Purpose of Individual Assessment Session:
- Build a partnership between you and participant
- Engage participant in assessing herself
- Enable you and the participant to get a picture of where she is now.
- Build an initial plan for moving toward self-sufficiency

Before the Interview
1. Review each section of the Self-Assessment completed by the participant.

2. Use the Pre-Interview Guide to get a picture of where the participant says she is now. Listen to her/his voice first.
   - Motivators – what does s/he not like, want in her life
   - Strengths – strong points s/he has
   - Barriers – what is standing in her/his way
   - Resources --- what outside supports does s/he have

3. Add your observations to the information the client gives. Examples: Do you see any additional possible motivators?
   - What additional strengths do you see?
   - What additional barriers can you identify?
   - What additional resources could be present?

4. Decide what sections of the form you think you should focus on and what would be a good starting place. Don’t just start on page 1 and go through the form page by page.

5. Plan the questions you will ask. Plan questions that will be open and that will get client thinking. Avoid questions that repeat what is already on the form. See sample questions on pages 7-10.
   Examples:
   **Poor Question:** I see that you wrote that everyone will support you. Good.
   **Better Question:** Who are the specific people that you think will support you? What help will these people give you?

   **Poor Question:** I notice that you worked as a waitress for a year.
   **Better Question:** When you were a waitress, walk through everything you did on a typical day.

6. Make sure the participant has a copy of the Self-Assessment form she can use during the interview.
**Step 1: Greeting and Introduction**

Greet the participant with a handshake and a smile. Thank her for coming today.

Sample Introduction: *Good morning, Sandra. Thank you for coming today. I appreciate you taking the time to meet with me. I am________, a Case Manager with DHS. You and I will be working together to plan how to reach some of the goals you have.*

**Step 2: Explain purpose of meeting.**

Example: *Today you and I will work on getting a picture of where you are now. I will ask you questions so we can look at your goals, strengths, and any problems we need to work on. Then we will use what we learned to figure out how to get started.*

**Step 3: Using the Self-Assessment 7823**

Use the Self-Assessment to structure your interview and to ask questions that will help the participant think about where she is now. Use it to guide you, but do not allow the form to drive the interview.

- Ask the participant to look at the Assessment with you. Thank her for taking the time to complete it.

- Have the participant do an overview of the Guide with you.

  *Example: To get a picture of where you are now, we will look at different parts of your life – Family, Work Experience, Education, Health, Finances, Goals, Strengths, Problems we need to work on, and the Help you need.*

- Ask the participant what she learned about herself by doing the Self-Assessment.

- Ask the participant what section she would like to start with. If she has no preference, you can choose the starting place you planned.

- Ask open questions that will help her think about where she is now. (See Assessment Questions for ideas.)

- Make notes on the form using the words she gives you rather than your words.

- Ask her to make notes for herself during the conversation.

- Complete the assessment guide before discussing resources. If the participant asks about a resource during the assessment, ask her to make a note on her Guide. You can let her know we can discuss the issue once we start working on her plan.

- Praise any accomplishments or strengths you see or hear her mention.
Keep your attention focused on listening to the participant and asking thinking questions. You can make some notes, but avoid focusing on paperwork now.

Step 4: Summarize the Assessment

This summary can help you and the participants put the pieces together and see the picture of where the participant is now.

Example: Let’s see what we have learned about you.
- You have identified things you don’t like about your life now. Ask participant to repeat what she checked on the What I Don’t like about My Life List.
- You have set goals for how you want your life to be. Ask participant to state the goals she has from the What I Want in My Life list.
- You have many strengths. Ask here to read the strengths list. Add any strengths the two of you discussed in the interview. Ask the client to add these to her strengths list.
- You have accomplished a great deal. Ask participant to talk again about things she has accomplished. If she can’t think of anything, you can mention such things as finishing school, starting training, taking care of kids, doing volunteer work, etc.
- You have help and support. Ask her to talk about who she has gotten to help her.
- You know what problems you have to work on. Have her list the problems she identified.
- You know what help you need. Ask her to talk again about the help she needs.

When you have completed the questions on the Self-Assessment Form, ask if there are any other issues she has that have not been discussed so far.

Praise the participant for her strengths and accomplishments.

Summary: We are going to use the information you and I have discussed to build a plan to help you get from you are now and move toward the goals you want.
Step 5: Building A Plan

- Let’s look at making a plan. This plan is what you will do to work on what you want in your life for you and your family.

