



Workbook for Self-paced learners

Slide 2

Today's objectives

At the end of the in-service learners will be able to:

1. Describe ways communication changes for different ways appointments are provided
2. Use agendas to set the stage for remote appointments
3. Use critical thinking to navigate difficult phone conversations using participant-centered strategies
4. Use O.A.R.S skills for remote appointments and communications

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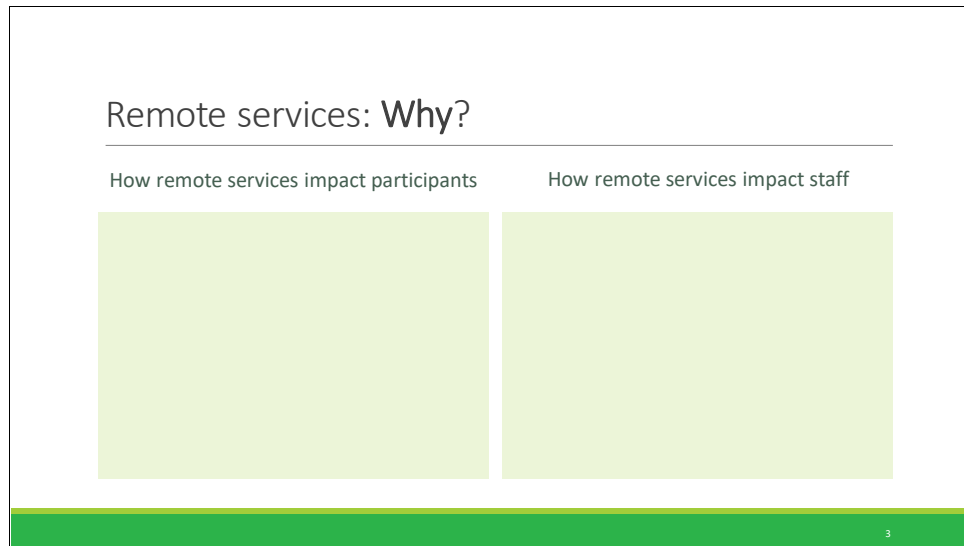
We know you have been doing remote appointments for the last 4 years. Use these tips as a refresher and guide for ways to include the spirit of participant-centered services (PCS) in everything at WIC.

This in-service packet includes methods for different types of sharing.

Completing this as a self-paced in-service

Use this workbook alone or with the PowerPoint slides. We encourage you to talk over what you have learned with your Training Supervisor.

Slide 3



This in-service has multiple slides with discussion topics set up like this. It is intended to prompt a discussion.

Activity

Accept all answers – it's a brainstorm! There are no wrong answers. Here are some options for using these slides. The following options apply to each discussion slide.

Activity Options:

- **Self-paced:**

Type your thoughts into the slide, the table on the next page, in a separate document or write them down on a sheet of paper.

Remote services: WHY?

Type your thoughts in the table below

Ways remote services impact participants	Ways remote services impact staff

Slide 4



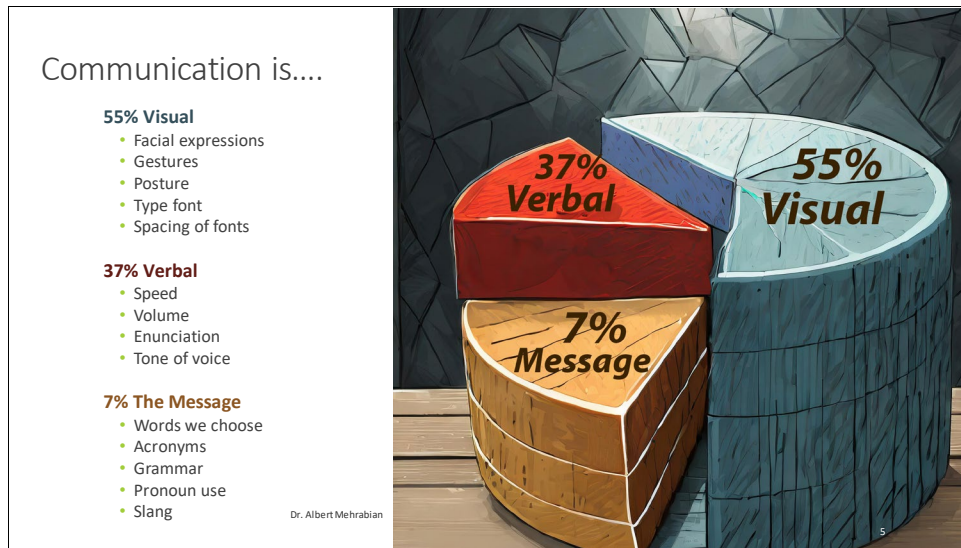
What is communication?

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Section: Communication Overview

Communication is complicated. For communication to be successful there is a sender and a receiver. But like the game of “telephone,” the message can get distorted as it is sent.

Slide 5



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Here's one way to look at how we communicate:

55% visual, 37% verbal, and only 7% is the message or the words we choose. All three need to send the same message for it to have a chance to be heard the way it is intended.

Dr Albert Mehrabian first established this definition of communication. The focus of his work was about how these aspects of communication need to match. A Mismatch between the communication types causes confusion.

For example, if we shout, "You're a great Mom!" in an angry, loud tone while gesturing wildly, a participant might not believe us!

The communication rule is also helpful to understand how much our nonverbal communication influences the message we send. This becomes even more important when one type of communication is missing.

