

Detailed One-Day Agenda

Module One: Building Connection and Establishing a Plan

(suggested 8-9:30am; 8:30-10am; 9-10:30am)

- **Building Rapport**
 - Importance of first meeting
 - Questions to ask to increase rapport
 - Understanding closed communities and cultural differences
 - Common threats to rapport building
 - Importance of clearly establishing expectations and boundaries
 - Special considerations
 - Individuals with ASD/Asperger's
 - Non-native English speakers
 - Angry and frustrated people
 - Substance dependence
 - Learning disabilities
- **Setting Goals**
 - Reviewing expectations from third parties (conduct, BIT/CARE, counseling)
 - Assessing individual's needs and gaining buy-in
 - Keeping goals simple, attainable, measurable
 - Creating expectations around communications and failure
 - Transtheoretical change theory
 - Pre-contemplative and contemplative
 - Preparation and action
 - Maintenance and relapse
- **Assessing and Overcoming Obstacles**
 - Understanding the path to change
 - Strategies to get out in front of obstacles
 - Developing a response plan to hitting a problem
 - Review of common obstacles
 - Strong start and fading energy
 - Overly perfectionistic on progress
 - Addressing lack of buy-in
- **Mitigating Bias and Developing Cultural Competency**
 - Understanding sources of bias that impact assessment and interventions
 - The path to cultural awareness, proficiency and competence
 - How to avoid microaggressions and assumptions
 - Common missteps to avoid

Module Two: Assessing Risk and Making a Referral

(suggested 10:00-11:30am; 10:30-12:00am; 10:30-12:30pm)

- **Defining Scope of Practice**
 - Understanding limits to the services you can offer
 - Clearly communicating through brochure, website, flyer, informed consent
 - How to recognize when to assess for risk
 - Developing a familiarity and training with on-campus/workplace supports and resources
 - Understanding privilege, private and confidential

- **Building a Community Referral Network**
 - Assessing common client needs from past experience
 - Importance of finding accessible, culturally appropriate resources
 - Online vs. in-person resources and support, addressing access issues
 - Identifying resources in community for:
 - Food insecurity, housing and financial assistance
 - Counseling and victim advocacy for sexual assault
 - Academic or workplace skill support
 - Title IX, harassment, sexual assault, stalking
 - Disability services, ADA/504

- **Referral and Documentation**
 - Understanding limits to the services you can offer
 - Difference between warm and cold referral
 - Importance of follow-up after the initial referral
 - Dos and Don'ts of documentation:
 - Notes that are too long or too short
 - Avoiding the use of jargon, diagnoses and third-party names
 - Watching tone, avoiding subjective opinion
 - Understanding audience
 - Examples of good and bad documentation
 - Addressing FERPA, HIPAA and state confidentiality laws

- **Case Examples: From Risk Assessment to Referral**
 - Each case will include a narrative, risk assessment checklist and documentation example
 - Avoiding suicidal thoughts and behaviors
 - Threats to others
 - Title IX (stalking, sexual assault, domestic violence, harassment)
 - Abuse of a minor
 - General mental health concerns

Module Three: Motivating the Unmotivated

(suggested 12:30-2:00pm; 1:00-2:30pm; 1:30-3:00pm)

- **Developing the Proper Mindset**
 - Assessing current feelings and frustrations you may have
 - Connecting current challenges with past experiences
 - Identifying your personal “buttons and goats”
 - Cycle breathing and mindfulness
 - Staying goal focused

- **Understanding the Frustration**
 - Exploring source of concern
 - Current and acute frustrations
 - Past negative experiences
 - Microaggressions, bullying, judgement, injustice

- **Acute Violence De-escalation**
 - Preparation of office, backup, panic buttons, knowing escape routes
 - Verbal Judo techniques to calm
 - Distraction statements and questions
 - Redirection of anger
 - Using MOREPIES and hooks/barbs

- **Building a Bridge of Connection**
 - Identifying differences between helper and other
 - Assessing the current quality of the bridge
 - Looking for similarities and hooks
 - Minimizing differences and barbs

- **Putting Motivational Interviewing into Action**
 - Brief history of MI and MET
 - Review of the five categories (expressing empathy, developing discrepancy, rolling with resistance, avoiding argumentation and supporting self-efficacy)
 - Practical examples of MI through case example:
 - Extreme anger and frustration
 - Overpowering anxiety and worry
 - Hopelessness and feeling overwhelmed
 - Accusatory and argumentative
 - Avoiding common MI traps
 - Expert trap (having all the answers)
 - Moving too quickly to a solution
 - Confronting or lecturing
 - Solving the wrong problem

Module Four: Growing and Maturing the Team

(suggested 2:30-4:00pm; 3:00-4:30pm; 3:30-5:00pm)

- **Developing Goals and Making Referrals**
 - How to develop goals for students
 - Writing goals into an action plan
 - Culturally competent referrals
- **Case One: Suicide Risk**
 - Assessing the risk and suicide gatekeeping
 - Locating a timely referral source
 - Documentation and notification of supervisor/on-call
 - Importance of follow-up
- **Case Two: Harm to Others**
 - Assessing the risk to the community or specific person
 - Locating a timely referral source for further assessment
 - Documentation and notification of supervisor/on-call
 - Taking steps to ensure your own safety
- **Case Three: Addressing Academic or Work Challenges**
 - Gathering specific information about the difficulties
 - Developing a clear action plan they can buy into and follow
 - Documentation and referral to additional resources or departments
- **Case Four: Delusions and Paranoia**
 - Assessing the risk and keeping clam
 - Techniques to avoid further escalation or arguments
 - Locating a timely referral source
 - Documentation and notification of supervisor/on-call
- **Case Five: Title IX**
 - Assessing the medical risk and potential danger from others
 - Understanding reporting requirements; locating a timely referral source
 - Documentation and notification of supervisor/on-call
 - Importance of follow-up
- **Case Six: Substance Abuse**
 - Assessing medical safety and when to disengage if intoxicated currently
 - Gathering basic intake information around use and frequency
 - Establishing plan for help, identifying referral sources and next steps
 - Documentation and notification of supervisor/on-call

Thematic One-sheet Documents and Directions (TODD)

You have a lot to do in your daily job, let TODD lend you a hand when it comes to key CARE and threat team processes. TODD is there to answer specific questions and address issues such as:

- How to Best Build rapport
- How to Set and Achieve Goals
- Understanding and Using Transtheoretical Change Theory in your Work
- Mitigating Bias and Cultural Competency
- Best Practices in Making a Referral
- How to Document a Referral Well
- Building a Bridge of Connection
- Motivational Interviewing in Practice
- Acute Violence De-escalation



Risk Assessment Checklists

For academic advisors, non-clinical counselors and front-line staff, assessing initial risk is often about the concept of triage. These risk checklists provide a consistent and clear approach to understanding when to refer a behavior to the next step.

- Avoiding suicidal thoughts and behaviors
- Threats to others
- Title IX (stalking, sexual assault, domestic violence, harassment)
- Abuse of a minor
- General mental health concerns

Case Studies

These six case studies covered in module four are included here in a clear format outlining goals and next steps for each the five cases.