



**Engaging TANF Clients: Comprehensive Strategies and Approaches to  
Successfully Engaging and Work with TANF Clients to Achieve  
Successful Outcomes** Jodie Sue Kelly [cygnetassociates.com](http://cygnetassociates.com)

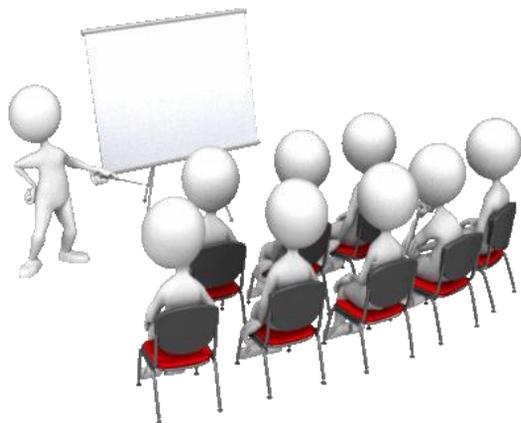




### Energy-Draining Motivation-Killing Orientation

- Fill Out Paperwork as Applicants Enter
- Staff Introductions
- Mission of the Organization
- History of the Organization
- Eligibility Requirements:
  - Income
  - Barriers
  - Residency Requirements
- Review of Calendar of Training Workshops
- Rules at the Center (dress, smoking, etc.)
- A review of the various staff and their roles
- Steps in the Process
- Big Ending: Let's take the CASAS/TABE.
- Questions?

## Sample from Somewhere: TANF Introduction



### Who is (TANF Provider) (Name of Program)?

- ▶ *“Helping Government Serve the People”*
- ▶ TANF Provider (Name of Program) is a for profit business contracted by the State of X, Division of Public Assistance to provide case management services for recipients of TANF cash benefits
- ▶ TANF Provider has the responsibility to follow State and Federal guidelines that govern the Any State TANF Program.
- ▶ TANF Provider Staff are dedicated to assisting families in working toward their employment goals and continues assisting even after families reach self-sufficiency if you meet criteria



## What are you required to do to receive temporary cash assistance?

### Anyone receiving TANF is required to:

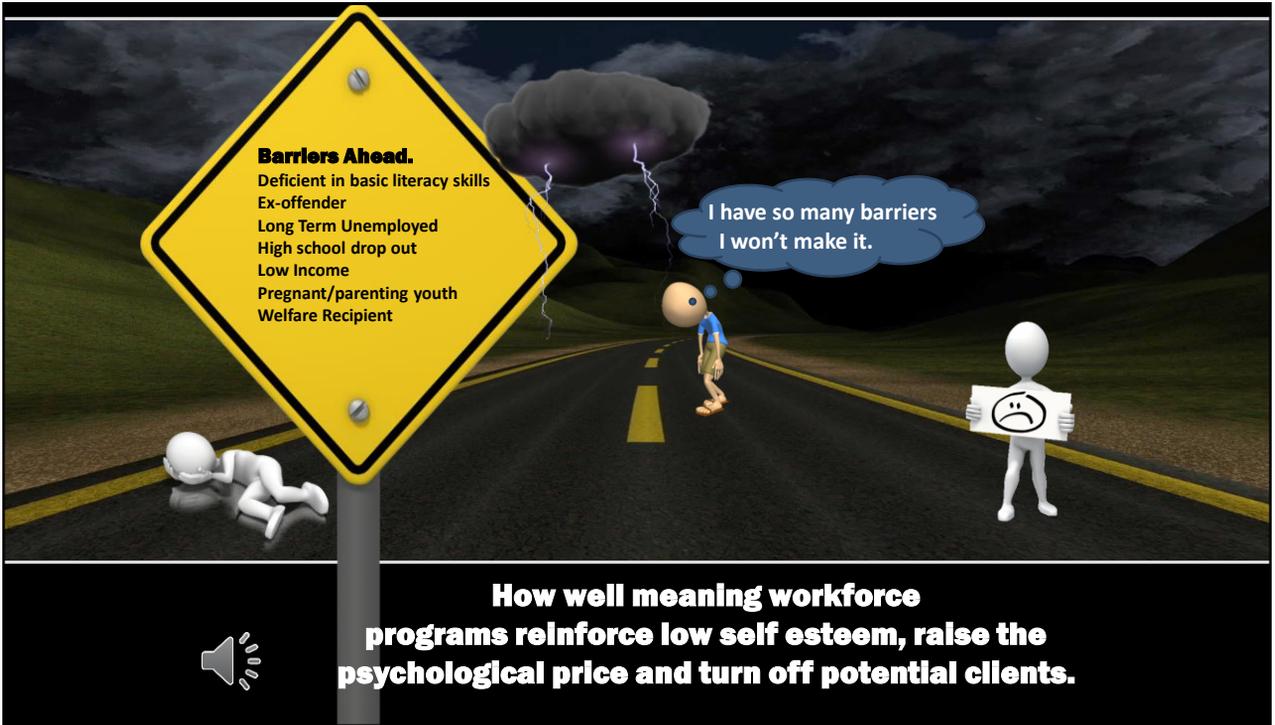
- ▶ Follow all rules and regulations of the program so that you can qualify for the maximum benefit amount
- ▶ Participate in 40 hours per week of approved work activities to gain and maintain employment and self-sufficiency
- ▶ Submit required documentation to verify participation in work activities as outlined on your individual Family Self-Sufficiency Plan
- ▶ Report any changes in household composition, living situation, expenses or income to DPA and to your TANF Provider Case Manager within 5 days of the date of change

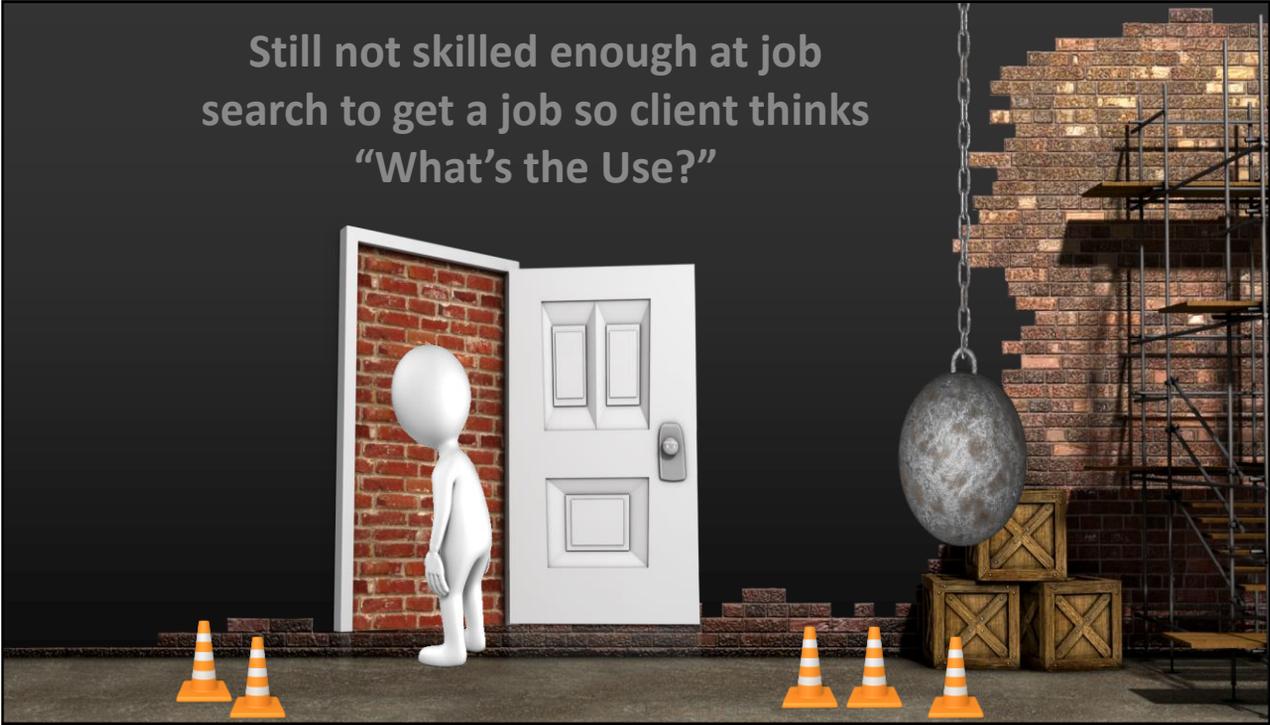


## What are Work Activity Requirements?

Readability Formula	Grade
<u>Flesch-Kincaid Grade Level</u>	15.2
<u>Gunning-Fog Score</u>	16.1
<u>Coleman-Liau Index</u>	19.8
<u>SMOG Index</u>	13.9
<u>Automated Readability Index</u>	16.1
<u>Average Grade Level</u>	16.2

- ▶ Approved Work Activities have been determined by State and Federal regulations, and all activity must be verified by approved documentation
- ▶ Some examples of approved work activities are: Supervised Work Search, Job Development Activities and Paid Employment
- ▶ Some examples of approved verification of activities are: paystubs, homework logs, and signed activity logs if participating in other approved work search/learning activities
- ▶ Work Activities are assigned based on individual employment goals and steps needed to reach those goals
- ▶ Discuss specific work activities you participate in and the verification needed with your Employment Advocate







“We have a participation problem.  
Where do I find the solution?”



