT 56

Welcome back! Before we get started, I'd like everyone to turn on their webcams, and share one thing that stood out to them from yesterday, and one thing they are looking forward to today. After you share your thoughts, please turn off your webcam and choose another learner to share next. I'll start by picking our first person.

---

### *Job Readiness Follow-up Questions*

### PPT 57

 PG 17-19

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

**Estimated Length:** 15 minutes

**Directions to Trainers:** Divide the class into 5 breakout rooms, and assign each group one section of the **Job Readiness** page (Work Preferences, History, Application, Interview, Contact). Put the assigned section and PG page numbers in the chat prior to moving to breakout rooms. Give them ten minutes, schedule breakout rooms for nine minutes, with a one-minute countdown, to complete their lists. At the end of the ten minutes, have groups report out. **Click** to highlight each section during the report out.

**Trainer Instructions to Learners:** We closed the day yesterday asking follow-up questions, and practiced creating open-ended questions. Now, let's continue our work with follow-up questions. We're going to separate you into five groups and send you to breakout rooms. Each group is assigned one section of the **Job Readiness** page; your assigned group and section is in the chat. 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 10 follow-up questions for that section that you could ask participants. You have 10 minutes. The person in your group who's had the most cups of coffee today is the spokesperson for your group.

What questions do you have before we send you to breakout rooms?

 **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*

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
### ***Using Reflections and Cues***

 PPT 58

 PG 20

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."

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### ***Listen to Reflect Activity***

**Purpose:** Learners practice listening for understanding and reflecting.

**Materials:** None

**Estimated Length:** 10 minutes

**Directions to Trainer:** This activity has two parts. In each part, trainers ask questions, learners respond, and then the correct answer is revealed. 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 using the Annotation Tool stamp to mark on the screen. These questions have a best answer, given the options provided.

**Trainer Instructions to Learners:**

**Part 1:** It's your turn to practice. I'll show a statement on the screen, and I want you to guess what this person might be feeling. Type your guess into the chat, and then take a look at what others have guessed.

 PPT 59

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 minute for learners to type their responses into the chat. Read a few responses out loud before moving on to the next question.

 PPT 60

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 61

I have been in this program for almost six months, and nobody has found me a job.

*Possible Responses: Frustration, Confusion, Upset*


 PPT 62

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, then using the stamp annotation tool, mark your answer on the screen.


### PPT 63

 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.*

[Clear annotations]

### PPT 64

 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.*

[Clear annotations]

### PPT 65

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/or 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.

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## Formal Assessment Agreement

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### PPT 66

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.

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 67

### PG 21-23

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


**Materials:** None

**Estimated Length:** 15 minutes

**Directions to Trainer:** Instruct learners 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, answer the questions in your Participant Guide. The form is found on the two pages following the questions you need to answer. Be prepared to share your answers. You have ten minutes to work independently.

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're 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're 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

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### PPT 68

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.

### *Energizer: Rainbow Yoga*

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### PPT 69

**Estimated Length:** 5 minutes

**Trainer Instruction to Learners:** Let's take a moment to give our minds a break and stretch our bodies.

Sitting straight up in your chair, let your arms hang down loosely at your sides. With your imaginary paint brush in your right hand, paint that rainbow by lifting your extended arm out and over your head. Now, let's paint the other side of the rainbow. With your imaginary paintbrush in your left hand, connect your rainbow up over your head. Now let's add two more colors to your rainbow.

Awesome job! Now that your rainbow is shining over you, let's continue talking about BEST.....

## Applying Assessment Principles to Employability Plan - Goals

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### PPT 70

### PG 24

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

### Goal Types

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

## Wisconsin Says

### ☀ PPT 71


**Purpose:** Learners review Employability Plan Goal Types.

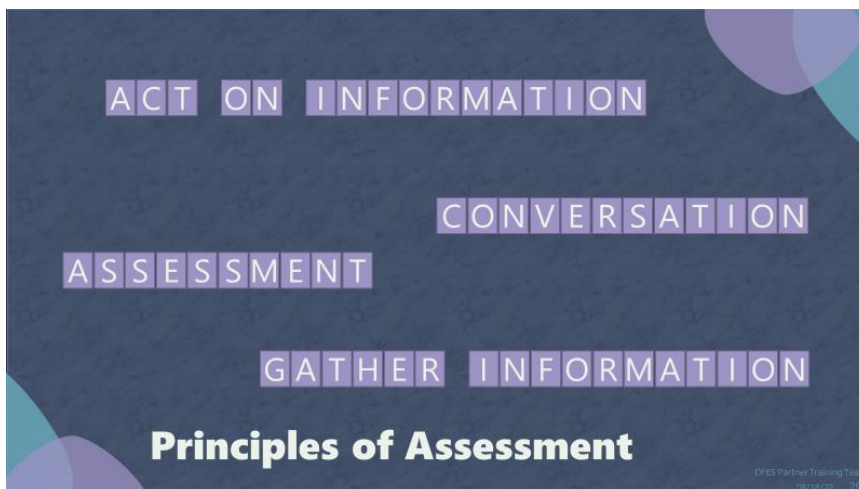
**Estimated Length:** 5 minutes

**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. **Type** a divider in the chat between rounds. Rounds 1 and 2 review material covered earlier. Round 3 transitions to the next section. Each PPT slide is one round.