Think about conversations you have had. Can you remember a conversation where the words the other person said did not match what you saw or how it sounded? How did that make you feel? What questions did you have at the time?

Paying attention to our nonverbal communication – even when on the phone or writing text messages – is key to sending a clear message.

The slide features a title 'Communicating during remote appointments' at the top, accompanied by an icon of a smartphone with three overlapping sticky notes. Below the title, the instruction 'Brainstorm a list together:' is followed by two large, light-green rectangular boxes. The left box is labeled 'What's different?' and the right box is labeled 'What's the same?'. A green horizontal bar at the bottom of the slide contains the number '6' on the right side.

Activity:

Brainstorm the differences and similarities staff experience when communicating with participants remotely.

Self-paced:

Type your thoughts into the slide, the table on the next page, in a separate document or write them down on a sheet of paper.

Some differences we've heard;

- Participants forget about the appointment
- Participants are often not at home. They're at the store, driving the car, at a friends' house, at work.
- Participants are at a restaurant or ordering at the drive through
- Participants are often distracted by their children.
- It can be clunky getting signatures remotely
- We can feel more urgency about the content than the participant in the conversation.

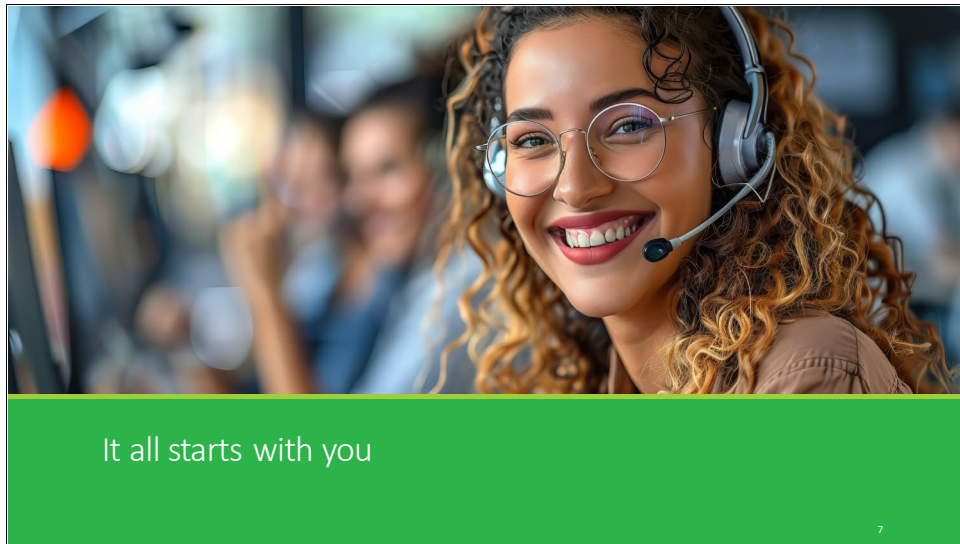
Some things that are the same:

- There is an agenda to the call.
- We need specific information.
- There is a time limit to the call
- We are following a schedule


Communicating during remote appointments brainstorm:

What's different?	What's the same?

Slide 7



Participant-centered services begin with YOU!



If we can't see each other, does it matter?

Does this sound familiar?

- They can't see me, so I can wear my pjs!
- Why do I need to smile? I'm not feeling it today.
- It doesn't matter where I sit – on the floor is great. No one will know!
- No one will know if I'm scrolling through my email during a call.

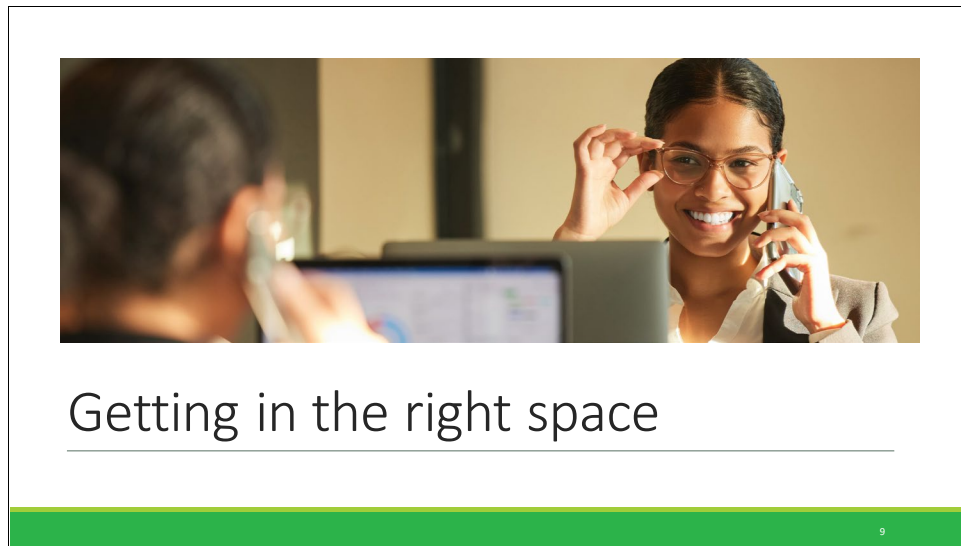
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Discussion prompt:

If we can't see each other, does it matter?