## Power Tools

- COERCE
- THREATEN
- FIAT
- PUNISH
- SANCTION
- BROW BEAT
- STRONG ARM
- INTIMIDATE
- COMMAND
- COMPEL
- PRESSURE
- DOMINATE
- DEMAND



# Motivational Strategies

- Inspire
- Persuade
- Reason
- Convince
- Boost
- Encourage
- Excite
- Fuel
- Spark
- Support

- Motivate
- Stimulate
- Spur
- Induce
- Invigorate
- Strengthen
- Energize
- Fire Up
- Rally
- Encourage



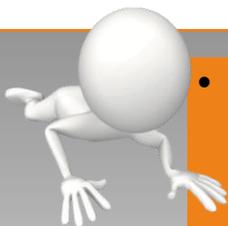
# Getting "Buy In"



**Over riding theme and system is built on "compliance".**

**Over riding theme and system is built on customer needs and positive outcomes from their points of view.**

## Developing Powerful Conversational Hooks



- **Need:** lack of something, unsolved problem
- **Features Tell:** is a fact, detail, or description of your services. It is a description of process.
- **Benefits Sell:** is the positive result your client gets as a result of working with you.



**Motivation is Tied to Outcomes/Benefits.**

**In your experience, which of the three most accurately depicts the motivation of the person applying for aide?**

I applied for Colorado Works because I was hoping to get an Individual Responsibility Plan.



I applied for Colorado Works because I want help becoming self sufficient.



I applied for Colorado Works because I need money.





**What's Your Theme?  
What Are You Selling?**

**Compliance**

**Short Term Messages**

- Get A Job
- Get Training
- Get Training and A Job

**Longer Term Messages**

- Self-Sufficiency
- Build a Career Pathway
- Career Advancement
- Income Improvement



## Messaging for Referral....

“Okay, your application to give you temporary help in the form of cash and food stamps has been approved. This will buy you some time as we work to provide a more secure financial solution to you and your children. I am going to (refer you) help you create a plan to improve your income without the need of cash aid and food stamps.”

**Tip: Start with the “theme” at the beginning – at referral.**

## Are We Using Motivational Phrasing that Builds Excitement Or Bureaucratic Terminology that Customers Don't Understand.

1. We have vocational training in a skill, trade or occupation.
2. We have skill training, job search workshops and academics.
3. You can get a GED and tutors to help you move through quickly.
4. We can offer you free tuition at some of the area's best schools.
5. You can earn some money while you complete your education.
6. You will catch up on your math and reading skills.
7. One thing you will learn here that can help cut your job search time is how to submit an online resume. You'll learn the tricks of how to successfully submit a resume that gets noticed.
8. We have placed more than 50 mandatory customers in jobs this year.
9. We have workshops on job search and career planning that you are required to attend.
10. With the right training, you can to work and get a higher salary than you might be able to earn otherwise.
11. Services to get you working and earning more than cash assistance will ever pay.
12. Get good skills that are in demand by local employers.

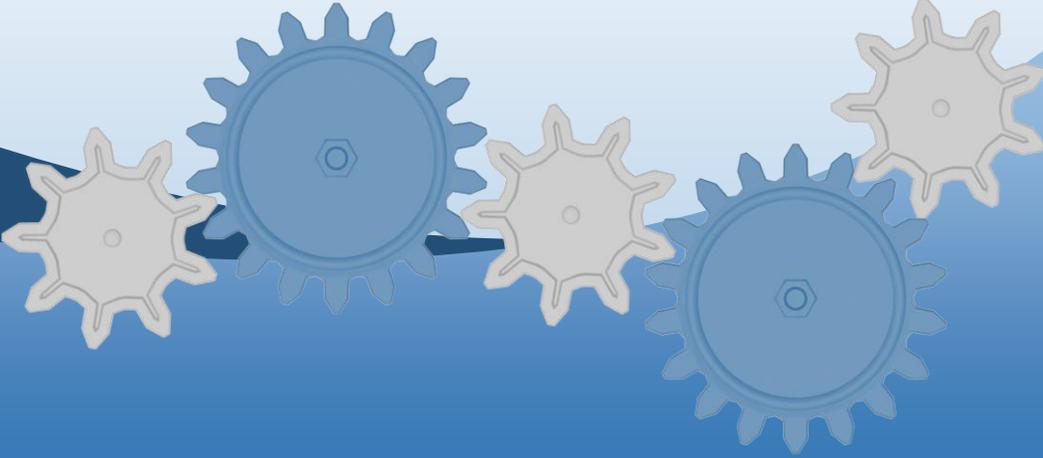
## Plenty of Challenges



A Tug of War with Misinformation That Impacts "Buy In."

**Build Orientation to:**

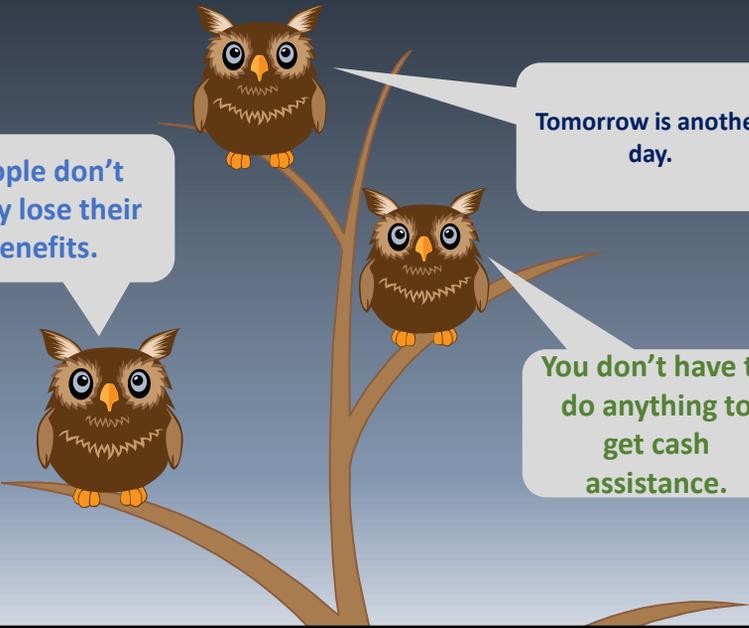
**Overcome Resistance,  
Build Motivation and Participation,  
Translate Complex Information into Every Day Concepts**



People don't really lose their benefits.

Tomorrow is another day.

You don't have to do anything to get cash assistance.