**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, place an emoji in the chat, we'll call on you to unmute and 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 you started. The third word or phrase is Assessment (**click** to reveal).

**Note to Trainer:**  **Click** on the blocks associated with the correct answer to display the words when learners give a correct answer.



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

### ☀ PPT 72



Fantastic! Let's take a look at one more. All the words are goal types in WWP. Fill these words in your Participant Guide as we reveal the answers.

☀ PPT 73

📄 PG 24

**Note to Trainer:** After all Goal Types are revealed, read the definitions of each type.



**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.

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### **Benefits of Goal Setting for Case Managers and Participants**

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#### PPT 74

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

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### **Goal Benefits Showcase Activity**

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#### PPT 75

#### PG 25

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

**Estimated Length:** 23 minutes


**Directions to Trainer:** Divide class into five groups and assign each group a goal type (primary employment, secondary employment, long-term career, other program, and personal). In breakout rooms, groups have 14 minutes (13 minute breakout room, with 1 minute countdown) to identify the Case Manager and participant benefits of their assigned goal type and create a slogan selling the benefits of creating the goal. Trainers enter the breakout rooms to ensure learners are on the right track. After breakout rooms end, each group's designated spokesperson explains the benefits of their assigned goal type and the trainer documents their answers on the screen using text annotations.

**Trainer Instructions to Learners:** Now you have an opportunity to be the teachers and showcase the benefits of each goal type. You'll be working in groups. Each group will be assigned 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. There is space in your Participant Guide for you to record the benefits of your goal type.

After determining the benefits, work together to create slogans explaining why setting your goal type is beneficial for the Case Manager and the participant. We want you to sell us the importance of setting goals! Let me give you an example. If I'm talking about how the Long-Term Career goal benefits the Case Manager, our slogan may be, "Knowing the participant's big picture helps frame other goals and goals steps." Be sure to designate a spokesperson for your group to report out on your goal type and your slogan when we return to the main session. You have 13 minutes.

**Ask** What questions do you have before we assign your goal type and send you to breakout rooms?

**Note to Trainer:**  **Click** to display slide for annotating group answers.

## PG 26

As groups report out, you can note the benefits of those goals types in your Participant Guide.

### **Report Out/Debrief:**

*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 help 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 is important? What motivates them?*

*Participant – Working toward and achieving personal goals builds self-esteem*

**Ask** What benefits did you hear that you have 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.

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**SMART Goals**

 PPT 76

 PG 27

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 77

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 78

The Specific piece of SMART Goals means that you should make 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 79

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 80

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 81

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 82

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 is a deadline that is long enough to be realistic, but short enough to provide a challenge?


 PPT 83

Not only do the SMART goal criteria help you craft goals on the Employability Plan, but you also can apply them 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 84

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 always are 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 85

However, sometimes you may see regression that causes participants to move backward. Regression is not failure; it is 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.


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***Breaking a Primary Employment Goal into Steps***


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 PPT 86 PG 28


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 is 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 will help 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 is feasible for the participant to  identify 10 prospective employers that are hiring cashiers within the next month.

We also talk to 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 are 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 does not 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 87

 PG 29

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

**Estimated Length:** 35 minutes

**Directions to Trainer:** Return learners to breakout rooms in the groups they worked with previously for the Benefits of Goal Setting activity Provide each group with one goal type and description.. Set breakout rooms to 9 minutes, with a 1-minute countdown.

As groups report out, Trainer annotates the goal and goal steps on the PPT for each group. After each group reports out, ask the learners not reporting what additional goal steps they may have used in building the goal, or if they would have taken a different approach building the goal steps. Between each goal type take a screenshot of each group's completed goal/goal steps and post it in the chat for learners to have as examples, then clear the annotations.

**Trainer Instructions to Learners:** You'll be returning to the group you worked with for the Goal Types activity. We are giving each group a Goal and Goal Description. Work

together as a group to break your goal into goal steps. Using your goal, write each goal step on the chart in your Participant Guide. Remember to use SMART goal criteria. Be sure to choose a scribe for your group, and prepare to report out on your goal and goal steps when you return to the main session. The goal descriptions for each goal type are located in Appendix A of your guide.

### **Goals/Goal Descriptions**



#### **Primary Employment: 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.*

#### PPT 88

#### **Secondary Employment: 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.*

#### PPT 89

#### **Long-term Career: 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.*

#### PPT 90

#### **Other Program: 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.*

#### PPT 91

#### **Personal: 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.*

### **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?

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### ***Energizer: What Is This?***

**Estimated Length:** 5 minutes

**Directions to Trainer:** Find three to five items from around your home to share with learners using your camera. Ask learners "what is this?" Learners respond with answers that can be anything but the items actual name or normal function. Stop sharing PPT during this.

**Trainer Instruction to Learners:** It's time for another brain break! In a moment, I am going to show you an object in my camera, and ask you, 'What is this?' Your answer can be anything, except the actual name of the item or what its normal function is.