Consider the following:

- Even though a participant can't see you when you are talking on the phone, your body language has a big impact on the quality of the phone call.
- Sit up straight when talking to clients over the phone. Good posture will make you feel more confident and will help ground you in any tough questions or awkward silences.
- If you are able, use a headset so you can use your hands when speaking. This makes the conversation move more smoothly and feel more natural.
- Smile! Smiling will make your voice sound warmer and boost your mood.
- Behavior is communication. Whether it is seen or unseen, your behavior is heard and communicates to your communication partner, the participant.



In an article about effective health virtual health coaching, one health coach shared, “I put a mirror next to my laptop to make sure I am engaged.” She put the mirror next to her computer so she could see her facial expressions while she spoke to people. If she didn’t look engaged in her mirror, she changed what she was doing.


Whether or not the participant can see you, your nonverbal communication comes through, loud and clear. Common trouble spots:

- Distracted by email
- Distracted by TWIST
- TWIST is something we know you need to do while you are on the phone with the participant. Let your participant know that you are putting information in or retrieving information from a data system so you can issue benefits at the end of the call.
- Distracted by things on your desk
- Mis-matched facial expression and words.

What are some of your observations of when your words do not match what is happening around you?

Why is this important?

1. The participant hears the disconnect in your words and actions
2. Participants will reply with the same manner they receive. It is easier for them to be distracted when they do not hear that you are fully engaged with them.




Tips for better conversations

- Be in a space where the conversation is private
- Turn your phone to silent
- Minimize your email
- Turn off email and chat notifications
- Use the mirror trick!
- Limit distractions in your workspace

Trust is the center for providing participant-centered services. These tips will help maintain trust between you, ensure your participants know what they share is private, and keep you focused so you can listen actively.

- Be in a space where the conversation is private.
It is important to remember your conversation with a participant is private. Make sure you are in an area where they will not hear other people talking – and other people will not hear you!
- Turn your phone to silent.
If your cell phone is on your desk turn it to **silent**. Vibrating phones on a desk can be heard over the phone.
- Minimize your email
If you can't see it, it's less tempting!
- Turn off email and chat notifications.
This also stops the chimes you receive.
- Use the mirror trick on the previous slide
Watch your reflection out of the corner of your eye. Distraction is easy to see.
- Limit distractions in your workspace
This reduces the temptation to work on something else AND your participant can hear you shuffling papers or moving things around.



It's your turn!

Pair up.
Turn your back to each other or go into different rooms and call each other. Practice scowling, slouching in your chair, and flipping through a book or reading a web page while saying the usual pleasantries.

Then repeat the call with your best foot forward: sit up straight, clear your work area, and smile!

Can you hear the difference?

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Activity


Practice what it sounds like when you aren't engaged...people can tell. Just like you can tell when they are not engaged with you.

Pair up with a colleague or friend

Turn your back to each other or go into different rooms and call each other. Practice scowling, slouching in your chair, and flipping through a book or reading a web page while saying the usual pleasantries.

Then repeat the call with your best foot forward: sit up straight, clear your work area, and smile!

Can you hear the difference?



The sound of silence

- Holding the silence is powerful
- Gives the other person time to
 - think about what you said
 - apply it to their situation internally
 - decide how to reply
- Is often so loud it redirects a participant back to the conversation

Being silent is powerful.

Research tells us that people have different processing times. Some people who experience aphasia or other speech-related challenges take longer to reply. It can take up to a minute to take in what was said, process what it means, and craft a reply for you.

For most people being actively quiet (that is, listening in the silence) for 5- 10 seconds allows the participant enough time to begin to respond or reply.

Silence is also cultural.

A study found that native English speakers start to get uncomfortable after 4 seconds of silence. However a similar study in Japan found they were comfortable with up to 8 seconds of silence.


Activity:

Set a timer for 10 seconds. Have someone in the group ask you a question. Start the timer. Wait for the timer to go off before replying.

How did you feel during your wait for a reply?

O.A.R.S. works remotely, too!

- O** Open-ended questions
- A** Affirmations
- R** Reflections
- S** Summaries



The logo for Oregon WIC Listens features a stylized globe with a green figure on the left and an orange figure on the right, both appearing to be in conversation. The text "Oregon WIC Listens" is arched over the globe.

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Everything we have and will share is done by using OARS.

There are many tools for individual learning on the WIC Staff pages related to OARS skills.

Summarize the O.A.R.S skills.

OARS tip sheets:

- Open –Ended questions:
https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwlc_e_open-ended_1_staff.pdf
- Affirmations:
https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwlc_e_affirmations_1_staff.pdf
- Reflections:
https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwlc_e_reflections_1_staff.pdf
- Summaries:
https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwlc_e_summarizing_1_staff.pdf

OARS skill cards you can use:

- **Open-ended questions:**

<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/pg-skills-openended.pdf>

- **Affirmations:**

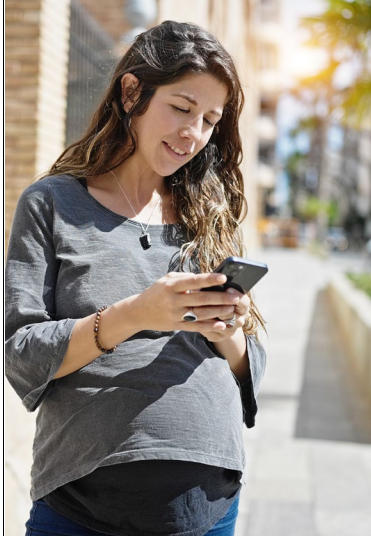
<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/pg-skills-affirmations.pdf>

- **Reflections:**

<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/pg-skills-reflections.pdf>

- **Summaries:**

<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/pg-skills-summarizing.pdf>

A photograph of a pregnant woman with long dark hair, wearing a grey long-sleeved shirt, looking down at her smartphone. She is outdoors, and the background is slightly blurred, showing what appears to be a brick wall and some greenery.

