Washington WIC Connects – ENERGIZER:

Completing a Full Assessment before Educating (or getting all the information before giving advice, information, or education)

All staff complete assessments as part of their WIC work each day. This Energizer will share how getting the full picture from clients before offering education or advice applies to all staff –whether assessing income or nutrition risk.

- *Consider this Energizer as a Nutrition Education In-service.*
- *Monthly nutrition in-services for para-professional CPAs require face-to-face contact. Please see the Policy and Procedure manual Volume 2, Chapter 14: Staffing for more information.*
- *Count time spent on this as Nutrition Education in the time study.*

Time: 20 **-** 30 minutes
If you are an individual or you have a small group: read this Energizer, work individually or in pairs, and choose one of the activities on page 6 to practice.

Objective: Explore getting all the information before offering advice, information, or education.

Instructions:

1. **Share** the following:
   A. **Warm Up** – A Color Jacuzzi for sharing, participation, and fun.
   B. **Introduction** – Share why WIC Connects is an important communication tool in completing the assessment before educating (see below).
   C. **Content** – Read or ask a volunteer to read the content section. Share the **benefits for completing a full assessment before educating**.
2. **Lead the group in the Activity** – Discuss the different options to practice waiting to educate until after the full assessment has been completed.
3. **Lead** the group in a facilitated discussion using the **Facilitated Discussion Guide.**
4. **Debrief** and **close** by bringing the whole group together.

1 A. Warm Up: (Optional) – Color Jacuzzi -see page 8 for instructions.

1 B. Introduction:

(If you do the Ice-breaker, start with #1 in italics and continue to # 2 - otherwise skip to # 2)

1. *Thanks for sharing in our Color Jacuzzi. One thing we can see from all the different responses is how different* ***or*** *alike we are. We also see this everyday with our clients. Each person brings their own "Jacuzzi" of ideas and knowledge that may be different from any other person and there are still those things that connect us; like wanting to be the best parent that we can be, or wishing for a happy, healthy future for our children.*

2. WIC Connects helps us to focus on our client's strengths, skills, and knowledge. One way to keep this focus is to hear from the client so that we get the complete picture before offering a solution or education.

1 C. Content:

Motivational Interviewing (MI) experts caution against focusing too quickly on a problem or aspect of a problem.

Let's hear this example: *(ask for volunteers to read the staff and client roles)*

Staff: Hi Serena, I'm glad you're here with Joey for his health assessment.

Serena: Thanks! I've had a bit of a rocky morning. Joey woke up with some red spots – I think it is …

Staff: Oh my gosh, red spots?… I am going to need to reschedule your appointment. We have a group of pregnant women coming in any minute. We can do this appointment sometime in the next few weeks- but for now I will get your checks so you can get out of the clinic before the pregnant women start coming.

Serena: Well,..OK..but, I don't really think it's ...

Staff: Well, we can't be too careful. Go ahead and sign for your checks. I'll write down your appointment time for next week.

Serena: Thanks, but all I was trying to say was I bought some new laundry soap at the Dollar Store last week. He has been spotty and itchy ever since I washed his clothes in it. So this morning I was re-washing his clothes and lost track of the time.

Thanks volunteers for reading this! What are your thoughts after hearing this example? *Hear from the group.*

Although this example is a little exaggerated and most of us would wait to hear more about the "spots" – it does highlight the fact that it is easy to jump in before having all the information.

MI experts advise taking the time to complete a thorough assessment of the client's needs and interests before giving information. As we know in WIC, assessment and education happens everywhere – whether it is as the front desk where you are assessing income, determining if the clients should talk to the certifier about a breastfeeding food package change, or you are in the back office assessing nutrition risks. Each of these interactions can change based on the conversation and how it is allowed to progress.

When thinking of our own communication style, we can ask ourselves these questions, do I jump in before hearing all the information or do I ask more questions? Am I quick to respond with information or do I wait to find out what the client already knows?

The WIC clinic is a busy place where phones are ringing, clients are waiting, and staff are juggling many tasks at one time. It is often difficult to slow down and ask for more information. Allowing clients to tell you their story is more efficient in the long run. Let's consider this example:

Ask for volunteers to read this next example.

Client: I really need help to get my kids to eat the dinner I fix.