For example, if I show you a paperclip, you could say that it is a leg trap for cockroaches, or fairy ice skates. Put your answer into the chat.

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## **Using the BEST Approach with Goals**

### PPT 92

We've spent a lot of time talking about goals. So far, 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.

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### ***Applying BEST to Goals Activity***

### PG 30

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

**Estimated Length:** 13 minutes

**Materials:** None

**Directions to Trainer:** Divide learners into four breakout rooms. In the chat, list the learners by breakout room. Ask each group to pick a shape on the screen. **Click** on the

selected shape to reveal the topic. Give learners 6 minutes to complete their list. When learners return, have each group report out to the class.

**Trainer Instructions to Learners:** We want to hear your ideas on how you can apply the BEST approach concepts to goal setting with participants. In a moment, you'll be put into breakout rooms, where you'll work together to come up with some 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.

There is space in your Participant Guide to take notes. Take a moment to look in the chat, find your name and breakout room. When I call your group, select a shape on the screen, and I will reveal which topic your group will discuss. When you return, the tallest person in your group will report out.

**Ask** What can I clarify before we begin?

## PPT 93

Welcome back from the breakout rooms. As we share examples for each topic, take notes, in the space provided in your Participant Guide on the topics you did not discuss in your breakout room.

### **Report Out/Debrief:**

*Possible answers:*

*Balance:*

- *Encourage participants to choose goals that are important to them; they do not 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.

You've identified many great ways to incorporate the BEST approach into goal setting conversations with participants.

## PPT 94

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 is it 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 95

### PG 31

We're going to watch a video that shows an example of a goal setting conversation between a Case Manager 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.

## PPT 96

**Note to Trainer:**  **Click** to play the video. After the video is finished, break learners into groups of four, and send them to breakout rooms for six minutes to discuss and


answer questions in the Participant Guide. There will be no large group report out for these debrief questions. After a couple minutes, go into each breakout room to observe and answer any questions learners may have. If you hear anything concerning or anything that is a very good point, use your discretion to determine if it needs to be discussed as a large group.

**Say** In a moment, we'll send you out to breakout rooms. With your group, answer the remaining questions and complete online search listed in your Participant Guide. You'll have six minutes.

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## Goals Summary

### PPT 97


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 is helpful in starting this conversation; you can use the findings from many different types of assessments to start this conversation.

Speaking of assessment results, what happens if you are having a goal setting conversation with a participant, and you realize that their stated goals do not 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.

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### ***Day 2 Wrap-Up- Rock, Paper, Scissors***

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 PPT 98

 PG 32

Before we end today, let's take a moment to reflect on what we learned so far. What was the rock of today's session (foundational, useful)? What did you write down on paper so you will remember it (something new you learned)? What can be cut out or changed with scissors (case management approach, your work, habits, etc.)?

Who would like to start? Please share at least one thing.

That's all we have for Day 2. Thanks for your participation and we will see you back here tomorrow, same time, same link.


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### ***Day 3 Opening- 10 Words or Less***

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 PPT 99

 PG 32

Look back at your notes from yesterday, if you had to summarize what you learned yesterday in 10 words or less, what would you say  (it can be a phrase or a combination of keywords)? Use the space in your Participant Guide to write your phrase or key words. We will give you a couple of minutes to gather your thoughts and then ask a few of you to share.

Today we'll look at how you can put BEST into practice when assigning activities and determining appropriate activity codes. You'll have lots of time to practice tying activities back to goals and assessment information while using the BEST approach. Let's get started!

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### **Applying Assessment Principles to Employability Plans - Activities**

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 PG 33


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, fill in the blanks in your


Participant Guide with the words from the word bank. When you're finished, put your favorite color in the chat.


**Note to Trainer:** Instruct learners to begin. After colors have flooded the chat, go through the correct answers.


## ☀ PPT 100

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.

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## Activity Codes

## ☀ PPT 101



### PG 33 (bottom of page)

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** or **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.

**Ask** What questions do you have about assessment activity codes?

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

## *Analyzing Activities – Round 1*

### PPT 102

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

**Materials:** None

**Estimated Length:** 70 minutes

**Directions to Trainer:** Create four groups. Put group numbers and learner names in the chat. 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 that the group will use for the first part of this activity. Groups will identify at least one key similarity and difference among their assigned codes, using the W-2 Manual Appendix (put link in chat prior to sending learners to breakout rooms). Put groups into breakout rooms for a total of 10 minutes.

After the groups return to the main room, have the groups report out in the order that they are listed in the TN, starting with **BE/GE/HE**, and encourage learners to complete the corresponding charts in their guide. After a group reports out, move on to sample activity descriptions for those codes, instructing learners to use their stamp annotation tool to indicate which activity description best matches the activity code on the screen. If learners match the codes and descriptions correctly, acknowledge this and move on. If

not, add some clarification as to why certain codes are correct. Repeat this process for the three remaining sets of codes.

Then move to round two, allowing groups to pick a gift to display their codes, sending them to breakout rooms, reporting out, and choosing activity descriptions.