Tips for participant-centered conversations

- Plan ahead
- Know your options
- Practice
- Use trauma-informed practices
- Practice being comfortable with silence
- Listen actively
 - Remember your OARS training!

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Affirmations and reflections

Affirmations are statements and gestures that recognize a participant's strengths and acknowledge behaviors that lead in the direction of positive change, no matter how large or small. Affirmations build confidence in one's ability to change. To be effective, affirmations must be genuine.

- Reflective listening is meant to close the loop in communication to ensure breakdowns don't occur. There are three levels to reflections.
- Repeating or rephrasing: Listener repeats or substitutes synonyms or phrases and stays close to what the speaker has said.
- Paraphrasing: Listener makes a restatement in which the speaker's meaning is inferred.
- Reflection of feeling: Listener emphasizes emotional aspects of communication through feeling statements. This is the deepest form of listening.

The flow of a phone appointment



- 1 Review the chart**
 - How many people are in the household?
 - What are their names?
 - What is the most recent goal?
 - Check food benefit redemption
 - Gather potential information to share (based on what you read in the chart)
- 2 Call the participant**
 - Greet the participant by name
 - Introduce yourself, your role and why you are calling.
 - Ask if this is still a good time to talk

Take a deep breath and center yourself

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This slide has animation

Each numbered point will enter automatically. If you need it to fade in before the animation begins, hit “return” or the arrow key to start the animation.

The flow of a phone appointment



- 3 Set the agenda**
 - Today I'd like to...
 - After that we will set an appointment for you next visit and issue your benefits
 - This will take about X minutes
 - Before we get started, do you have any questions for me?
- 4 Follow up on previous plans or goals**
 - Probe
 - Affirm efforts
 - Explore
 - Ask permission to offer ideas
 - Explore possible next steps
 - What questions do you have for me?
 - Summarize and review

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Each numbered point will enter automatically. If you need it to fade in before the animation begins, hit "return" or the arrow key to start the animation.

The flow of a phone appointment

5 Offer nutrition education

- Offer topics to explore and follow participant lead
- Ask permission to share nutrition education

6 Repeat Steps 4 and 5 for other members of the household

- Be mindful of the time
- Listen for fatigue in the participant
- Offer a summary at the end of each discussion topic

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Each numbered point will enter automatically. If you need it to fade in before the animation begins, hit “return” or the arrow key to start the animation.



The flow of a phone appointment

- 7**
Talk about WIC food use and possible changes
 - Tailor the food package as needed
- 8**
Issue benefits
- 9**
Schedule the next appointment
 - Share what to expect for the next appointment
- 10**
Thank them for their time!

17

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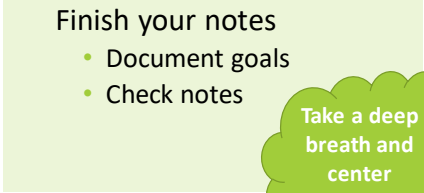


The flow of a phone appointment

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Finish your notes

- Document goals
- Check notes

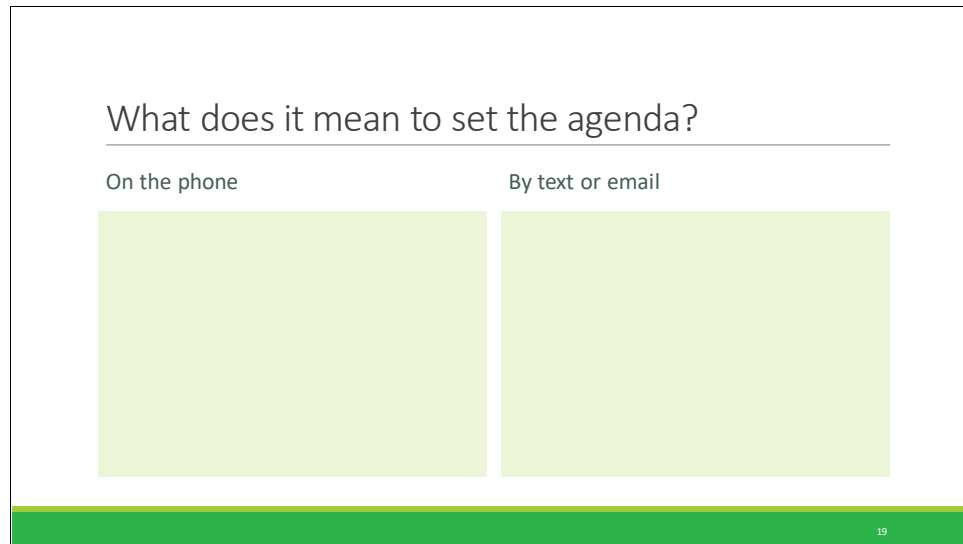
Take a deep breath and center yourself



18

This slide has animation

Each numbered point will enter automatically. If you need it to fade in before the animation begins, hit “return” or the arrow key to start the animation.



Activity

No matter your role, let people know what's going to happen during your interaction...whether it is on the phone, by text, or zoom! Knowing what to expect for the call is as important as your "elevator speech" introduction! Take a few minutes to practice setting the agenda for a recertification appointment.

Work with a colleague. Find a friend or work partner to try this out. One person is participant, the other is WIC staff. Practice the beginning of a phone call by introducing yourself, confirming the participant, and setting the agenda for the appointment.

