<table>
<thead>
<tr>
<th>Topic Area(s)</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Identifying Motivators &amp; Practicing Re-engagement</td>
</tr>
<tr>
<td>Last Revised</td>
<td>7/6/07</td>
</tr>
<tr>
<td>Time Required</td>
<td>Approximately 1 ½ hours</td>
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<tr>
<td>Purpose</td>
<td>To model and practice identifying client motivators, strengths and resources when working on re-engagement, What we don’t like (miseries), what we want (goals), and what we will do (to accomplish our goals). Also to practice redirecting when the conversation goes off track.</td>
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<tr>
<td>Audience</td>
<td>DHS staff and partners</td>
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<tr>
<td>Method</td>
<td>Instructor role play, small group role play</td>
</tr>
<tr>
<td>Materials</td>
<td>One 7823 for instructor role play and additional 7823 for each small group with identifying information changed or deleted. Group Role Play Instructions Motivation and Change Handout Practice Session Surveys Participant copies of Making Case Management Workbook or copies of Johnny Case Study and Questions, page 26-27 of Making Case Management Work Workbook or use copies of handout (see end of this guide)</td>
</tr>
<tr>
<td>Pre-Class Preparation:</td>
<td>Make copies of Sample 7823’s for instructor role play and small group role plays. Ideally, choose some realistic client 7823’s and remove or change all identifying information. Make Copies of Small Group Role Play Instructions (one for each group) Make Copies of Motivation and Change Handout Practice Session Surveys If necessary copies of Johnny Case Study and Questions Handout or pages 26-27 of Making Case Management Work Workbook</td>
</tr>
<tr>
<td>Special Considerations</td>
<td>Consider using the same 7823’s in future sessions which allows class to become familiar with the details of the 7823 for the hypothetical clients used for the role plays, particularly the client used for the instructor role play.</td>
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</table>
1. **Recap and Introduction (10 min)**

Welcome back. Review last practice session topics and ask, “Who was able to expand their use of _______ over the past month? How was that?”

This month, we are going to look at what motivates our clients and how we can use that to help them move forward. When working with participants, our role is to help them to get ready for and to manage change. To help influence change, we should try to impact three factors in the lives of our clients:

- **Motivation**…these are the forces ~ positive and negative ~ that move people out of their comfort zone and into trying the unknown.
- **Skills**…their ability to do things that will make change happen.
- **Resources**…the supports that make change more achievable.

Motivation to change can be positive ~ what people want badly enough to change, or it can be negative ~ what people don’t like about their present situation, or what is making them uncomfortable. Change is more likely to be initiated by negative motivators than by positive ones. The process of change generally occurs in three stages:

1) we identify what we **don’t like** about our present situation (what sucks)
2) we define what we **want** in our lives (goals)
3) we decide what we **will do** to accomplish the goals (make a plan)

These changes don’t always occur automatically. People may get stuck in one stage and not move on to the next. Our role, as change agents, is to try to help participants move through each stage as quickly as possible. We can impact this by helping them see three things:

1) See the need to change
2) Believe they can change
3) Know that help is available

We are going to look at a case study and see how we can identify motivators from what our clients are telling us.
2. **Large Group Activity (15 min)**
   As a large group, complete the Case Study for Johnny Sparks from page 26 and 27 from the Dr. Ford workbook. Hand out copies of the case study for the group to refer to as they are answering the questions. Read the case study to practice identifying motivation that he may possess. Ask the group to provide two or three answers to each of the questions on pages 26 and 27. The facilitator will write their answers on a chart pack at the front of the room.

3. **Role play Demonstration with Narrator (20 min)**
   This will be a 3-part role play demonstration conducted by the facilitators for the participants to observe.
   - Part 1 will consist of a Case Manager and a client working from the 7823 to identify motivators. (5 min)
   - Part 2 will consist of the CM staffing the same client with her supervisor who will demonstrate “old” vs. “new” processes of addressing client non-participation.
   - Part 3 will consist of the CM and the client meeting again to address re-engagement.

   The narrator will interrupt on occasion to ask the audience what is going well, what could be done differently, do they have any suggestions of things that they would say, etc?
   At the end of the role play, some mention should be made about how the CM was able to redirect the conversation when the client was unable to stay on task, or took the conversation on a tangent. We will let people know that we will be spending more time on that topic in our next session.

4. **Small Group Activity (35 min)**
   Have the large group count off 1-4 and gather in their respective groups. Hand out instructions (See end of this guide) and sample 7823’s for the small groups to do two role plays within their small groups:
   - First role play will be a CM and a client identifying the client’s motivators (10 min prep, 5 min role play)
   - Second role play will be a CM and a client working on re-engagement (10 min prep, 5 min role play)
   Small groups will role play only within their small groups.

5. **Small Group Role Play Demonstration (5 min)**
   We will ask for one group to volunteer to perform their second role play in front of the larger group.