 PG 34

**Trainer Instructions to Learners (Round 1):** We've divided you into four groups. Take a look in the chat to note which group you are in. In a moment, we'll ask you to select a gift on screen, revealing a set of three activity codes. While in breakout rooms 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 do not need to think of an example activity for each code just yet, as we will 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 103

Now let's determine the codes for your group. When I call on your group, select one of the gifts on the screen, and we will 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. Put the link to the W-2 Manual (<https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>) in the chat prior to sending learners to breakout rooms.

Now that you have your codes, we'll send you to breakout rooms for 10 minutes. We've put the link to the W-2 Manual in the chat. You can find the list of activity codes in the Appendix. **Ask** What may I clarify before we send you out?

 PPT 104

Welcome back! Now, let's hear the key similarity and difference for each set of codes.

**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.*

Thanks for sharing! Before moving to the next set of codes, let's review a few activity descriptions, and select which of these three codes the activity belongs to. When the activity descriptions display on the screen, use your stamp annotation tool to select the correct activity code to use for that activity.

### PPT 105

 **Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

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

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

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

[Clear annotations]

### PPT 106

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 107

Now, we'll see activity descriptions that align with each of these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.

 **Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

Attend joint counseling sessions with your daughter. *Answer: FC*

Attend counseling appointments for continued addiction recovery. *Answer: CA*

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

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

[Clear annotations]

## PPT 108


### **ES/JS/WE**

*Possible Responses:*

- *Similarities: All activities could be targeted to a specific field of interest. Career assessment help 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 109

This brings us to another set of activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.

 **Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

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

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

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

[Clear annotations]

### ☀ PPT 110

#### **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 do not 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 111

Let's take we just learned from this group and apply it to this set of activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.



**Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

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

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

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

[Clear annotations]

As you can see, 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. Notice we didn'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.

**Energizer: Can You Spot It?**

**Estimated Length:** 5 minutes

**Directions to Trainer:** Learners spot objects hidden within the pictures.

**Trainer Instructions to Learners:** Before we dive into round two, let's take a break from all that activity code talk and look at some can you spot it puzzles. In just a moment, we are going to show you a picture with a hidden object. Use your annotation tools to stamp, circle, or mark the hidden object.

 PPT 112

Can you spot the lone bunny in this sea of cats?

**Click** to reveal the answer.

 PPT 113

Can you spot the penguin lost in the flock of toucans?

**Click** to reveal the answer.

 PPT 114

We've got one more. Can you find the lollipop mixed in among the ice cream cones?

**Click** to reveal the answer.

Great job! Now let's get back to activity codes.

**Analyzing Activities – Round 2** PPT 115 PG 35

**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 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 will 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, we will send you to breakout rooms for 10 minutes.

## ☀ PPT 116

### **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 only be assigned if TC is also assigned and is included in the 25 hours of work activities per week.*

## ☀ PPT 117

We are going to continue applying what we learn about each set of codes in round two by looking at activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.



**Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

Complete study time for assigned classes. *Answer: TT*

Attend CNA classes at the local technical college. *Answer: JS*

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

[Clear annotations]

## ☀ PPT 118

### **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 a provider.*

• *Differences: Ongoing Medical/Personal Care is used for participants with ongoing medical appointments or who are facing a 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 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 119

Let's take a look at the activity descriptions for these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.



**Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

Attend monthly appointments with doctor to manage chronic pain. *Answer: MP*  
Complete aquatic therapy at the YMCA two times per week with physical therapist.  
*Answer: PR*

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

[Clear annotations]

## PPT 120

### **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 121

Here's the activity descriptions for these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.



**Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

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

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

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

[Clear annotations]



PPT 122

### 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 123

Now, let's match those codes with activity descriptions.



**Click** to display the activity descriptions; then, after learners are done annotating, **click** again to display correct answers.

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

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

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

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

[Clear annotations]

## PPT 124

Thanks to all groups for sharing. Before we move on to how activities, goals, and assessment information tie together, what questions do you have about activity codes?

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### **Tying Activities to Goals and Assessment Information**

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## PPT 125

### PG 35

Just like information 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 to 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 competing 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 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 is important to plan the activities with them.

## PPT 126

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, 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?

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### Using the BEST Approach with Activities

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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.

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### *Using BEST with Activities Network Activity*

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 PPT 127

 PG 37

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

**Estimated Length:** 15 minutes

**Directions to Trainer:** For five minutes, allow learners to brainstorm examples of how to use the BEST approach with activity assignment conversations. For report out, pick a random learner to share first, then they'll pick who shares next.

**Trainer Instructions to Learners:** How can you use the BEST approach when discussing activity assignment with participants? In a moment, you'll work 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.

### PPT 128

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 129

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 130

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 131

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

Now you'll have five 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.

### PPT 132

### PG 38

**Part 2:** Now that you've had time to think of some examples, let's share our ideas as a group. Starting with the letter B, and working our way to T, share your favorite examples of using the BEST approach, when discussing activity assignments with participants.


When your name is called, tell us one of your examples. After you shared an example, pick someone from the class who has not had a turn. That person shares their favorite example for the next letter. Let's see how many unique examples we can think of. We will go around the group until everyone has had a chance to share. As you are listening, take notes of any examples you might want to try.