Look for:

- Welcome
- Establish rapport
- Tell participant what will happen during the conversation or message session
- Share how long you think it will take
- Ask if there's anything else they want to discuss that you didn't mention

What does it mean to set the agenda?

On the phone	By text or email

Slide 21





When participants are distracted

- Ask if they need a minute to get settled before starting the conversation
- Use clear, plain, and direct language
- Ask if they have specific questions at the start
- Ask "I can tell you've got a lot going on. What would be the best use of our time today?"
- Consider rescheduling if appropriate
- Take a deep breath

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Life is busy. Things never quite go the way you plan. Things may have changed since the appointment time was set or the participant may have forgotten. Many times our participants need to pay attention to their children for their safety. Whatever the reason, it's easy to be distracted when talking on the phone.

This is when it helps to think about how you say things. Keep your messages to the point.

Tips:

- Avoid acronyms or "WIC Slang."
- One topic for each sentence or conversation turn



What is your agency's policy when a participant is distracted?

Talk it over

You are talking with a participant who is very distracted.

They will fall off the program if you cannot complete this appointment.


What is your agency's guidance for this situation?

Here are some tips when talking to someone that is distracted:

- Ask the participant if there is anything they need to quickly take care of before you start the conversation
- Ask them if they have any specific questions and consider addressing those first.
- Ask them what the best use of your time together would be.
- Use clear and concise language.
- Use simple, direct and specific words to convey your main points.
- Check for understanding and clarify anything that they may have misunderstood.
- Summarize what you have talked about at the end of the call.
- Don't take their distraction personally or get frustrated with them.
- Be supportive and understanding. Offer them help or support if they need it.

Discussion prompt:

What is your agency's policy when a participant is distracted and unable to pay attention to the conversation?



It's your turn!

You call a participant at the scheduled time.

They answer the phone. You learn they are in the checkout line at the grocery store! They are also managing three children during checkout. You know this because they are calling out to their children during the conversation.

What do you do?

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Discussion Prompt

Focus questions:

What are some ways you can manage this situation?

With each idea, ask these questions:

- Does the solution focus on the participant?
- Does the solution use one of the OARS skills?
- If not, how can it be reframed to fit the spirit of PCS?

Self-paced:

If staff are completing this in-service independently, consider starting a chat thread or bring it up as a discussion at the next staff meeting.



You call a participant at the scheduled time.
They answer the phone. You learn they are in the checkout line at the grocery store! They are also managing three children during checkout. You know this because they are calling out to their children during the conversation.


What do you do?



Remote appointment options can mean we are communicating with participants more in writing – by text, email, or through forms – to do the work done in an in-person visit.

Here are some introductory tips to help. (on the following pages or slides)

Tips for communicating by text or email



Use **active** tense

Use **fewer words** in the text than in person

Set the agenda of what needs to be done:

- There are three documents I need you to sign by Text today.
- We will be talking about the documentation needed for participation in

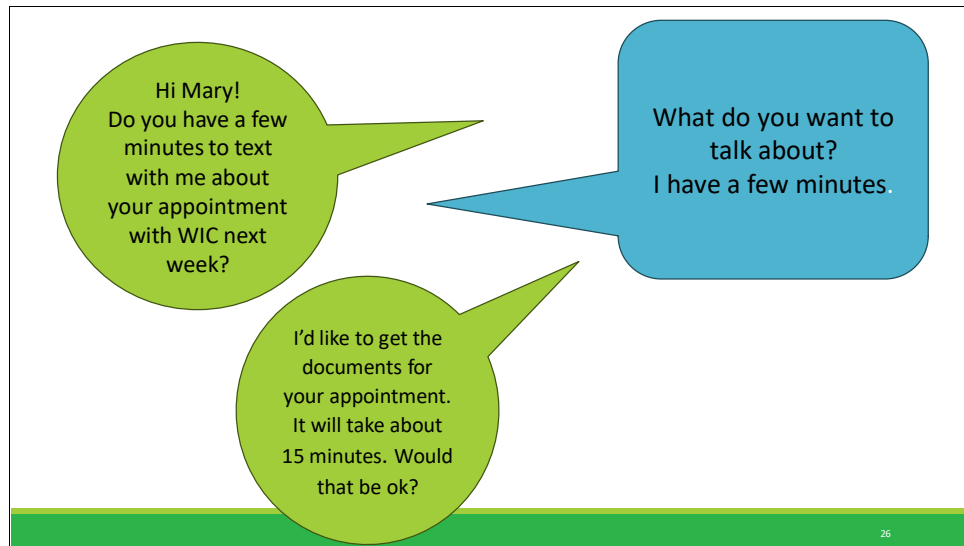
Get to the point right away

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It is difficult to convey tone when communicating with a participant over text and email. Some people might interpret too short of an answer as mean or uncaring. It's tricky to get the right balance. Here are a few things to consider:

- Use language that is easily understood by the recipient. Avoid jargon and abbreviations. Avoiding language that may be unfamiliar to them.
- Avoid texting shorthand such as OMG or LOL or BRB, IDK
- Proofread messages before sending to ensure clarity and accuracy.
- One point per sentence (do not write long run-on sentences)
- Wait for a reply before moving on to the next topic.
- For example, text: "Here's the link for Rights and Responsibilities." Wait for response before sending Voter Registration.