6. **Wrap Up and Evaluation (5 min)**
Distribute Motivation and Change Handout and Practice Session Survey forms.

The key principle of the Making Case Management Work approach is that people are able to make changes in their lives when they are motivated to do so. This is true of all of us (did you ever try to accomplish a task when you were not clear what was in it for you?). When we help our clients find out what motivates them, we are helping the client gain control over their lives. We are also reducing our own stress, because we are no longer in charge of motivating them through warnings, conciliations or pointing out their past mistakes. Did that even work? No, it didn’t, and it caused us lots of unnecessary bother. So the purpose of the new My Self Assessment (7823) and My Case Plan forms and our new Case Management approach is to help clients put their motivation and their strengths into words, so we can use this to help focus and re-focus them on these goals. Also, we should remember that we may think this goal setting process is routine, but for the client it may be the first time they have been asked to really think about goals and motivators. We may be the first ones to encourage them to "dream" about what they can do. We have an opportunity to do something really important for the people we come in contact with and we shouldn’t underestimate the impact of our encouragement and support.

As we learned from Beverly Ford this month, another method that’s very effective is to have clients work on their motivators in groups, because peer feedback and support is much more powerful and influential than when it comes from DHS staff.

Since finding and using motivators is such an important skill, we will continue to practice to do this in our upcoming sessions.
Case Study on Johnny Sparks – Identifying Motivators
From Making Case Management Work Page 26-27

Johnny, age 27, is on parole after serving three years in prison for selling drugs. He recently completed a drug rehab program. He dropped out of high school in the 11\textsuperscript{th} grade. He went to Job Corps, but left after six months without completing the program. Johnny also enrolled in a job-training program, but did not complete it. Johnny has worked in construction and maintenance.

He lives off and on with his sister and a girlfriend. He has a 7-year-old son whom he sees regularly. Johnny says he has been looking for work for a month without success.

1. What are the negative motivators that could make Johnny uncomfortable enough to change?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. What are the positive motivators that could push him to want to change?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. What strengths does Johnny bring with him that could make change possible?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

4. What barriers does he have that could make change difficult?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

5. What strengths could help compensate for or offset his barriers?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
6. What are possible sources of success in Johnny’s life?

7. What resources can you make available to support Johnny in making change?
Small Group Role Plays Instructions

Small Group will demonstrate the use of open and follow up questions in a small group role play.

- Choose someone to play the role of client and someone else to play the role of the Case Manager.
- Review the 7823 and pay particular attention to the “Things I don’t like in my life” and “Things I would like in my life” sections.

1\textsuperscript{st} Role Play (10 minutes prep, 5 min. role play)
- CM and client identifying client’s motivators (Things I don’t like and Things I want).

2\textsuperscript{nd} Role Play (10 minutes prep, 5 minute role play)
- CM uses motivators to re-engage client.
MOTIVATION & CHANGE
(from Making Case Management Work Workbook Ch. 2)

The Case Manager’s Role is to help clients to:

1. **See the need to change** (help client explore what they don’t like about their life now, and why they would strive to make changes)
2. **Believe they can change** (help client see their strengths, and how these strengths can help them overcome their barriers)
3. **Know that help is available** (help client see supports are available, including JOBS/financial, but also encouragement and problem-solving)

Motivation = internal force than pushes client out of “comfort zone”

**How to find motivation:**

- Review the data to find a desire to change (My Self Assessment, TRACS)
- Make a list of possible motivators (from Things I Don’t/Would Like)
- Use list of motivators to structure client interview (plan questions to ask)
- Ask about what client does not like and would want in their life
- Start with client’s current motivations (not what we wish motivated them)
- Acknowledge that change is difficult (it can be scary to try new things)
- Acknowledge client’s feelings about change (negative feelings are normal)
- Ask open questions (ask client to do the thinking, use feeling questions)
- Listen for complaints & restate complains as goals

### Transforming complaints into goals:

<table>
<thead>
<tr>
<th>COMPLAINTS</th>
<th>GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don’t like relatives telling me what to do</td>
<td>Make my own decisions</td>
</tr>
<tr>
<td>Not having a car</td>
<td>Have my own car</td>
</tr>
<tr>
<td>I’m being treated like a child</td>
<td>Be treated with respect</td>
</tr>
<tr>
<td>I can’t buy things my children need</td>
<td>Buy things we need; get a computer</td>
</tr>
<tr>
<td>I always have to ask others for help</td>
<td>Do more things for myself</td>
</tr>
</tbody>
</table>
Practice Session Survey

1. What part(s) of today’s session do you think will be the most valuable to the work that you do?

2. What types of activities are most helpful to you at the sessions (i.e role playing, worksheets, lecture, small or large group, etc)?

Name (Optional) ________________________       Branch ____________