Great job sharing your BEST examples! 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 133

#### **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 134

#### **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 135

#### **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 136**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 137

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

 PPT 138 PG 39

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.

**Note to Trainer:**  **Click** to play the video. When the video is finished playing, move the learners into breakout rooms of four learners each. Schedule breakout rooms for five minutes, with a one-minute countdown.

You will be going back into your breakout rooms. With your group, answer the remaining questions on this page of your Participant Guide.

**Note to Trainer:** There will be no large group report out for these debrief questions. After a few minutes have passed, each trainer will join each breakout room and observe the learners' conversations. If you hear anything concerning or anything that is a very good point, use your discretion to determine if it needs to be discussed as a large group.



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## Activities Summary

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### PPT 139

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.

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### ***Energizer: Show Us***

**Estimated Length:** 5 minutes

**Directions to Trainer:** Learners are asked to find items that represent goals, activities, and BEST. Trainers ask learners to find the objects, and learners show the found item using their webcams.

**Trainer Instructions to Learners:** We've got another quick brain break for you with an energizer we call Show Us. Everyone that is able, please turn on your webcams. I will start by asking you to show me an object. As quickly as you can, look around you and grab an item that matches what I am asking. Items can be practical, like activity logs, or could be obscure, like a trophy that represents goals. What do you need clarified before we start?

For the first item, show us something that represents goals.

Next up, show us an object that represents activities.

Finally, show us an item that represents either Balance, Exploration, Sensitivity, or Trust.

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## Applying Assessment Principles to Accommodations

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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 140

### PG 40

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 141

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

**Estimated Length:** 15 minutes


**Directions to Trainer:** Read each statement, and allow learners time to choose their answer using the Annotation Tool stamp. Reveal the answer and discuss additional information for each statement.

**Trainer Instructions to Learners:** Let's start with some myths and facts about accommodations in the W-2 program. Determine if you think the statement is a myth or a fact, and using the Annotation Tools stamp, mark your answer on the screen.

#### PPT 142

##### **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.

[Clear annotations]

#### PPT 143

##### **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.

[Clear annotations]

## PPT 144

### **Statement 3: Identifying Accommodations**

The W-2 agency is responsible for identifying the accommodation the participant needs.

 **Fact:** Per W-2 Manual 1.3.3, 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).*

[Clear annotations]

## PPT 145

### **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. See W-2 Manual 1.3.3 for more examples of accommodations.

[Clear annotations]

 PPT 146**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 6.1.2.1.2, 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 tomorrow.

[Clear annotations]

 PPT 147

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

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**Day 3 Wrap-Up** PPT 148

We are nearing the end of day 3. Before you leave us, please share your thoughts from today. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought to the slide, switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

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**Day 4 Opener: One Word** PPT 149

**Note to Trainer:** Have your webcam on, and encourage learners to do the same.

Welcome back to our final day of Building the BEST Connections in Case Management. We are on the home stretch! Yesterday, we closed out the day discussing some Myths and Facts about Accommodations, and before we dive back into our discussion on accommodations, let's do a quick once around the room to get us back in the BEST mindset.

We'd like everyone to think of one word describing accommodations. You don't need to provide any context, just think of one word. We'll give you a minute or so to think of your

word, and when you're ready, please turn your camera on if you haven't already. I'll start by sharing my word.

Now that we've got our minds buzzing with all things accommodations, let's get to know JAN a bit better.

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### Gathering Accommodation Information (JAN)

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 PPT 150

 PG 41

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. The website, [askjan.org](https://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.

W-2 Manual 1.3.3 contains an updated chart of different disabilities or impairments and examples of accommodations compiled from using JAN and its resources.

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#### *Race to Accommodate*


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**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 by following the link placed in the chat. As learners find accommodations, they use annotations to type their responses in the corresponding box on the PPT.

**Trainer Instructions to Learners:**  AskJan's A to Z List can be helpful for both you and participants when considering types of accommodations. Let's practice using this feature. On our screen, you'll see a disability display. In a web browser, navigate to the AskJan website at <https://askjan.org/>, and use the A to Z List to find a potential

accommodation for that disability. Then add it to the corresponding box on the screen, using the text annotation tool. We've posted the link in the chat for you.

## ☀ PPT 151

🖱 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.

[Clear annotations]

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## ***Energizer-Brain Teasers***

**Estimated Time:** 5 minutes

**Directions to Trainer:** Stop sharing the PPT, and turn on your webcam. Ask learners to do the same. Read the brain teasers/riddles below. When a learner raises their hand, call on them to give their best guess.

**Trainer Instructions to Learners:** We are going to step away from accommodations and give our brains a little break. I'm going to read a riddle/brain teaser. When you know the answer, raise your hand and take your best guess. Please turn on your webcams, so I can see who raises their hand first.