Goal Setting
A Self-Sufficiency Plan should help participants develop and work on goals that will help them accomplish the goals they set in the What I Want in My Life section. Examples of self-sufficiency goals: get a job, go to school, get child support, enroll in drug treatment, etc.

- If the participant has a goal, praise her for having given some thought to this. If the goal is a self-sufficiency goal, you can begin the planning process.

- If the participant cannot think of a goal, suggest some options for her to consider:
  - Job Search
  - Volunteer/Unpaid Work
  - Volunteer Work Experience
  - GED Classes
  - Vocational Training
  - Drug Treatment

- Sometimes participants will name goals that are not work or school related. You want to recognize their efforts to get started, but you also want them to begin to think more broadly about self-sufficiency.
  Example: Participant says goal is to get an apartment. You can say: That is a great goal. But you also mentioned that you want to buy things for the kids, get a car, be more independent of your family and be free of the welfare rules. Let’s think about a goal that will help you do all of those things.

You can then suggest the options above as goals that will help her get to the things she wants in her life.

- Once the participant has decided on a goal, have her write it on the plan. You can have her strike through the old goal and write the new one.

- Ask her what she thinks about setting a target date for accomplishing the goal.
  Example: Is this a goal that you think can be accomplished in 3 months or, 6 months? Ask her to put a date that is 3 or 6 months from today’s date.

- If she sets a time frame more than six months, ask: How do you feel about waiting a year to get started on those things you said you wanted in your life?
Action Steps
- The next step is to develop action steps. Help the participant develop a specific to do list.
  Examples:
  Vague action step: start looking for work.
  Specific action steps: put in applications, redo resume, attend job search class, get child care, and talk to people I know about jobs

- Ask participant to tell you the time table she has set for each action step. Have her estimate the hours she will spend on each step and total the number of hours. Praise her for commitment to her goals.
  Example: When do you think you can get this done?

- Ask participant to describe what help she can get. Ask her to be specific about the help she can expect.
  Example:
  Case Manager: You indicated that your mom can help with child care. What specifically can you count on her to do? Have you discussed this with her?
  If participant has not discussed this with her mom, ask her to put that on her action step list.

DHS Support Services
- Discussion of resources should occur during the planning process and not during the assessment phase. Make a note of resources you want to discuss, but wait to discuss them during the planning phase.

- Focus your resources on participant plans that will increase their self-sufficiency. You want to use your resources to support activities that will help them support themselves after welfare is gone.
  Examples: child care to support work and/or school transportation to get child support order to increase income.

- Don't overwhelm the participant with too many resources at once. Target your resources to activities that support the self-sufficiency plan.

- Describe your support as a partnership between the two of you.
  Example: You and I will work together to get the help you need to make this plan work.

- Praise examples of her resourcefulness. You have done a great job of getting help from your mom even when it was difficult. I am confident you and I can find ways to make this work.

- Ask participants for their resources before offering yours.
  Example: Participant checks transportation allowance. You can say: Who do you know who could help with a ride? If she names someone, you can talk about your transportation allowance as back up support.
  Example: That’s great that your boyfriend can help. We can help with some gas money.
Step 7: Commitment to the Plan

- Ask the participant to review with you by saying aloud the plan she made. Praise her for the good work she did.

- Ask the participant how she feels about the plan she has made. What concerns does she have about making it work? Problem solve with her how to address these concerns.

- Ask participant to sign the plan as a symbol of her commitment to work on her goals. Ask her if there is a place she keeps things she wants to remember to do. Ask if she will put the plan up where she can see it.

Closing

- Thank her for coming today and let her know you look forward to working with her. Give her your business card

- Ask if she would mind calling you as she gets things done. Tell her you would love to hear about her successes and help her work through any problems that arise. OR You can say I know you will be busy with your plan. Would it be okay if I checked in with you from time to time? Ask for the best time and day to call.

- Schedule a follow up meeting.

- Send a letter after the session. (Sample on page 220 in Handbook)
SAMPLE ASSESSMENT QUESTIONS

These questions are designed to prompt your thinking so you can develop other good questions.

Your Family

1. Who could help you with the person you are caring for? How does the help you provide for this person affect your ability to work?
2. What help would these people provide?
3. What would this person say or do to discourage you from working?
4. How would your children feel about your working?
5. What would other family members say about your working?
6. What things do you do now for your children and family that would have to change when you go to work?