Slide 27

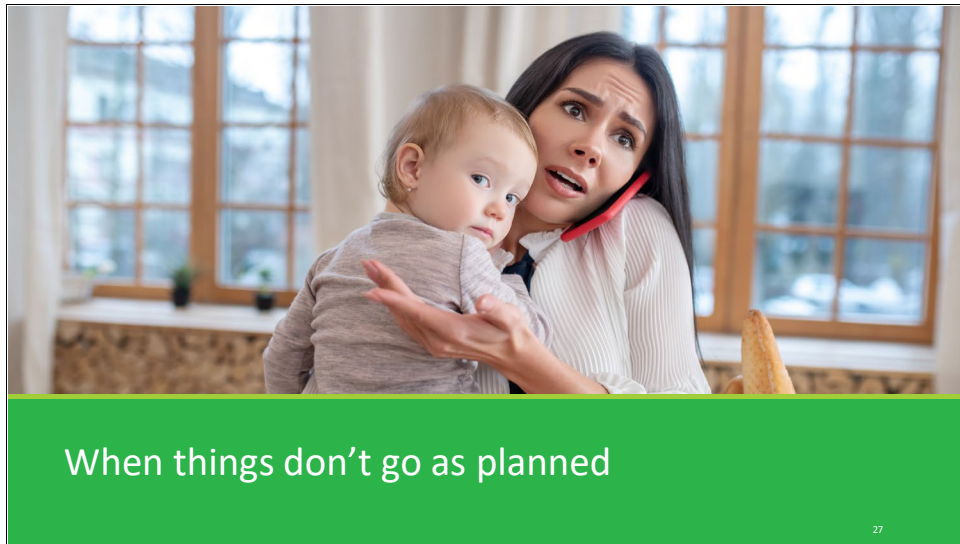


How do you respond to texts from your doctor's office? Do you respond right away? Leave it for a while? Forget about it? Our participants might do the same with our texts.

Participants may not be in a good place to respond to your text if you do not have schedule time. Build in time for replies – even up to da day – rather than expecting people to respond quickly.

Open with a question and set the stage for how long – or how many steps – need to be accomplished.

Setting an agenda, even over text, gets everyone on the same page about the process.



This document is a great resource for dealing with resistance.

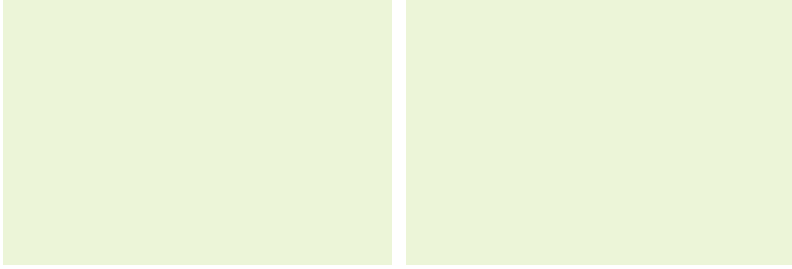
Oregon WIC Listens: Dealing with resistance:

https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/ce_resistance_staff_1.pdf

I remember....

On the phone

By text or email



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Activity

We all have a story of when things did not go well. Share a story about a situation during which you struggled to keep things on an even keel.

Here are some topic prompts. Share...


- A time when the call was doomed from the start (the participant was escalated at the very start)
- A participant became escalated during the conversation.
- **You** felt escalated and frustrated and it began to show.

What do you wish you had tried or done differently in this situation?

When things don't go as planned

What are some signs a participant is becoming upset?

- Volume increases
- They use negative or sarcastic comments
- They stop talking
- They interrupt or are quick to cut in
- They stop talking all together



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These are some common signs a person is “escalating” What does it mean to escalate? It means the person you are talking with is becoming more frustrated as your conversation continues. They may become very angry.

This slide has animation that runs automatically

The photo of the woman on the slide fades out with a text box that fades in. The text box says, "Remember: You are not required to tolerate abusive behavior. Check with your Coordinator for agency policy for this situation."


When things don't go as planned

What can you do?

- Stay calm
- Listen. Focus on what they are saying without offering affirmations
- Use a steady, calm tone
- Practice ways to end the call
"You are upset. Would you like to continue this conversation by email or come into the office?"

Remember:
You are not required to tolerate abusive behavior.

Check with your Coordinator for agency policy for this situation



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When things don't go as planned

What can you do?

- Stay calm
- Listen. Focus on what they are saying without offering affirmations
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"You are upset. Would you like to continue this conversation by email or come into the office?"


Remember:
You are not required to tolerate abusive behavior.

Check with your Coordinator for agency policy for this situation



Tips for challenging phone calls

- It's not you
- Empathy is powerful
- Be trauma informed
- Take care of yourself after the call



It's not you

Hard to remember in the moment, but the person on the phone is not mad at you personally. It could be many things such as

- Frustration with children in the room
- Frustration that they forgot about the call
- Lack of sleep
- Frustration with another area of life. One never knows what has been happening right before your call.

Empathy is powerful

Use reflective listening to demonstrate you are listening:

- “That sounds hard.”
- “I can understand how this is upsetting.”
- The classic Empathy video helps frame a discussion of how to respond:
<https://youtu.be/1Evwgu369Jw?si=qc78XIQSq1YLwkU7>


Be Trauma informed

A key element of being trauma informed is this question: **what happened TO you?**

Life is hard. Challenging behaviors are often the result of a traumatic or stressful moment in a person's life. Using the participant-centered skills you have learned is a way of using trauma informed practices. Sometimes the best thing you can do is listen.