What is as big as you are, and yet doesn't weigh anything? *Your Shadow*

I can run but can't walk, I have a mouth but can't talk, a head but can't think, and a bed but can't sleep. Who am I? *A River*

Paul's height is six feet, he's an assistant at a butcher shop, and wears size 9 shoes. What does he weigh? *Meat*

You can hold it without using your hands or arms. What is it? *Your breath*

How many seconds are there in a year? *Twelve. The 2<sup>nd</sup> of January, 2<sup>nd</sup> of February, 2<sup>nd</sup> of March... 2<sup>nd</sup> of December*

What goes up, but never comes down? *Your age*

You throw away the outside and cook the inside. Then you eat the outside and throw away the inside. What did you eat? *An ear of corn*

Nice job on those, now let's get back to accommodations and what we call our Race to Accommodate.

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### Accommodation Descriptions


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#### PPT 152

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 153

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 154


#### PG 42

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 43

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

**Note to Trainer:** Go over the answers after ten minutes have passed or everyone has finished.

## PPT 155

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 156

**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 157

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 158

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 159

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 160

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 161

 PG 44

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

**Estimated Length:** 12 minutes

**Directions to Trainer:** Create four breakout rooms and assign learners an area of BEST to work on. Give groups five minutes; schedule breakout room for four minutes, with a one-minute countdown, to compile their lists, then have each group report out.

**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 created four breakout rooms, each focusing on one part of BEST. While discussing accommodations, how might you apply your assigned part of BEST?

You have five minutes to make a list of examples of how you might apply BEST to accommodations. To get you started we gave you an example of each in your Participant Guide. Be sure to assign a spokesperson from your group to report out.

**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.*

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## 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 to 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 have defined the roles and responsibilities for the participant and service provider.

Over the last few 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.


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## Making the Connection

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### *Making the Connection*

 PPT 168

 PG 48-53 (Appendix B)

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

**Materials:** Courtney's Additional Information Links

**Career Assessment -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Career\\_Assessment\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Career_Assessment_HO.pdf)

**Upcoming Doctor Appointment -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Doctor\\_Appointment\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Doctor_Appointment_HO.pdf)

**Employment Search Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/ES\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/ES_Update_HO.pdf)

**GALE Course Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/GALE\\_Course\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/GALE_Course_Update_HO.pdf)

**Increase in Stress -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Increase\\_Stress\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Increase_Stress_HO.pdf)

**Other Program Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/OtherProgram\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/OtherProgram_Goal_Update_HO.pdf)

**Participation Tracking Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Participation\\_Tracking\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Participation_Tracking_Update_HO.pdf)

**Personal Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Personal\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Personal_Goal_Update_HO.pdf)

**Primary Employment Goal Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/PrimaryEmployment\\_Goal\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/PrimaryEmployment_Goal_Update_HO.pdf)

**New Support Group -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Support\\_Group\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Support_Group_HO.pdf)

**Work Experience Update -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Work\\_Experience\\_Update\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Work_Experience_Update_HO.pdf)

**Worksite Evaluation -**

[https://wss.ccdet.uwosh.edu/courseware/participant\\_guides/Building\\_Best\\_Connect\\_CM/Courtney\\_Additional\\_Info/Worksite\\_Evaluation\\_HO.pdf](https://wss.ccdet.uwosh.edu/courseware/participant_guides/Building_Best_Connect_CM/Courtney_Additional_Info/Worksite_Evaluation_HO.pdf)

**Estimated Length:** 60 minutes

**Directions to Trainer:** Divide learners into three groups, and assign a trainer to each group. Do not set up an end time for the breakouts. Learners and trainers go into breakout rooms together. Each trainer will continue to share the PPT while in the breakout rooms.

**Trainer Instructions to Learners:** 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.

A trainer is going into breakout rooms with you to provide the information you'll need for Courtney.

**Directions to Trainer Part One (In Breakout Room):** Allow 10 minutes for groups to review the Courtney Case File located in the Appendix of the Participant Guide, answer the questions in the Participant Guide, and fill in the Agenda Map in the Appendix.

**Trainer Instructions to Learners Part One (In Breakout Room):** Locate Courtney's case file in the Appendix of your Participant Guide. The case file contains 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.

You also have a blank Agenda Map in the Appendix of your guide. As a group, 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 Part One (In Breakout Room):**

*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 169

**Directions to Trainer Part Two (In Breakout Room):** Allow five minutes for groups to discuss the participant's concerns, answer additional questions, and make adjustments to the Agenda Map.

**Trainer Instructions to Learners Part Two (In Breakout Room):** 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 170

**Directions to Trainer Part Three (In Breakout Rooms):** Learners request additional information from the trainer. Trainer gives learners the pieces related to the topic(s) they requested, by sharing the link to the specific information in the chat. Clicking the type of information on the PPT makes the category disappear so learners know what they have left to choose from. 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. Move learners back to the whole group for the debrief questions at the completion of the activity.

**Trainer Instructions to Learners Part Three (In Breakout Room):** 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 your trainer for more information about Courtney, 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. This information will be shared with you in the chat. 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 171

### **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:** Add link to evaluation in the chat.

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## Wrap-up

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### *Network of Support*

 PPT 172

 PG 45

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

**Estimated Length:** 30 minutes

**Directions to Trainer:** Prior to this activity, update the slide with learner names in a random order. The trainer starts by sharing their statement, then clicking on the slide for the yarn ball to go to the first learner. The learner shares their statement. Click on the slide again, and the yarn ball moves to the next learner.

