



Oregon WIC Listens – Continuing Education: *Completing the Full Assessment before Providing Education*

Time: 30 minutes

Materials:

1. *What We've Talked About in WIC Today* (Circle Chart)
2. *Counseling Observation Guide*

Note – both of these materials can be located on the Oregon WIC Listens website:
www.oregon.gov/DHS/ph/wic/orwl.shtml.

Objective:

1. Staff will be able to identify the advantages of completing a full assessment before providing education.
2. Staff will be able to identify useful strategies that will facilitate completing a full assessment before providing education.
3. Staff will be able to monitor the amount of education they are providing prior to completing a full assessment.

Instructions:

1. Briefly review the information included in the **Content** section of this CE with staff.
2. Conduct a facilitated discussion with staff using the **Sample Questions** from the **Facilitated Discussion Guide** section in this CE.
3. Provide time for staff to practice completing a full assessment before providing education.

Introduction:

For a nutrition education program like WIC, whose focus is on participant centered services, it is critical that we have a full picture of the participant's needs and concerns **before** providing any education. Obtaining a full assessment prior to educating allows us to prioritize the participant's identified needs and concerns.

Content:

There are many advantages to completing a full assessment before educating. These include:

- ❖ Efficient use of time by focusing on the highest priority issues
- ❖ Helpful to “correct” misinformation 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

Often times during a certification, a participant will ask a direct question or provide a natural opening to provide education before the assessment is complete. This poses a challenge to the certifier, who may be immediately tempted to jump into educator mode. Of course we want to be sure that the participant knows they have been heard and not feel put off, but ideally we want to wait to educate until the full assessment is complete. Below are several strategies that may be helpful for you to consider when completing a full assessment before educating.

Strategies:

Set the agenda:

- Let the participant know upfront that you be doing things a bit differently, i.e. *“We are making a change in how we provide nutrition education so I’d like to start by asking a few questions.”*

If asked a direct question:

- Acknowledge the question
- Make a note on a circle chart, route slip, or other form and assure the participant that you will come back to it
- Ask permission to finish with assessment
- Redirect the question if it takes the conversation off track by summarizing and then returning to the focus of discussion.
- *“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?”*

Summarize and prioritize at the end of the assessment:

- Summarize the assessment by referring back to your notes
- Prioritize participant’s concerns
- Provide education on prioritized needs and 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

Remember ~ participant centered encounters provide **at least 50% of the talk time for the participant.**

Facilitated Discussion Guide/Sample Questions:

1. Tell me about your experiences with waiting to educate until the full assessment is complete.
2. What are some of the challenges you have experienced while attempting to conduct a full assessment before educating?

3. What could be the disadvantages of providing education to a participant before completing a full assessment?
4. What advantages can you think of for waiting to educate until the full assessment is complete?
5. What are some strategies that have worked well to keep you from educating before the full assessment is complete?
6. Can you think of any other strategies that might be effective?
7. How do you think a certification would feel if you were to use some of the strategies discussed here?

Practice Activities:

As a group, talk about the different options to practice waiting to educate until after the full assessment has been completed. Choose 1 to try over the next couple of weeks.

1. **Check yourself** - Now is your opportunity to begin observing yourself! Try to begin to notice the various topics you discuss during your certifications. 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 keep track of the topics you discuss during a certification, begin to observe the timing of these discussions. Are you waiting until the full assessment is complete? You may find it helpful to keep track of the topics you discuss with a participant. Feel free to record the topics discussed throughout your certifications, so you can reflect back afterwards.

2. **Circle chart** – The circle chart is a tool for use by certifiers to keep track of the various topics that are mentioned throughout a certification. Any topic that could be the focus of the education could be recorded on the chart. After completing the assessment, you can review the topics you have recorded on the chart with the participant to see which area they are most interested in discussing. At the end of the appointment, take a look at the circle chart and think about when or how you addressed the questions from the participant.

2. **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 the certifier waits to educate until the assessment is complete, or if your co-worker is educating before the assessment, record the topics discussed so you can share these observations. Now it is their turn to observe you. Having a quick conversation with your co-worker after the certifications are complete will help both of you continue to develop your participant centered skills.