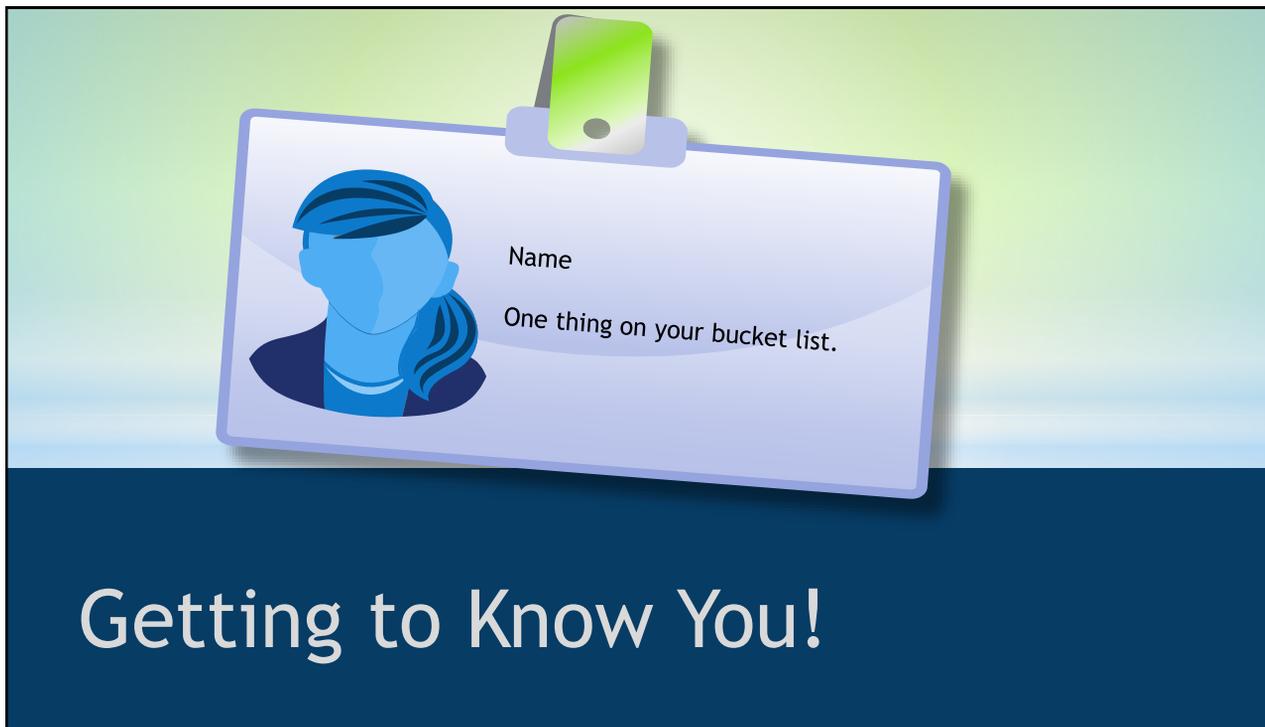




## Steps to Higher Income Welfare Transitions

### Order for Presentation:

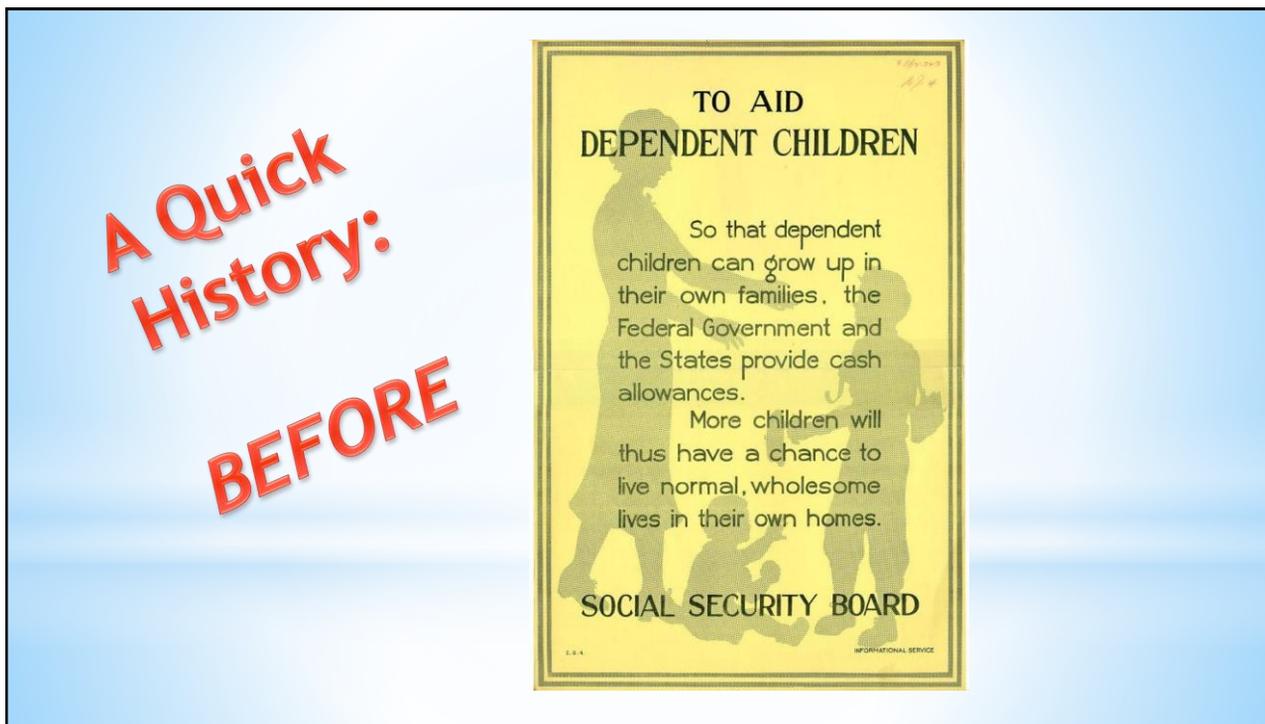
- Introductions
- Set the Ground Work
  - How Welfare Has Changed
  - Requirements to Help Self
  - Sense of Urgency: Time Limits
- How it is to Your Advantage to Participate
  - How cash assistance is stagnant
  - You are better off: Income from welfare versus income from working
  - Goal setting
  - What are all of the services you can get and how they can help?
- What happens if you don't participate?
- Rights and Responsibilities
- What is Next? What are the steps you will go through?



Name

One thing on your bucket list.

# Getting to Know You!



**A Quick History:**

**BEFORE**

**TO AID DEPENDENT CHILDREN**

So that dependent children can grow up in their own families, the Federal Government and the States provide cash allowances.

More children will thus have a chance to live normal, wholesome lives in their own homes.

**SOCIAL SECURITY BOARD**

U.S.A. INFORMATIONAL SERVICE

A Quick History:  
AFTER



\*Help Every Step of the Way!

A Quick History:  
AFTER



Cash to only those helping themselves



**\*Maximum AFDC and TANF Cash Benefits for a Family of Three By State**

	1981	1988	1996	2000	2005	2010	2012	2015	Difference	Years
Arizona	202	293	347	347	347	278	278	278	-\$15	28
California	506	663	596	626	723	694	638	704	+\$41/- \$19	28/11
Idaho	305	304	317	293	309	309	309	309	+\$4/+ \$5	35/28
Nevada	241	330	348	348	348	383	383	383	+\$53	28
New Mexico	220	264	389	439	389	447	380	380	-\$9	20
Oregon	321	412	460	460	460	485	506	506	+\$46	20
Washington	415	492	546	546	546	562	478	521	+\$29/- \$25	28/20

## Remembering back...1988

Item	1988	2016	Difference
Dozen Eggs			
Gallon of Milk			
Gallon of Gas			
Minimum Wage			
Postage Stamp			
Loaf of Bread			

TANF/Cash Assistance (family of 3)

1988:

2015:

## Difference Between Working and Cash Assistance

Monthly	Cash Aide	Working Full Time
Money earned per month		(\$___ per hour x 40 hours x 4)
Cash assistance	Enter the amount of your check:	(Income disregard:)
Food stamps	Enter the amount of your food stamps:	Enter estimate of food stamps
Child support payments	Enter the amount you get:	
Total monthly income:		

## 2016 Earned Income Tax Credit by Family Size

**The maximum amount of credit for Tax Year 2015 is:**

- \$6,269 with three or more qualifying children
- \$5,572 with two qualifying children
- \$3,373 with one qualifying child
- \$506 with no qualifying children



## The Real Difference In Earnings

	TANF	Full-Time Work
Annual total	____ previous TANF total x 12 ____ annual TANF	____ Earnings per month x 13 ____ Total
Value of state income disregards	0	(Monthly cash assistance received under disregard policy x 12) ____ Total
Estimate of food stamps		(Monthly food stamps x 12) ____ Total
Child support	(Multiply monthly child support pass through x 12) ____ Total	(Multiply monthly child support x 12) ____ Total
Earned income tax credit	0	____ Total
Child credit	0	____ Number eligible children x \$1,000 ____ Total
<b>Total annual income:</b>		
		Annual working income Total - Annual TANF income = ____ Difference in household income

## Set Life Goals: All Motivation Begins with a Goal



- It is useful to identify your goals and how you want your life to be once you are working. It will help you to stay motivated. Think and list five ways your life would be better if you had the higher level income you just calculated.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_



## Staying on Track

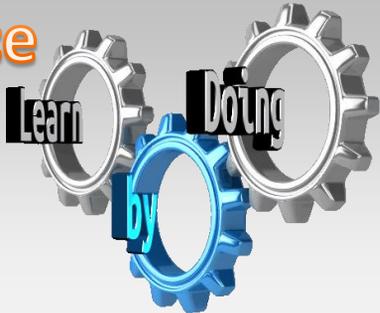




## What are your options?



## Do Work Experience



- ❖ Best for people who like to be active.
- ❖ You get a current work history.
- ❖ You learn new skills.
- ❖ You help the community.
  - ❖ You get back into the world of work.
  - ❖ You get a work reference.
  - ❖ Work at a Local Non-Profit/For Profit
    - ❖ Community Work Experience
    - ❖ Business Work Experience
    - ❖ On the Job Training



## Help Getting a Job



- ❖ Workshops That Help You Get Ready:
  - ❑ How to Negotiate Starting Salary
  - ❑ How to Pass the Dreaded Personality Test
  - ❑ How to Writing a Competitive Resume
  - ❑ How to Increase Hours, Get Pay Increases and Earn Promotions for More Money
  - ❑ How to Answer Difficult Interview Questions When You Have Red Flags in your Background
- ❖ Staff that Find Openings With You!
- ❖ A Fully Equipped Resource Room



## Work With Other Agencies and Resources to Plan for Your Success

- (Note: can you list a few of the agencies that help so they get the idea. Childcare? Legal Services? I am not sure what all you do. So do a quick add).