After all learners have had a chance to share, click on the stacked ovals icon in the top right corner of the slide, and the picture of the family appears. Click on the picture of the family one time to release one point of the yarn. A second click releases a few points of the yarn; and shows the web collapsing, and the picture shrinking and disappearing. 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.




**Note to Trainer:** Prepare a response to share.



 PPT 173

Now that you have had a few minutes to reflect on the last few days, we'll share our responses to the prompts. Take a look at the screen and note where your name is. I'll start by sharing my response and "toss a ball of yarn." When it lands on you, share your response with the group. As we are sharing, notice what we are seeing on the screen. My response to the prompt is (state your response here, then **click**).

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. We create a tight network of support so no one will fall through the cracks.

 This picture at the center of our network represents the participants and their families, who are at the center of our work. Together, we have a solid foundation of support. If one connection is  broken, it weakens our network. If more connections are  broken, the 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 174

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?

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## Trainer Appendix A – Making the Connection

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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 – Applebee's
  - Bartender - Applebee's
  - Hostess/Server - Applebee's
  - 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

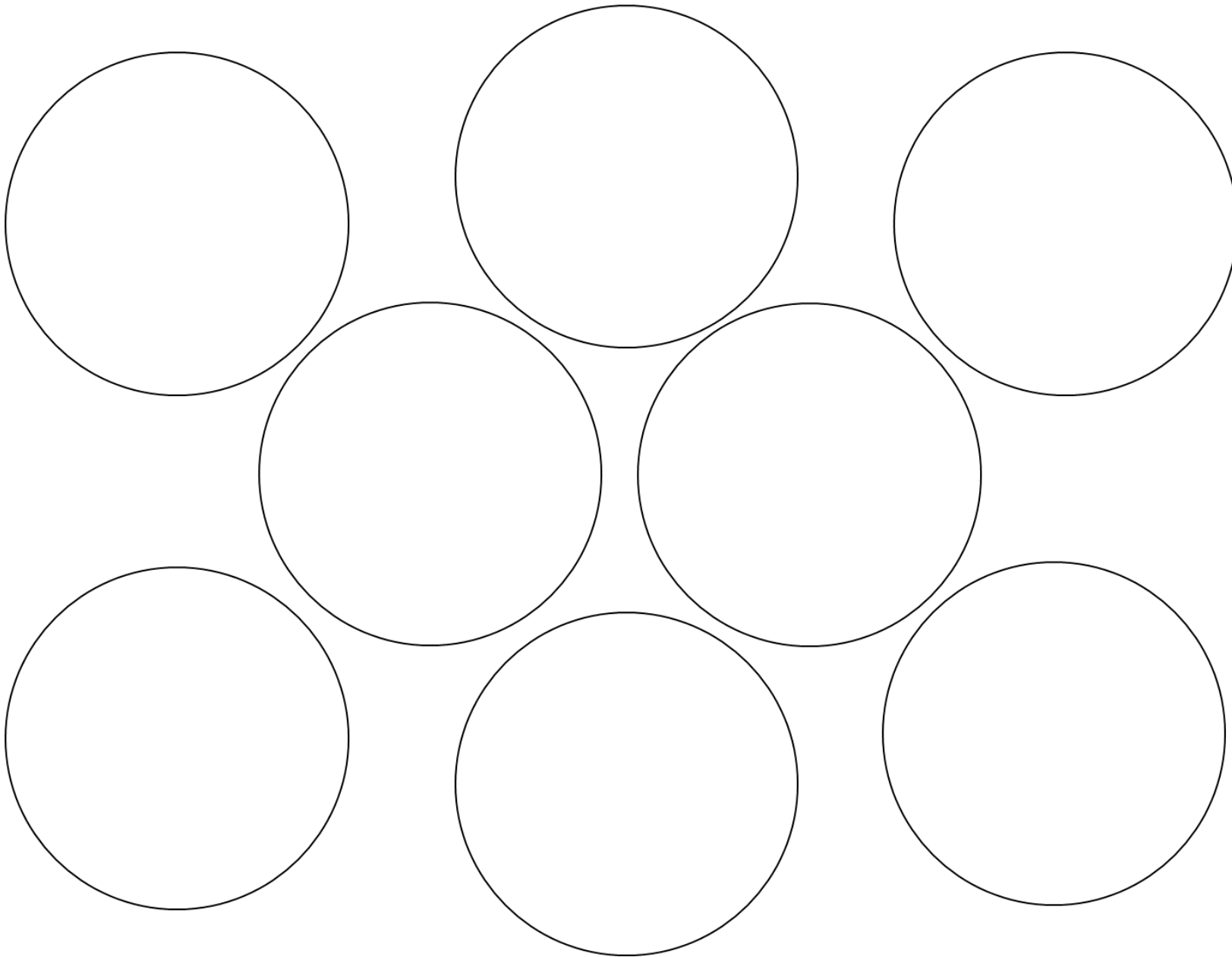
«

# W-2 Participation Calendar ?

COURTNEY PARTICIPANT

1234567890

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	12	13	14	15	16	17	18
					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	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	
<div style="border: 1px solid #ccc; padding: 2px; display: inline-block; margin-bottom: 5px;">Participation</div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Good Cause</div>	19	20	21	22	23	24	25
		ES - 2.0   0.5   1.5 WE - 4.0   3.5   0.5 PD - 0.5   0.5   0.0	ES - 2.0   1.0   1.0 WE - 4.0   3.5   0.5 PD - 0.5   0.5   0.0	ES - 2.0   0.0   2.0 PD - 0.5   0.5   0.0 LF - 3.0   3.0   0.0	ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	
	26	27	28	1	2	3	4
		ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 PD - 0.5	ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	
	5	6	7	8	9	10	11
		ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 PD - 0.5	ES - 2.0 WE - 4.0 PD - 0.5	ES - 2.0 MO - 2.0 WE - 4.0 PD - 0.5	
	12	13	14	15	16	17	18
		ES - 2.0 WE - 4.0 PD - 0.5					



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## Making the Connection – Additional Information

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### **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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### **Increase in Stress:**

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 leave Lilyanna with her. Courtney is afraid this will affect her ability to find and keep a job, because her mom used to watch Lilyanna on nights and weekends when she had to work.

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### **New Support Group:**

Courtney tells you she attended the new support group a couple times. She is attending AL-ANON meetings, which offer her support as a person with a loved one who is dealing with addiction. She said she's glad she found this group, as she only knew about support groups for addicts, not family. It's been nice to talk to people who are dealing with the same sort of stuff.

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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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**Other Program Goal Update:**

- Goal Step: Research Serve Safe courses by next appointment.
    - **Update:** Courtney completed the above goal step. She found out she needs to obtain the Serve Safe Food Protection Certificate (prior to Certified Restaurant Supervisor). She's unsure if she would like to move forward with this at this time.
- 

**Personal Goal Update:**

- Goal Step: Check out cookbooks geared toward cooking with kids.