Take a break to take care of you

- When the appointment is over, take a break.
- Self-care is very important to being able to be participant centered!



It's your turn!

You are on the phone with a WIC Dad
He is upset that he is not able to buy whole milk for his 4-year old, who refuses other types of milk

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Activity

Discussion prompts:

What are some ways you can manage this situation? With each idea, ask these questions:

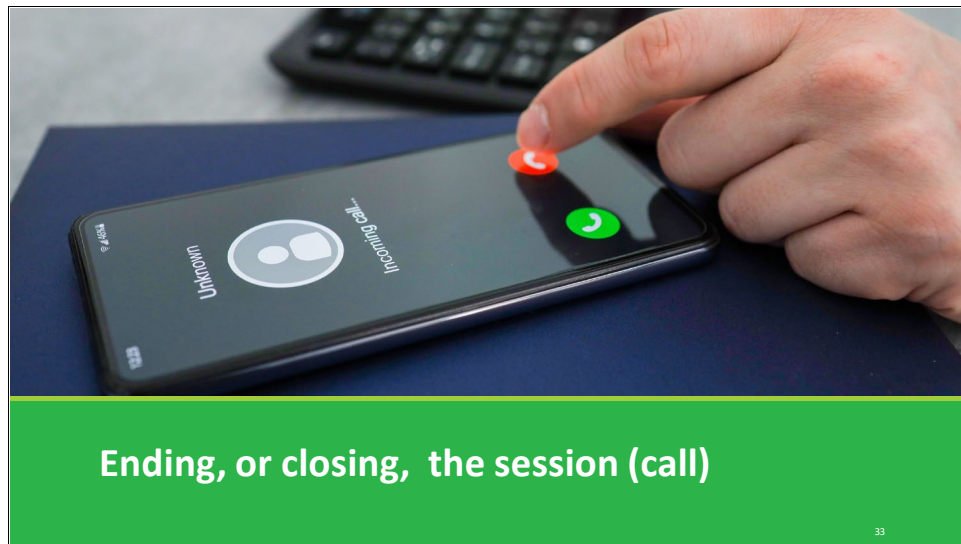
- Does the solution focus on the participant?
- Does the solution use one of the OARS skills?
- If not, how can it be reframed to fit the spirit of PCS?

Write out your ideas in the table on the next page



You are on the phone with a WIC Dad. He is upset he is not able to buy whole milk for his 4-year-old who refuses other types of milk.

What would you do?



Resource:

Oregon WIC Listens Skill Card: Ending the session:

<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Documents/orwl/pcg-skills-closing.pdf>

Optional: Run through the points on the skill card linked above as a refresher.

What are some tricks you use to end a call that is going long?

On the phone	By text or email

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Activity

Option 1:

Talk about it. Maybe write down ideas on a white board

Option 2:

Have people post their ideas using a post-it note on the board. Review and categorize.

Option3:

Break into pairs. One is participant, one is WIC staff. Practice the ending a phone call using the PCS skill card "Closing the Session"

Self-paced option:

Complete the table on the next page.

What are some tricks you use to end a call that is going long?

On the phone	By text or email

Trauma Informed Care for participants

What you experience
The participant wants to talk about everything but proofs!

What they are experiencing
You are the first person they've talked or texted with in DAYS who will listen to them talk about their baby!

What you can do

- Listen for understanding
- Let them talk until they are ready to pause
- Provide an affirming summary as a bridge
- Remind them about the agenda – but do it kindly
- Ask to reschedule

In most situations, listening is the best thing you can do. It is a welcome gift.

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This slide has animation.

The four content areas will automatically appear .

It is always important to keep trauma informed care at the forefront of everything we do.

Trauma-informed care shifts the focus from *“What’s wrong with you?”* to *“What happened to you?”*

What are some things that may be a symptom of more that you have heard about today?

Some ideas:

- The chatty participant may have just delivered a baby without a lot of support and is feeling overwhelmed and lonely.
- The angry dad may be frustrated that his child will not eat anything, and milk is the only thing that he consumes.
- Practicing trauma informed care and having empathy for our participants goes a long way



A little empathy goes a long way..

Tips on empathy from Brene' Brown

(https://youtu.be/1Evwgu369Jw?si=j0cXYLns_0FRMjT)

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Resource

Viewing this video is optional. If you do not wish to use the video, either deleted it from the slide deck or “hide” the slide.

https://youtu.be/1Evwgu369Jw?si=j0cXYLns_0FRMjT

This slide is hidden. To use it in slide show mode, right click the slide number in the slide list and select “unhide slide”


Ending the call

Being participant centered means not offering what you cannot provide.

In this case, it's more time!

Offering to answer questions at another time leaves the door open **and** allows you to get to the next participant.

- Include a time limit when setting the agenda
- Share a specific time the call needs to end
- Watch how you word phrases:
 - Please feel free to reach out with questions!
 - Rather than, “do you have any other questions?”



For many participants, coming to the WIC office may be their only chance for social interaction. When you are in person, there are physical things you can do to naturally close the appointment such as gathering up handouts, standing up from your desk or walking the participant out of the clinic room. When conducting appointments over the phone, you do not have those physical cues. Here are some tips to respectfully end a conversation with a chatty participant.

