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.