## Get Short Term Training

- (Note: Can you add some examples here of what types of short term training you offer.

For example:

- Truck Driving
- CNA Classes
- Etc.



## Complete Your GED or Earn a Degree!

☺ *Diplomas, Degrees and Certificates Can Increase Your Income* ☺



\*Penalties for Not Participating

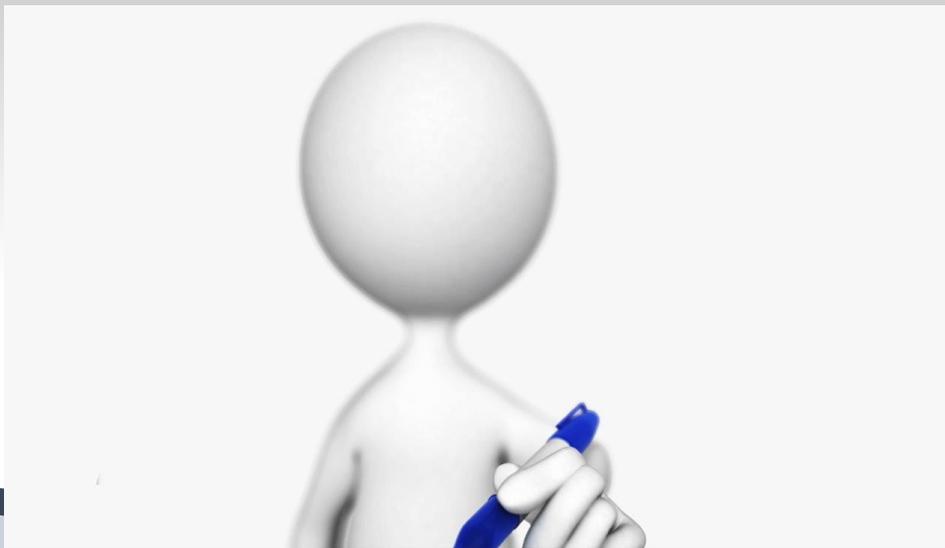


Level 1: If you choose not to do the activities you agreed to do or for the hours you need, then you lose cash for \_\_\_\_\_ or until you do the activities.

Level 2: If you still choose not to participate, then you lose cash for \_\_\_\_\_ or until you do the activities.

Level 3: If you still don't do the activities, then you lose cash for \_\_\_\_\_ or until you do the activities.

**What did you hear today that most interested you?**



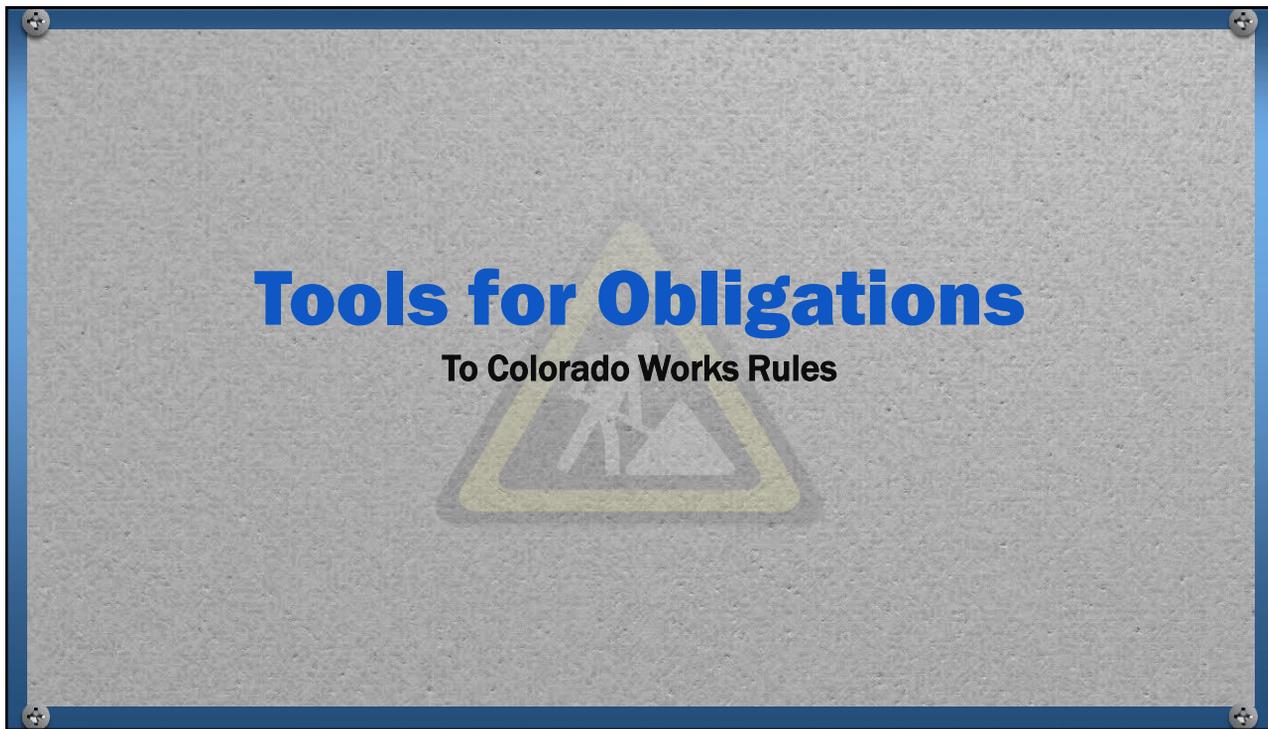


# Questions and Answers

## Candy Mania

- Payday
- 100 Grand
- Lifesaver
- Kiss
- Hug
- Smartie
- Dum Dum





**The Clock is Ticking**

Shelia Brooke's Time On Welfare to Work:  
**60 total-25=35 Remaining**

59	58	57	56	55	54	53	52	51	50
49	48	47	46	45	44	43	42	41	40
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0

# Save Your Months on Welfare to Work.

## Life is full of unknowns.



Shelia Brooke's Time On Welfare to Work:

59	58	57	56	55	54	53	52	51	50
49	48	47	46	45	44	43	42	41	40
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0



Shelia Brooke's Time On Welfare to Work:

59	58	57	56	55	54	53	52	51	50
49	48	47	46	45	44	43	42	41	40
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0



## Time Flies... Plan For Your Future Now.

\_\_\_\_\_. You must **discuss** with me the reason for this failure and arrange counseling **within 10 calendar days** or you may be sanctioned, which may cancel or reduce your temporary cash assistance and/or your food assistance benefits.

If the reason you did not comply with your assigned activity is because you need assistance, we may be able to help you. If we agree you need services for your situation, we will refer you for these services. For example, if you need childcare to comply with an assigned activity, we may be able to assist you with the needed childcare. You may also have another good reason why you did not comply.

**Good reasons for not complying with your assigned activity may include:**

•If you have one of the above, or another good cause reason, please let us know. You may be able to receive additional services or comply with other activities that fit your situation better. If you are working, you may be eligible for transitional services if your temporary cash assistance is cancelled. Transitional services include childcare, Medicaid, transportation, and education or training.