Ending the appointment when the participant has more to say



It's fun to hear all that's going on with [child's name] and how you are putting what you learn into place. Unfortunately, I do have to move on to another call. I look forward to our next appointment on [insert date]

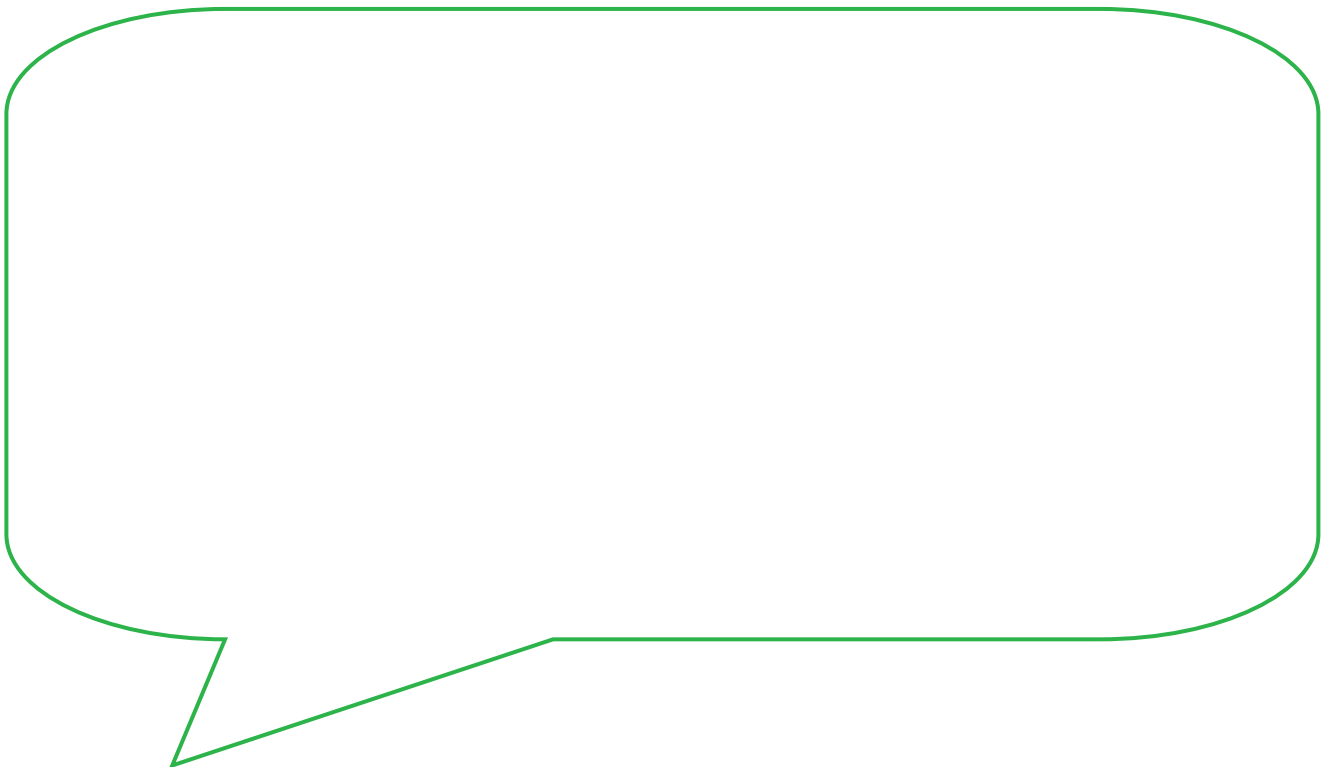


And when I give him lemon slices, it's so funny! She makes this face after she takes a bite...and....and....and.....

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Self-paced option:

Write some sample ways you could end a conversation in the space below




It's your turn!

You are on a call with a proud grandma. You have completed the assessment, issued benefits, and discussed next steps.

She has more to say! Not much of it is related to WIC.

She wants to tell you about her other grandchildren and their eating habits too!



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Activity

Focus questions:

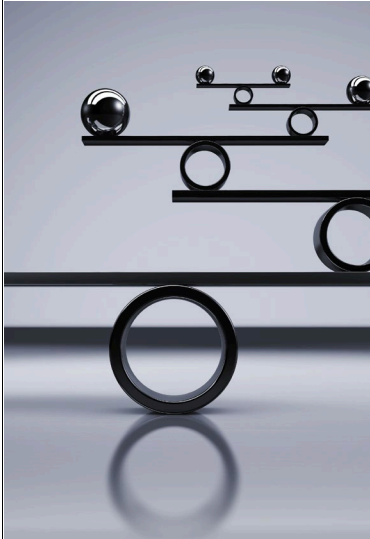
What are some ways you can manage this situation?

With each idea, ask these questions:

- Does the solution focus on the participant?
- Does the solution use one of the OARS skills?
- If not, how can it be reframed to fit the spirit of PCS?

Self-paced:

Share your thoughts on this situation below.



Taking care of You

It's a balancing act

- Make time for breaks or meals.
 - Try not to skip
- Make room for a walk around the block or a “water cooler” break
- More ideas in the Compassion Fatigue Toolkit ([March 2022 In-services page](#))

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Remote appts take a different kind of energy. Build in time for compassion fatigue/self care.

Breaks – do not neglect breaks. It's easy to go back –to-back with appts when done remotely. Make room for a walk around the block or to go to the watercooler and talk.

That recharge buffer is just as important when appts are done remotely.

More information on ways to support yourself and your WIC Colleagues can be found in the March 2022 Compassion Fatigue Inservice on the WIC staff resources website.

<https://www.oregon.gov/oha/PH/HEALTHYPEOPLEFAMILIES/WIC/Pages/InServices.aspx>

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