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| THE RECIPE FOR SUCCESS |
| YOU AND YOUR CONSULTANT |
|  |
| Willie a. glaster | consultant | September 9, 2023 |

# engagement

Your consultant will arrange for an initial meeting where you can introduce yourself and your community’s needs or your new endeavor. The consultant will introduce their purpose and role in achieving your goals. Our focus:

* Warmth
* Empathy
* And Genuineness

# the assessment

This is where your consultant will accurately identify and evaluate any problems, people, and situations of your interrelations, to serve as a sound basis for differential helping intervention. For our purposes, assessment is the investigation and determination of variables affecting an identified problem or issue as viewed from micro, mezzo, or macro perspectives. Secondly, this stage also involves preparation for interventions at any level of engagement. Thus, we plan to:

* Identify the Client
* Assess the Client/Clients-in-situation (micro, mezzo, and macro levels and diversity perspectives)
* Cite Information about client problems and needs.
* Identify Client strengths and insights.

# planning

Planning involves what to do. Planning follows assessment in the problem-solving process. Your assessment will set the stage for the intervention and planning. These eight steps will assist the consultant in his precise understanding of the next steps. See Form P on page \_\_\_\_.

1. Work with the Client/Clients
2. Prioritize problems.
3. Translate problems to needs.
4. Evaluate levels of intervention for each need.
5. Establish goals.
6. Specify objectives.
7. Specify action steps.
8. Formalize a contract.

# implementation

Implementation is the actual doing of the plan. The client and their workers/volunteers follow their plan to achieve their goals. Progress during implementation must be constantly monitored and assessed. Sometimes new issues, situations, and conditions require that the plan be changed.

# evaluation

Implementation is the actual doing and is critical for accountability. Each of your goals is evaluated in terms of the extent to which it has been achieved. Then the decision must be made about whether the case should be terminated or reassessed to establish new goals. Evaluation will become more effective as the plan moves forward.

# TERMINATION

The consultant and client relationship must eventually come to an end. Best practices in termination involve specific skills that your advisor/consultant has used many times during their experience with other groups and clients regardless of the level of intervention. This planned change could terminate in a myriad of ways.

* It may be a planned ending when the major goals have been achieved.
* Circumstances where a client or volunteer finds another job, funding source is distracted by personal issues.
* Clients may feel that the intervention is not working.
* Most terminations will follow a planned, steady progression.

# follow-up

Follow-up is the reevaluation of the Client’s/Volunteer’s situation at some point after the intervention is completed. Its purpose is to monitor its ongoing effects. Many times, this step will be the most difficult to follow. You, as the Client may be distracted by other issues and demands. The following information might be hard to get. Nevertheless, this is an important step in the intervention process. It also involves making sure that the Client/Volunteers are still functioning well on their own.

Form P

Planning

Step 1: Work with the client.

Step 2: Prioritize Problems. A. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

C. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Step 3: Translate problems into needs.

PROBLEM NEED

1. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ A. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ B. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ C. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Step 4: Evaluate levels of intervention for each need.

Need #1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Need #2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Need #3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Identify b. Propose Evaluate

Alternatives solutions

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  |  |  | | --- | --- | --- | --- | --- | | Micro |  |  |  |  | | Mezzo |  |  |  |  | | Macro |  |  |  |  |   Pros Cons Client Strengths |

Form P (cont.)

Step 5: Establish goals.

Step 6: Specify objectives.

Step 7: Specify action steps.

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  |  | | --- | --- | --- | --- | | 1. |  |  |  | | 2. |  |  |  | | 3. |  |  |  |   Who? Will do what? By when? How will you measure success? |

Step 8: Formalize Contract.

Form I

IMPLEMENTATION

Levels of Implementation

|  |  |  |
| --- | --- | --- |
| Micro | Mezzo | Macro |

|  |  |  |  |
| --- | --- | --- | --- |
| Follow Plan |  |  |  |
| Monitor Progress |  |  |  |
| Revise Plan (when necessary) |  |  |  |
| Complete Plan (to greatest extent possible |  |  |  |