**If you do not personally discuss with me the reason for failure by %DATEPLUS10%, a level \_\_\_\_ sanction will be requested. Sanctions do not affect your Medicaid. IMPORTANT: If you have more than one failure without good cause within a 30 calendar day period, you will be sanctioned. The penalties for failing to comply with an assigned activity or comply with an alternate requirement plan are listed with this notice.**



## Tip: Review Your Reading Levels

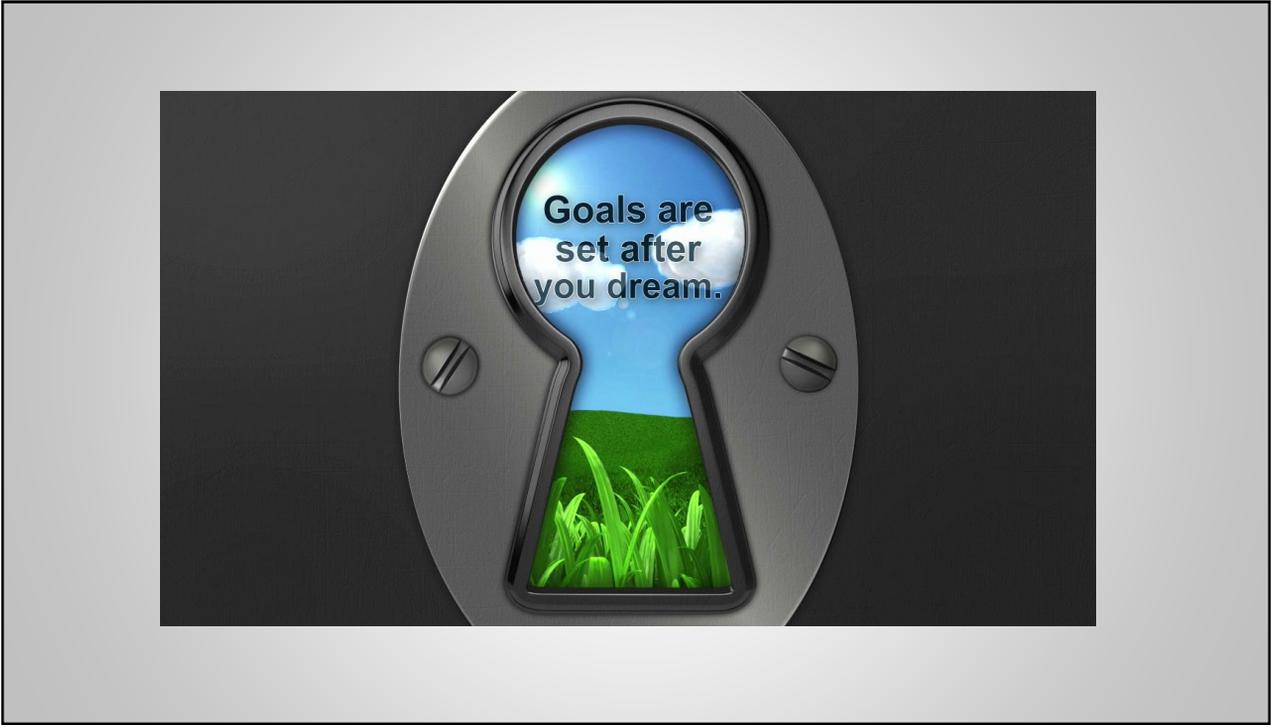
### A Reading Level Assessment of Materials Designed for Clients

Readability Formula	Grade
<a href="#">Flesch-Kincaid Grade Level</a>	10.3
<a href="#">Gunning-Fog Score</a>	13.1
<a href="#">Coleman-Liau Index</a>	12.1
<a href="#">SMOG Index</a>	9.7
<a href="#">Automated Readability Index</a>	10.7
<b>Average Grade Level</b>	<b>11.2</b>



<https://readability-score.com/>

### Simple Graphic Message



### Case Managers Help Customers Translate Dreams into Goals

#### Dreams

- Dreams you are just thinking about.
- Dreams can go on forever.
- Dreams are free.
- Dreams don't produce anything.
- Dreams are imaginary.
- Dreams never have to end.
- Dreams can inspire you.
- Dreams are easy. Everyone has a dream.
- Dreams can be drifting, ever-changing thoughts.
- Dreams just require your imagination.



#### Goals

- Goals are something you act on.
- Goals have deadlines.
- Goals have a cost (time, money, effort).
- Goals produce results.
- Goals are based in reality.
- Goals have a finish line.
- Goals change your life forever.
- Goals require hard work.
- Goals are specific and always on your mind
- Goals stretch your skills, abilities.



### Program Goals: Not Real Powerful



## Life Goals: Much More Powerful



### Place Your Bets

Joel: "I want a job. I will take just anything."

Marla: "I want to apply to and get accepted into nurse's training. With a nursing degree you can live and work anywhere. Nursing is a stable field and the country is short on nurses so I know I can get hired."

Connie: "I would maybe like to go to some type of school someday."

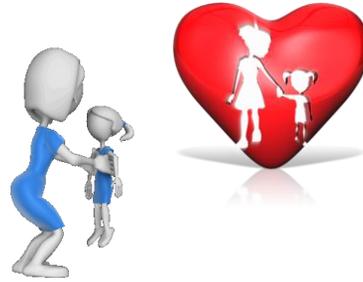
Addie: I want to get a job that allows us to live in one place and that lets me help provide for my family. I don't want to move anymore. I want the children to be able to go to one school, get a good education and have stability. I need to figure out where to start to make that happen.



**Inclusion of the dream is critical during on-going case management to continue motivation and change.**

**“You are taking some important steps toward making a better life for your children.”**

- You are in school, you are making good progress and only have 4 weeks left.
- I would like to talk about any steps you have taken since our last conversation and then to talk about what is next.
- How are you feeling about school right now?



**We assign negative labels to people and call them “barriers”.**

**Deficient in basic literacy skills  
Ex-offender  
Documented disability  
High school drop out  
Homeless/runaway  
Foster care  
Pregnant/parenting youth  
Needs additional assistance**



**You have some situations or challenges that need to be planned around.**

- Need help in reading and math
- Need help to find an employer who isn't concerned about a criminal record
- Need to plan around a learning, physical or mental disability
- Left school prior to graduation and so needs GED or diploma.
- Doesn't have a place to call “home” and is living with a foster family or in a shelter.
- Need to consider his or her baby as part of the plan for school or work.
- Need to provide other assistance getting into school or into a job.

**Start with the end goal.  
Then figure out how to get there.**



Attitudes of Too Many of Our Job Seekers.

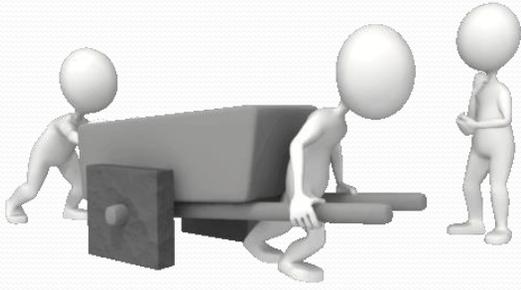
I want to go to school but I am not sure that I want to work.

I better be able to take time off when ever I want or I am out of there.

I would take this until I found something better.