Your Work Experience

1. Describe all the things you did on this job in a typical day.
2. What did you do well on this job?
3. What helped you keep this job?
4. Who helped you with childcare, transportation, work expenses?
5. What have you done to solve the problems you had on this job?
6. What would this employer say about you?
7. What people from your past jobs could you contact about job leads?
8. Of the jobs you have had, which ones would you do or not do again?
9. What did you learn from each job you had?
10. What did you like about having a job? What was difficult about working?

More Work Experience

1. Describe the things you did to earn extra money. How did you get started doing this?
2. Who do you know from this job that could help you find work?
3. Describe what you did when you helped at kids’ school, church, etc.
4. How did you get involved with this activity?
5. Who do you know from your volunteering that could help you find work?
6. For the people you have helped: What help would they give you for work?
7. How would your helping them affect your working?
Your Education

1. How do you feel about the amount of education you have?
2. What helped you get that far in school?
3. What problems has your education caused you in finding a job?
4. What were you good at in school?
5. Who do you know from school that could help you find work?
6. Schooling beyond high school: What made you decide to further your education?
7. Who helped you with school?
8. What did you do to make completing school successful?
9. What would it take to turn your hobby into extra income?

Your Health

1. What is it you cannot do because of your health problems?
2. What are you able to do in spite of your health problems?
3. What does your doctor say you could do to make your health problem more manageable?
4. What have you learned about dealing with this problem?

Your Finances

1. What do you do well to manage the money you have now?
2. What can’t you do for you and your children because of the income you have now?
3. What have you done to solve this financial problem? What would it take to make this better?
4. How will this problem keep you from finding a job?

Your Goals

What I Don’t Like About My Life

1. What bothers you most about where you live now?
2. What can’t you buy for yourself that you would really like to have?
3. How do you feel when you can’t buy things your children want?
4. What problems is the car you have causing you?
5. What is difficult about not having a car of your own?
6. What do you dislike most about using public assistance?
7. Talk about how it feels to have others controlling your life.
8. What bothers you most about depending on friends and relatives?
9. What is the problem with where you have to shop?
10. What bothers you about not being able to go on a nice vacation?
11. How do you feel when you can’t help people who have helped you?
12. How do you feel when people look down on you for being on welfare?
What I Would Like to Have In My Life

1. Describe where you would like to live.
2. What would you buy for yourself that you can’t buy now?
3. How would you spend your money if you could spend it the way you want to?
4. If you were more independent of family and friends, what could you do that you can’t do now?
5. Tell me about the furniture you would buy if you could have what you want.
6. Where would you go on a vacation for you?
7. Where would you take your kids?
8. If you would free of welfare rules, what would be better about your life?
9. What help would you like to give the people who have helped you?

Strengths

1. What have you done to help friends, family or neighbors?
2. Who would watch your children while you look for work? How do you get them to help you?
3. What did you do so you could finish high school or GED?
4. What did you do to get yourself enrolled in school or training?
5. Who would help you with a ride to school or work? How do you get them to help you?
6. What do you do to stay in good health?
7. What is good about having the kids in school or day care?
8. What do you do to keep your children in good health?
9. Who do you know that could help you find work? How could you ask them for help?
10. What do you do for your church, kids’ school, or community that you are proud of?
11. What good things do other people have to say about you?
12. What help could you get from family and friends? How do you get them to help you?
13. What support could you get from your boyfriend or spouse? How do you get him/her to help you?
14. What problems have you overcome? How did you do this?
15. What kinds of problems are you good at solving?
16. What would you say to an employer to show that you would be a good employee?
Problems to Solve

1. Of the problems you have mentioned, tell me which one you think you need to work on first, second, third, etc.
2. How does this problem affect your ability to work on your goals?
3. What have you done so far to work on this problem?
4. What do you think you could do to solve the problems you see as standing in your way?
5. When you have had a problem in the past, what did you do to work on it?
6. Who do you know that could help with each of these problems? How could you ask them for help?
7. What do you think would make it difficult to get started working on this problem?

What Help Do You Need

1. You have named several things you need help with. Where do you think we should start?
2. Let’s make a list of all the people you know who can help you with each of these.
3. What were you planning to do that would involve childcare/transportation help from us?
4. What do you know about help available for this problem? How would you feel about getting help with this?
## Assessment Pre-Interview Guide

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Assessment Interview Plan

Use the information from the Self-Assessment to plan your interview.

I. What I want as Outcomes

II. Introduction – How I will Introduce the Assessment

III. Sections of the Self-Assessment for Discussion

IV. Questions I Want to Ask to Get Client Thinking

V. Program Activities for Discussion

V. Resources to Discuss