Staff: I have some great information about that. It is important for families to eat together and for moms not to be a "short-order" cook for kids. We know that kids eat better and even do better in school when families eat together. Have you thought about setting a regular meal time and trying to always have at least one item on the kids' plate that they will eat?

Client: No, I work a late shift and my husband is the one that is home. If he and the kids don't like the meal that I leave for them, he orders pizza. It's so frustrating! The meal I leave has taken time to prepare and it's better for them than pizza.

In this example, the staff person jumped in to give some great ideas for the client to fix the situation. The problem is these ideas don't fit the actual problem. As WIC staff we often feel like we have some ideas about typical questions and behaviors of our clients. We can easily go down a path with our assumptions and then realize that we spent time talking about something that wasn't the real issue or the highest priority for the client. This is true for all of us in WIC. Have you ever been on the phone with a new applicant, gathered all their household information, and then when you get to the address –they say they live closer to the clinic in the next town over? Or at the very end of a certification the client asks an important question that never even came up during the certification? These are a couple of examples of times when getting the complete picture could save us time and help clients feel heard because we allow time for them to talk.

With these examples in mind, think about your own role in WIC and how this Energizer applies to you. Though the overall topic is about completing a full assessment before education; we can also apply this concept to other conversations where we provide information or advice. Getting a complete picture from our clients can help us communicate and understand the client better.

What are some advantages for the client? (*Hear from the group their thoughts)*

> *Ideas may include: the client feels heard, the client is more engaged, the client comes up with their own solutions, the client feels like they are participating in the conversation, etc…*

Let's take a few minutes to hear some of the benefits to completing a full assessment or getting a complete picture before educating or offering information: (*Hear ideas from the group*)

> *Ideas may include: good use of time by focusing on the highest priority issues; helpful to "correct" incorrect information at the end of a session so it doesn't come across as "criticism" during the conversation; "Bundled information" is easier to remember than providing education after every statement or question.*

Thanks for sharing your ideas.

Often during a certification, while asking the Assessment Questions, or other WIC appointments, a participant asks a direct question or provides a natural opening to provide education, information, or advice before getting all the information. This poses a challenge to staff, who may be tempted to jump into "educator" mode or the "fixer" mode. Of course we want to be sure that the participant knows she has been heard and doesn't feel put off. Ideally we need to wait to provide education, information, or advice until the full *assessment* is completed.

Consider your role in the clinic – how does this apply to you? *(Hear comments from the group.)*

Below are several strategies that may be helpful for you to complete a full assessment before educating.

- ***Ask*** *for a volunteer or volunteers to read these or have people work in pairs.* ***OR***
- ***Ask*** *staff to r**eview** each of the strategies either individually or as a group.*
- *Come back together and **ask** staff to share what stood out to them.*

<u>Strategies:</u>

Set the agenda:

- Let the participant know upfront that you are going to ask some questions first:
    - "*I am going to start by asking a few questions, I will make a note to come back to anything that comes up. Does that sound OK to you?*"
    - *"We ask all clients the same questions. We'll do this quickly so we can talk about your specific questions."*
- At the front desk let the participant know what you are doing:

        - "*I am going to ask you some questions about your income, review the income and ID papers you brought today, and then enter your information into our computer. How does that sound?"*

- Sometimes clients have questions about WIC that they ask while you are getting them ready for their appointment; for example:
    - *"What kinds of foods will I get today?"* You might say: *"That's a great question. Do you mind if I complete all your income information and then come back to that?"*

If asked a direct question:

- Acknowledge the question, "*Thanks for asking about that."* or *"That is a common question."*
- Make a note and assure the participant that you will come back to it. You can use a circle chart, a piece of paper, the appointment summary, etc…
- Ask permission to finish the assessment, "*Do you mind if I finish….and we can come back to that?"*
- Redirect the question if it takes the conversation off track. Summarize or reflect and then return to the focus of discussion, for example:
    - "*Mary, that's a really interesting question about your sister's use of herbal supplements. That's not my area of expertise, so if it's OK with you, I'll see if I can find a resource for you. In the meantime, could we talk a little more about your concerns with your daughter's picky eating?"*
    - *"Mara, you sound really frustrated with your neighbor's smoking. It can be hard to live around smokers when you don't smoke. I can let the certifier know and maybe she can share a resource that might help. In the meantime, what questions do you have about the Rights and Responsibilities form?*