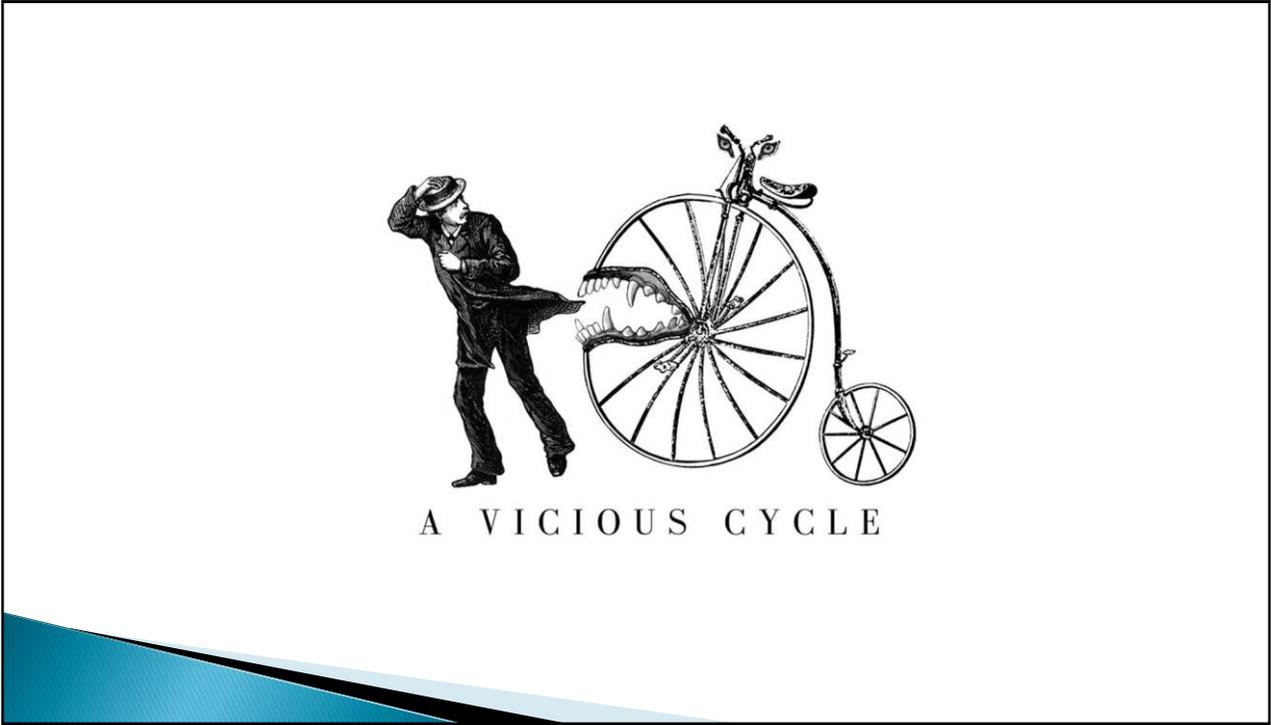


***It's a Heavy Lift to Sell Something That Doesn't Work.***

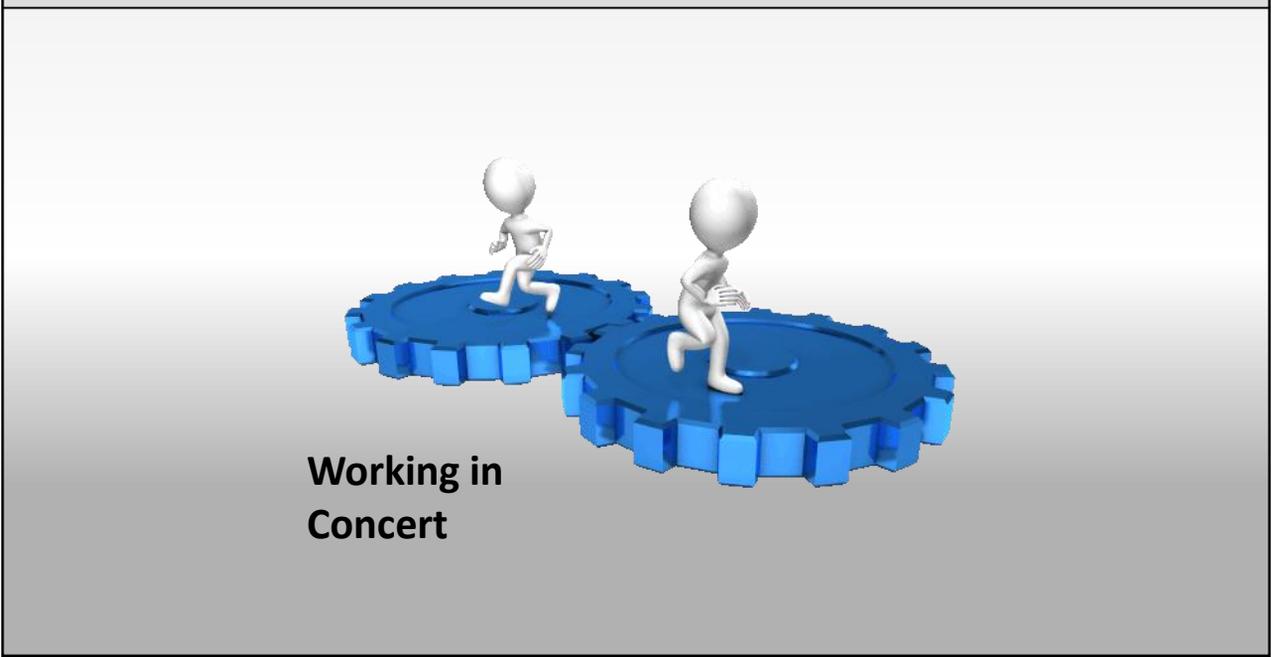


**Employer is Dissatisfied**





**Building a Foundation That Services Both Sets of Customers**





**What does it look like when someone is competitive for a job?**

**What are Minimum Standards customers should meet before you give them a Career Source seal of approval?**

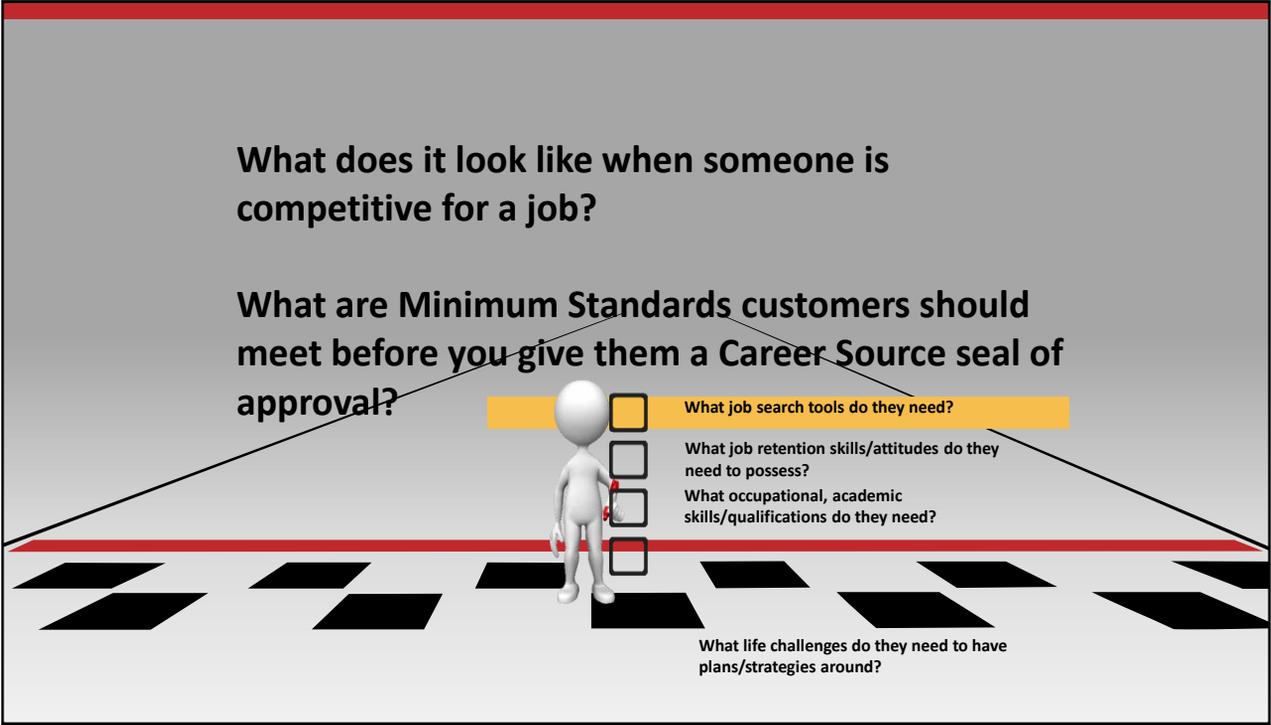


What job search tools do they need?

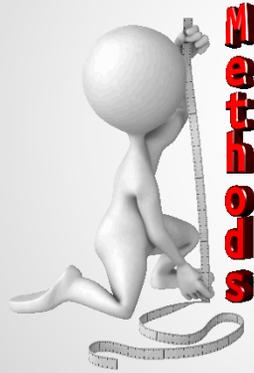
What job retention skills/attitudes do they need to possess?

What occupational, academic skills/qualifications do they need?

What life challenges do they need to have plans/strategies around?



