

University of Nevada, Reno
Sanford Center for Aging/Cooperative Extension
Nevada Care Connection - Single Point of Entry Training Module
Lesson Plan

Unit: Interviewing

Introduction: The Interviewing lesson is designed to train learners (trainees or interviewers) to effectively control the communication with the senior or their caregiver, successfully guide who they are interviewing through the interview process, recognize the importance of the initial interview for establishing a relationship with the client, and understanding the specifics when interviewing seniors.

Learning Overview:

- 1) Trainees will participate in a class session designed to teach interviewing techniques that are specific for working with older adults.
- 2) Trainees will engage in experiential exercises designed to simulate senior challenges during the interview process.
- 3) Role-playing through various scenarios will allow trainees to practice newly learned skills.

Unit Objectives: The trainee will develop and refine interviewing skills with a particular emphasis on serving seniors and their caregivers. Trainees will learn how to mitigate senior challenges. Exposure to skills in assessment of needs and expectations will be presented and practiced.

Anticipated Outcomes for the Unit:

- Increased skill and confidence in interviewing
- Increased awareness in senior challenges and how to mitigate those challenges
- Increasing the comfort level of seniors and caregivers during the interview process
- Decrease in stress for the senior and caregiver during the interview process

Materials:

Provided by the Facilitator:

- Lesson plan handouts (one for each trainee)
- Clipboards and pens-one set for each trainee
- Blank applications for each program discussed
- Plastic Bag with rubber gloves, candy, one straw, and cotton balls

Activities:

- Practicing of learned technique through role-playing of various scenarios
- Practice using the Geriatric Social Readjustment Questionnaire and how it predicts life stressors in the senior population.

- Practice with the Vulnerable Elders Survey as a tool for needs assessment
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LESSON:

Begin Lesson:

There are many types of information gathering interviews including patient/doctor, employer/employee, telephone surveys, and research studies. For the purpose of this training session, the intent of the interview is to gather information in order to determine social and/or health care needs, appropriate referrals, and service eligibility

Anticipatory Set:

Today we will learn how to conduct a successful interview. You will be faced with many different scenarios, with many different types of people, all with a varying and specific level of need. Learning how to conduct a productive interview is essential in the referral process because:

1. If the interview does not run smoothly, it is possible that incorrect or incomplete information will be gathered.
 2. If this happens, the referral for a particular service may be inappropriate or misguided. Important health care or social service needs may therefore not be met.
 3. Good interviewing, like good communication skills, builds rapport, which in turn builds trust. Trust by the client is essential to obtain an accurate assessment of need.
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Share the Objective:

During this meeting we will be discussing the following *factors that contribute to the interview process*:

- a) INTERVIEWING TECHNIQUES**
- b) OBJECTIVES OF THE INTERVIEWER AND INTERVIEWEE**
- c) CONTROL**
- d) MOTIVATION**
- e) SENIOR-SPECIFIC CHALLENGES**

We will also be reviewing the significance of the *initial interview* and how this assessment colors the rest of the interview process.

Each unit will include:

Input

Modeling and guided practice

Discussion and debriefing

Share the Handout(s):

- The screening instrument to be used to interview seniors, their family member or caregiver will be used during some of the interviewing exercises.
 - The Geriatric Social Readjustment Questionnaire will also be used by trainees during one of the interviewing exercises.
 - Trainees will also practice using the Vulnerable Elders Survey as a tool for needs assessment.
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Input:

Factors Contributing to the Interview Process

a. INTERVIEWING TECHNIQUES

Techniques that have been shown to be positive in terms of interviewing skill and communication with older adults are the following (Chandler, 1989):

- Direct Questioning*: Open or closed-ended inquiries
- Facilitation*: Eliciting further elaboration from the client
- Restatement or feedback*: Repetition of what the client told you
- Sensitive Silence*: Quiet or attentive interest to understand what the client is saying
- Reflection*: Expressing to the client feelings or attitudes that they have not directly stated to you that they are feeling
- Confrontation*: Verbal observation of implied information
- Clarification*: Searching for a better understanding of what the client is saying
- Summarization*: Reviewing of the significant statements made by the client

Other factors that facilitate successful interviews are a positive demeanor on the part of the interviewer and encouraging the client to talk and engage in conversation (Chandler, 1979). It is important to create a client-centered atmosphere, attentive listening, non-judgmental statements,

and make every effort for the client to feel at ease (Chandler, 1979). Finally, it is essential for the interviewer to use appropriate interview vocabulary, be attentive to the nonverbal behavior of the client, and compensate for challenges the client presents such as sensory impairment (Chandler, 1979).