Summarize and prioritize at the end of the assessment:

- Jot down a few notes and then summarize by referring back to them
- With the client prioritize any concerns
- Elicit ideas from the client then offer information on prioritized needs. Answer participant's questions
- If you don't have the answer, let her know you will find the answer and get back to her
- Ask "*Did I miss anything*?" or "*Did I get everything*?"
- Identify next steps as appropriate

2. Practice Activity:

- As a group **review** the 3 ideas below. *Ask for volunteers to read each section.*
- **Lead** a discussion about the different options listed. These are ways to practice waiting until after the full assessment has been completed (or all the information has been gathered). *Be sure to get input from everyone.*
- **Ask** staff to practice one of the ideas discussed over the next couple of weeks. *(Decide whether individuals want to choose their own, or if the whole group wants to choose one to try as a clinic.)*

  - ***Check yourself*** - Now is your opportunity to begin observing yourself! Notice the various topics you discuss during WIC appointments. These discussions may touch on a single subject, lasting only a few moments, or they may take up a few minutes of your time.
    As you become aware of the topics you discuss, observe the timing of these discussions. Are you waiting until you have the full picture?
  - ***Circle chart*** – The circle chart is a tool to keep track of the various topics that come up in an assessment. Any topic needing some discussion or more information is recorded on the chart. A sample blank Circle chart is included in the Participant Copy.
    - Blank Circle Charts – When using a blank circle chart, add information to the circles as they come up in the assessment.
    - Pre-filled Circle Charts - Some circle charts have common topics of discussion already filled in, with a blank circle for the client's own topic. Review the topics recorded on the chart with the participant. Ask which area they are most interested in discussing.
    - After the appointment, take a look at the circle chart and think about when or how you addressed the questions from the participant.
  - *Circle charts in English can be ordered from MyPrint or printed in 8 languages from the WA WIC Website.*
    - ***Observations*** – Observing peers is a great way to learn a lot! Ask a co-worker if you can observe them. As you observe your co-worker, record specific examples of how your co-worker waits until the assessment is complete or waits to offer information until they have the complete picture. If your co-worker gives information before the completing the assessment, record the topics discussed so you can share these observations. Now it is their turn to observe you. Have a quick conversation with your co-worker after the appointment is complete. It will help both of you continue to develop your WIC Connects skills.

3. Facilitated Discussion Guide

Use these questions, or use your own questions, to guide your discussion:

→ What are your comments about this activity?

→ How will completing a full assessment before educating (or waiting to provide information or advice) impact your conversations with clients?

4. Debrief and close:

Ask a question about today's Energizer, such as: How do you see yourself using the ideas we talked about today?

Based on the answers, close with a summary about today's activities: "Let me see if I got it all… you shared ____________ and____________. I also heard that _______________. Did I get it all?

Thank the group for participating!

Ice-breaker Activity:

A COLOR JACUZZI

The object of this group activity is to get people interacting, having fun, and ready to participate in the Energizer.

- The facilitator reads:
  - The color (for example: *Red*)
  - Then reads the associated meaning (for example: *Typically is the turn-off color*).
  - Then asks the corresponding question (for example: *What is the one thing that stops you or is a turn-off related to customer service*).
- Decide if you want to go around the room and hear from each person, or if you want the group to just say their answers in no particular order.

Red typically is the stop or turn-off color - What is the one thing that stops you or is a turn-off related to a customer service experience?

Orange: is the motivation color - What motivates you?

Blue: is the sky's the limit color - What is your favorite thought about your future?

Green: is the WIC Connects color - What is one thing that you like best about using WIC Connects skills?

Feel free to adapt this for your group. If you have a larger group and it would take too much time to go around the room for each person to answer all these questions here are some other ideas:

- Shorten the list of colors by picking one or two colors for people to share.
- Write them on a white board and ask people to walk up and write their answers. Take a few minutes to review and discuss.
- Ask people to write down their favorite color and then share the question and answers for that color.
- Pass around a colorful candy selection (for example M&M's) have people choose at least 10 candies. They can choose all of one color or a variety. The most predominant color in the selection is the one that guides the answer they share. For example, they choose 9 reds and 1 green, they share the answer to the red question. (Note: You may have to adjust the colors to match the candy!)
- Instead of doing the whole list at once, do a couple in the beginning, and then do a couple at the end of the Energizer.
- Make it an *ACTIVE* activity by asking people to walk around and get answers from as many people as possible in an allotted amount of time.