  - Goal Step: Create a weekly meal plan with Lilyanna.
  - Goal Step: Choose three dinner recipes to make with Lilyanna.
    - **Update:** Said this has been a little more difficult than she thought, as she did not think about how picky Lilyanna is when it comes to food. She plans to continue to work on this, as it's important for her and Lilyanna to eat healthier, especially in her condition.
- 

**Work Experience Update:**

This was going well at first, but now that she's been there a few weeks, she gets bored pretty quickly. She said they only let her stock the shelves and occasionally talk to customers. She'd like more responsibility and to feel like she's really helping other people.

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**Employment Search Update:**

She's finding a lot of places to apply to, but most of them are hiring for entry level positions. She doesn't think the pay will be enough to cover her bills, but is too much that she won't be able to get other assistance. She's also worried that the hours these places are hiring for are mostly nights and weekends. This won't work with her daughter, since she can't count on her mom right now to watch Lilyanna.

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**GALE Course Update:**

She is about half-way through the course and states it is going okay. She is learning some new things, but knew a lot already. Courtney also said that she thinks she likes more of the manager and customer service side of working in restaurants and is not really interested in the food or cooking part.

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**Participation Tracking Update:**

Courtney said she has been late to her work experience a few times. She said there is road construction, and it's taking longer to get there because of the detour. She's also not sure if she wants to continue at her current work experience site. She said it was fun at first, but now it's really boring doing the same stuff every day. Courtney also missed a few days last week due to not feeling well.

She has not completed all of her employment search hours in recent weeks. She said she's feeling burnt out with her employment search. She's seeing the same jobs over and over. She already applied for at least half of the jobs and is not qualified for the other half.

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- Career Assessment Results (see below)
- Worksite Evaluation (see below)

## O\*NET Interest Profiler: Score Report

### Your interest results:

Realistic	8
Investigative	1
<b>Artistic</b>	<b>24</b>
<b>Social</b>	<b>25</b>
<b>Enterprising</b>	<b>25</b>
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](mailto:onet@onetcenter.org) (onet@onetcenter.org)

## O\*NET Interest Profiler: Social Career List

### Your interest results:

Realistic	8
Investigative	1
<b>Artistic</b>	<b>24</b>
<b>Social</b>	<b>25</b>
<b>Enterprising</b>	<b>25</b>
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:

<input type="checkbox"/> Emergency & Fire Services	<input type="checkbox"/> Public Works
<input type="checkbox"/> Event Services	<input type="checkbox"/> Recreation & Culture
<input type="checkbox"/> Parks Operation & Maintenance	<input checked="" type="checkbox"/> Other (Specify): <u>Food Program</u>

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			Comments
Leadership Skills	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	<i>Has potential for growth</i>
Organizational Skills	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	
Public Relations	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	
Attitude	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	
Commitment	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	
Teaching Skills	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	
Safety Practices	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	
Relationship with Other Staff	<input checked="" type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	
Punctuality	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input checked="" type="checkbox"/> 3	<i>Needs to work on being on time to shifts</i>
Attendance	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	
Capacity to Develop	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	
Evaluation Summary	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input type="checkbox"/> 3	