## 4 Ways to Conduct Assessments or Gather What To Build Job/Retention Success



- Self-Assessment
- Observation
- Structured Interview
- Formal Assessments

### SELF ASSESSMENT

#### Job Search Tools

Yes No	Do you think your resume is competitive with other people submitting resumes for a job?	Yes No	Do you know how to answer difficult questions at a job interview?
Yes No	Do you know how to submit an online application?	Yes No	Do you have three professional references for a job?
Yes No	Do you have a cover letter that goes with your resume to submit for jobs?	Yes No	Do you know how to answer the “personality questions” asked on an online application?
Yes No	Do you have an email address for employers to use to contact you? If yes, what is it? _____	Yes No	Do you know what type of job you want to apply for?
Yes No	Do you have clothing that is appropriate to wear to a job interview?	Yes No	Employers will ask “why did you leave the job” on a job application? Are your answers positive?
Yes No	If an employer looked at your Facebook or other social media page, is there anything on it that you wouldn’t want a potential employer to see?	Yes No	Can you list 10 marketable skills to an employer during an interview?
Yes No	Do you know how to use the one stop job listing site, Indeed.com and SimplyHired.com?	Yes No	Do you have a contact phone number for employers to use? (Would get the message within hours)

SELF ASSESSMENT			
Job Retention Tools		Job Retention Skills	
Yes No	When you have to attend an event, do you generally run a little late?	Yes No	Have you ever walked off a job without giving notice?
Yes No	If you asked to do something on a job that you do not perceive is your job, do you get upset?	Yes No	Have you had more than one job that lasted less than a year?
Yes No	Have you gotten angry enough at job to have a verbal fight with a co-worker or supervisor?	Yes No	Can you use all of your past employers as references?
Yes No	Do you need skills for how to handle conflict and other situations at work?	Yes No	Did you ever leave a job because of a conflict with a supervisor?
Yes No	Have you had an employee evaluation at work that was less than positive?	Yes No	Have you ever worked at a job where your hours were continually cut until you almost had no hours?
Yes No	Are there some jobs that you might not be able to do because of a conviction?	Yes No	Have you had any problems with punctuality or attendance at a job.
Yes No	When you get an employee handbook at work, do you read it right away?	Yes No	Have you had problems retaining a job?

Vocational Skills, Occupational Skills, Academics and Training		Challenges you might face to working at a job or going to school.	
Yes No	Can you navigate the internet and use a computer?	Yes No	Are you pregnant?
Yes No	Are you currently in training, high school, vocational school or working on your GED?	Yes No	Do you have reliable transportation?
Yes No	Do you have a high school diploma or GED?	Yes No	Do you have a valid driver's license?
Yes No	Do you have ever earned any licenses, certificates or degrees?	Yes No	Do you have a social security card?
Yes No	Are you interested in going to school of any type?	Yes No	Do you have any mental or physical issues that might prevent you from going to school or going to work?
Yes No	If yes, which type of school would you like to attend? GED/HS diploma College, Certificate Program	Yes No	Have you ever been arrested or convicted of a crime other than a traffic violation? If so, explain.
Yes No	Do you know what kind of job you are interested in doing? If so, _____	Yes No	Where do you live? Own house Rent Live with someone Homeless Live in Shelter Other
Yes No	Do you have skills that you have developed through a hobby or volunteer job?	Yes No	Do you have reliable child care?



## Structured Interviewing

- Use open ended questions rather than closed to actively involve the participant in the process.
- Ask for their resources before you offer yours.

**Example:**

Do you have reliable childcare? Yes No. (Closed)  
 What kind of childcare do you have? (Open)

Do you have reliable transportation? (Closed)  
 What options do you have available for transportation if you went to school or got a job? (Open)



## Open Question Starters

<p><b>CLOSED</b>          Did you get along with your boss?</p>	<p>Tell me about your relationship with your boss.</p>
---	--

**What...  
 Why...  
 How...  
 Can you describe..  
 Tell me...  
 Can you say more about that?  
 What do you mean by \_\_\_\_\_ ?**

**I'd be interested in knowing....  
 I'm not certain I understand....  
 Can you give me an example?  
 What would you like to know about \_\_\_\_\_ ?  
 I'd like to help you find the best possible information. Can you tell me more about your interest?**

**Convert these into open ended questions.**

1. Have you been in a program like this before?
2. Have you been applying for jobs? Where?
3. Are you interested in going to school?
4. Are you going to start looking for a job right after school ends?
5. If offered employment can you begin working immediately?
6. Do you need help completing/developing your resume?
7. Do you know what career field you want to go into?

Draft Structured Interview Questions

Job Search Tools	Draft Structured Interview Questions:
Job Interviewing	So when was the last time that you can remember having a face to face job interview? How did you feel about your interview skills? What did you think you could have done better?
Resume	Tell me about your resume and what parts of it that you think might need improvement.
Voicemail	When you think about the voice mail message that you use and you think about a business person or possible employer calling it, what impression do you think your voice mail message would give the caller?
References	Tell me who you would use for a job reference (how you know the person, how long you have known them, and what you think they would say).

## Draft Structured Interview Questions

Job Retention/Work Habits	Draft Structured Interview Questions:
Punctuality	When you have an appointment at an office or are invited to an event, how would you characterize your punctuality? Generally would you be early, right on time or often running a little late? Talk about that.
Reasons for leaving	Think about the last three jobs you have held. Can you tell me the job and tell me what happened that made you leave those job?
Communication skills	Tell me about a time that you had a conflict on a job. Tell me what happened and how you handled it.
Attitude about self	What are your greatest strengths at a job and what are things you need to work on and improve?

## Draft Structured Interview Questions

Occupational Skills, Licenses, Diplomas, Credentials, Academics	Draft Structured Interview Questions:
Occupational Skills	Tell me about your marketable skills. What things can you do and which of those things are you really good at?
Education	Give me a run down of all of your education starting with high school. Tell me what certificates, diplomas, licenses and such that you have earned that might help you to get a job.
Vocational programs	You indicate that you want to be (fill in occupation) and that you want to go to school. Can you talk a little bit about how you decided that (fill in occupation) was what you wanted to do.
Work Experience, Internships, Community Service	We have business and non-profit partners who accept people for work experience, internships and community service projects. These types of programs help people get some real world experience in a particular field. What might be some advantages to you of using these services?

## Draft Structured Interview Questions

Plans for Outside Challenges (Housing, Legal, Family Management, Mental/Emotional, Physical Health)	Draft Structured Interview Questions:
Legal	Some occupations and professions prohibit individuals with certain criminal convictions from working in that field. Can you tell me about any legal issues that you have dealt with which could be a consideration for school or a job.
Financial Stability	In order to be able to go to school, you have to have some way to support yourself during that time. What ideas do you have about how you could live financially and you work toward increasing your skills?
Health considerations	So talk a little about your general health and how any health concerns could impact your ability to complete training or work at a job.
Family Support	What kind of assistance will your family or friends provide to help you get through the training?

### Writing Coaching Notes That Support the Plan

#### The Concept





**Three Types of Case Notes**

**Dear Diary causes a domino of problems.**



2/15/2014: Talked to Sue. She said things are going well. Son and family visited over the weekend and she had a nice time. All is well. She likes her work experience site and getting along well.



What's the plan?