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1. Introduction:

WIC Connects helps us to focus on our client's strengths, skills, and knowledge. One way to keep this focus is to hear from the client so that we get the complete picture before offering a solution or education.

Content:

Motivational Interviewing (MI) experts caution against focusing too quickly on a problem or aspect of a problem. Let's hear this example by having volunteers read the staff and client parts:

Staff: Hi Serena, I'm glad you're here with Joey for his health assessment.

Serena: Thanks! I've had a bit of a rocky morning. Joey woke up with some red spots – I think it is …

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What are your thoughts after hearing this example?

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> **Client**: I really need help to get my kids to eat the dinner I fix.
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> **Staff**: I have some great information about that. It is important for families to eat together and for moms not to be a "short-order" cook for kids. We know that kids eat better and even do better in school when families eat together. Have you thought about setting a regular meal time and trying to always have at least one item on the kids' plate that they will eat?
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> **Client**: No, I work a late shift and my husband is the one that is home. If he and the kids don't like the meal that I leave for them, he orders pizza. It's so frustrating! The meal I leave has taken time to prepare and it's better for them than pizza.

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- Let's **hear** your thoughts about what the advantages are for the client.

- Let's take a few minutes to **hear** some of the benefits to completing a full assessment (or getting the complete picture) before offering education or advice.

Often during a certification, while asking the Assessment Questions, or other WIC appointments, a participant asks a direct question or provides a natural opening to provide education, information, or advice before getting all the information. This poses a challenge to staff, who may be tempted to jump into "educator" mode or the "fixer" mode. Of course we want to be sure that the participant knows she has been heard and doesn't feel put off. Ideally we need to wait to provide education, information, or advice until the full *assessment* is complete.

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<u>Strategies:</u>

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- Redirect the question if it takes the conversation off track. Summarize or reflect and then return to the focus of discussion, for example:
  - "*Mary, that's a really interesting question about your sister's use of herbal supplements. That's not my area of expertise, so if it's OK with you, I'll see if I can find a resource for you. In the meantime, could we talk a little more about your concerns with your daughter's picky eating?"*
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- Ask "Did I miss anything?" or "Did I get everything?"
- Identify next steps as appropriate

2. <u>Practice Activity:</u>

- ➢ As a group **review** the 3 ideas below.
- ➢ **Discuss** the different options listed. These are ways to practice waiting until after the full assessment has been completed (or all the information has been gathered).
- ➢ **Choose** one to practice over the next couple of weeks.

- ***Check yourself*** - Now is your opportunity to begin observing yourself! Notice the various topics you discuss during WIC appointments. These discussions may touch on a single subject, lasting only a few moments, or they may take up a few minutes of your time.

  - As you become aware of the topics you discuss, observe the timing of these discussions. Are you waiting until you have the full picture?

- ***Circle chart*** – The circle chart is a tool to keep track of the various topics that come up in an assessment. Any topic needing some discussion or more information is recorded on the chart. A sample blank Circle chart is included for you on the last page of this Energizer.
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  - After the appointment, take a look at the circle chart and think about when or how you addressed the questions from the participant.

➢ *Circle charts in English can be ordered from MyPrint or printed in 8 languages from the WA WIC Website.*

- ***Observations*** – Observing peers is a great way to learn a lot! Ask a co-worker if you can observe them. As you observe your co-worker, record specific examples of how your co-worker waits until the assessment is complete or waits to offer education until getting the complete picture. If your co-worker gives information before the completing the assessment, record the topics discussed so you can share these observations. Now it is their turn to observe you. Have a quick conversation with your co-worker after the appointment is complete. It will help both of you continue to develop your WIC Connects skills.

3. Facilitated Discussion Guide

→ What are your comments about this activity?

→ What could completing a full assessment (or getting all the information) before offering educating or advice do for your conversations with clients?

4. Debrief and close:

Thank you for participating!

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