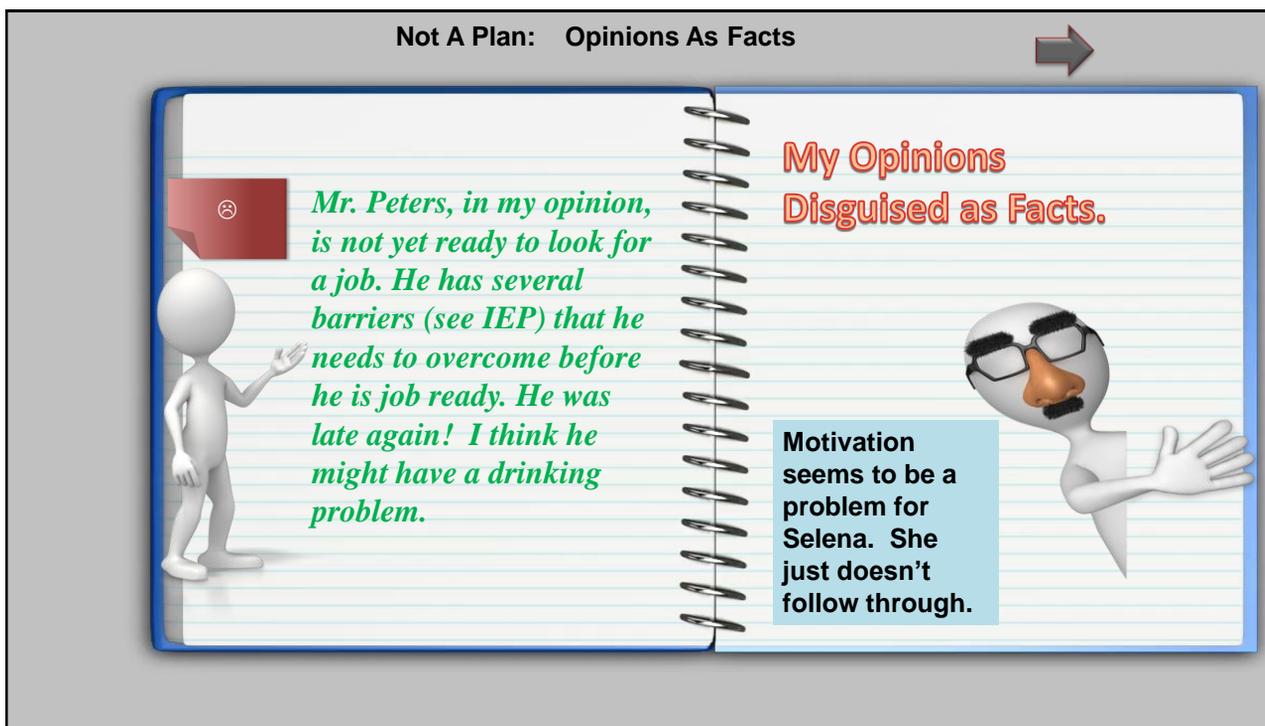
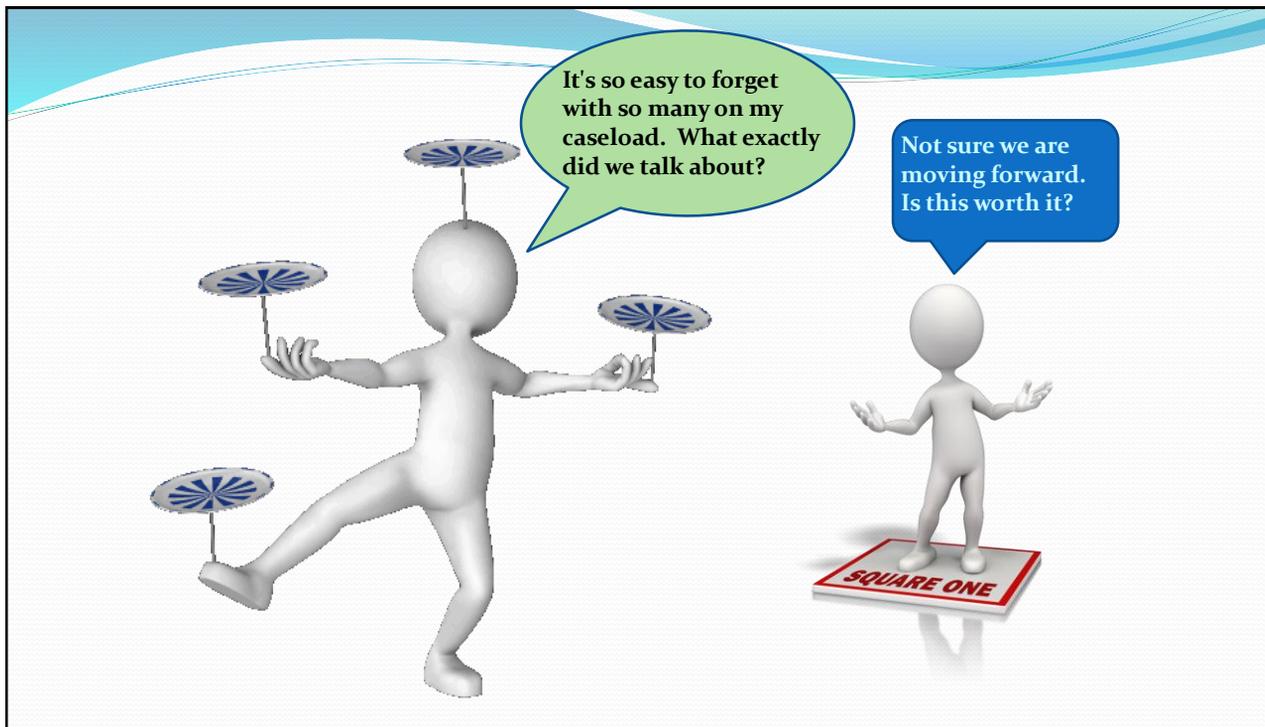


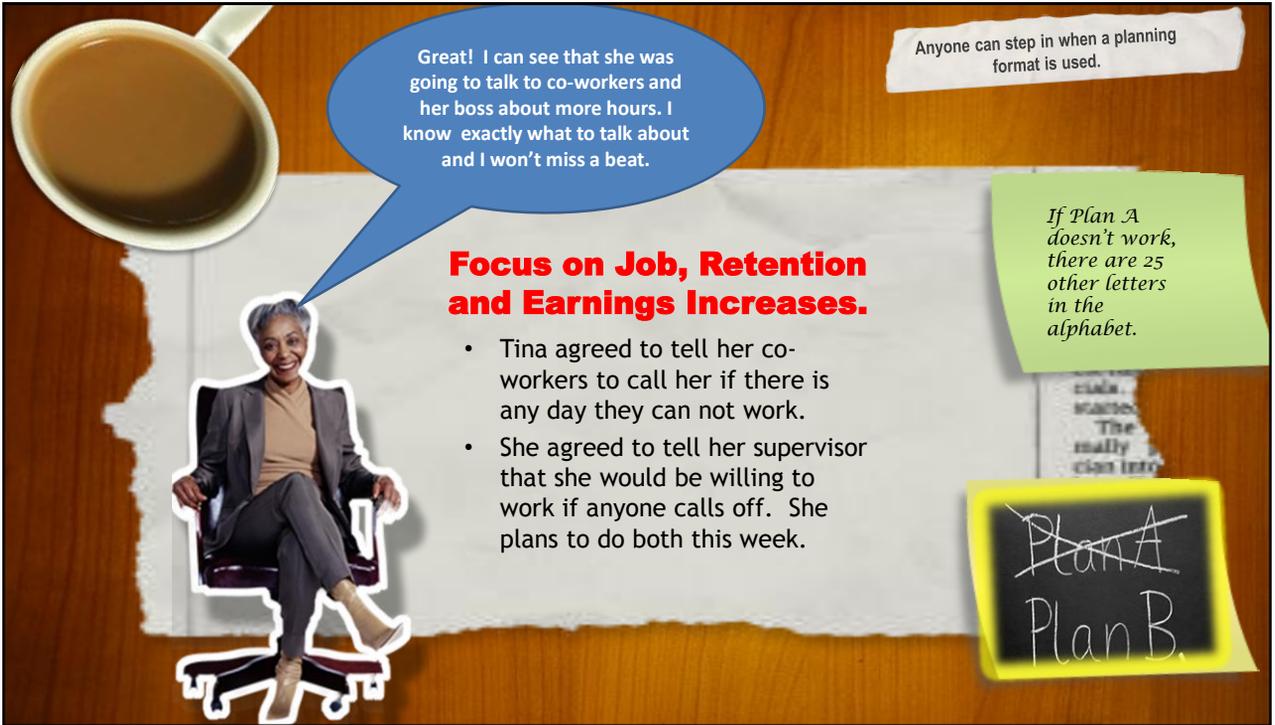
I already told him all of this. Why am I doing this? What a waste of time.



I vaguely remember having this conversation before. I can't remember. I'm gonna have to wing it.







Great! I can see that she was going to talk to co-workers and her boss about more hours. I know exactly what to talk about and I won't miss a beat.

Anyone can step in when a planning format is used.

**Focus on Job, Retention and Earnings Increases.**

- Tina agreed to tell her co-workers to call her if there is any day they can not work.
- She agreed to tell her supervisor that she would be willing to work if anyone calls off. She plans to do both this week.

*If Plan A doesn't work, there are 25 other letters in the alphabet.*

~~Plan A~~  
Plan B.

## Documenting via Case Notes



- Dear Diary (Reports a past event. Not planning related)
- Opinion (Should not be included in any case note. Not factual.)
- Planning (Planning related. Who is doing what by when.)

## Writing Case Notes that Get Results



Type	Case Note
	Lisa brought in pix of her baby. Says everything going well at the community service site. No complaints. She likes it okay and hopes this will help her to get a job. I agreed to review Stan's resume and provide feedback. I will email him comments by 09/15.
	Donna still doesn't know what job she wants to do. She dismisses anything she is qualified to do. And wants to do stuff she will never get.
	Marcy called me. She is depressed about being unemployed. She said she is looking but can't find anything.
	Emma agreed to review her Facebook page and delete all pictures that are unprofessional and review posts. It will be cleaned up by Monday 8/7.
	Vanessa says she is thinking about getting her GED. She said she knows she needs to get a diploma to be able to have more opportunity on a job.
	Joe agreed to go to attend job search workshop series and create a stronger resume, cover letter, and telephone script. He will attend the session beginning on September 13.
	Andrew's cell phone was stolen and he needs one for his job.
	Russ called to tell me that his car broke down so he didn't go to work yesterday. He did call his supervisor in advance.
	Carlos did not complete his financial aide agreement as promised. He never follows through.



**“We have a plan. Baby Steps. I am moving ahead.”**

Plans are mini-goals.  
Meeting goals gives sense of achievement.  
Getting a sense of achievement is motivational.