Some techniques that have been identified as negative or inappropriate when interviewing older adults are the following (Chandler, 1989):

- False reassurance*
- Rejection*
- Disapproval*
- Disagreement*
- Challenging*
- Belittlement*
- Stereotypical remarks*
- Contradiction*
- Leading questions*

b. OBJECTIVES OF THE INTERVIEWER AND INTERVIEWEE

People often have multiple objectives heading into an interview process. The goal or objective of the interview may be primary or secondary both for the interviewer and for the client. When the primary or secondary objectives are in conflict, the interviewer can run into difficulty. For example:

Interviewer's Primary Objective: To elicit enough factual information to assess needs, make a referral, and determine eligibility.

Interviewer's Secondary Objective: To impress his or her employer with his ability to swiftly complete an interview.

Client's Primary Objective: To receive services.

Client's Secondary Objective: To alleviate boredom or loneliness.

The primary objectives in this instance are congruent. However, the secondary objectives are incongruent. The interviewer is seeking to complete the interview as quickly as possible where the client is looking to prolong the session as a means of having human interaction.

Discussion and Debriefing:

Begin a class discussion of some possible outcomes that could arise when objectives between the interviewer and the interviewee are incongruent.

- 1) _____

- 2) _____

- 3) _____

Input:

c. CONTROL

Either the interviewer or the client can control the communication and, thereby, the interview. Controls come in several forms (Beier, 1975):

Conscious Overt Control:

Overt control uses direct communication to control the behavior of the client. All participants are aware of the control and of what the goal is of the controller. This is the least manipulative and insidious of the controlling forms. Example: "Take it or leave it."

Conscious but hidden control:

In conscious but hidden control, the controller is aware of his/her controlling behavior but his/her goal remains hidden to his/her client. Whether the goal is of "good" or "bad" value to the client, he/she has few defenses available to them due to the covert nature of the control. "It would be in your best interest to..."

Unaware Control:

When unaware control is applied, neither the client nor the manipulator is aware of the controlling behavior. The controlling techniques are subtle but latent. Body language and simple gestures may convey a completely different message than the manipulator consciously intended. For example, flirty behavior might have this characteristic form for some.

As we move into interviewing techniques, the importance of controlling the interview will become apparent.

Guided Practice:

- With your partner, describe a time when you were manipulative or the victim of manipulation.
 - Reverse roles. Have your partner describe a time when they were manipulative or the victim of manipulation.
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Discussion and Debriefing:

1) Were you aware at the time whether or not you were controlling or being controlled?

2) If so, what type of control did you experience?

3) How did you feel shortly after this encounter?

Input:

d. MOTIVATION

There are two general motivational principles. Extrinsic and intrinsic motivations are the primary basis for adaptation to the interview process (Kahn, 1963).

Extrinsic Motivation: The motivation is a desire to sway or influence the interviewer. The respondent or client's goal in communication is to bring about the change or action he desires (Festinger, 1950). For example, a client seeking HUD housing assumes the interviewer has the authority and power to grant the application. The client will attempt to convince the interviewer of his worthiness and need for housing assistance.

Intrinsic Motivation: The client's primary objective of intrinsic motivation is a desire to establish a personal relationship with the interviewer. The

client receives gratification and satisfaction from the opportunity to communicate with the interviewer.

Motivation is not a permanent phenomenon. It can ebb and flow depending on circumstances and time. Some clients may have been “talked into” seeking services. Chances are they are more susceptible to a loss in motivation in certain circumstances. For example, a client’s son talks her into applying for food stamps. The client is quite independent and not too keen on this idea. However, the son is insistent and eventually prevails. Mom fills out an application and waits for an interview.

She waits an hour and is about to leave when her name is called. Her interviewer is in a hurry and begins by rapidly firing questions at her. After a while Mom takes umbrage and shouts, “Never mind!” and storms out. Several circumstances came into play in this scenario. Mom was not highly motivated from the beginning. The long wait was aggravating, and finally, the interviewer was brusque and insensitive. It is important that the interviewer take the time to develop rapport in order to foster motivation.

Discussion and Debriefing:

- As a class, discuss personal experiences of each motivational principle.
- Refer to primary and secondary objectives of the interviewer and client.
- Discuss how opposing motivations and objectives come into conflict.

Input:

e. SENIOR-SPECIFIC CHALLENGES

Many seniors bring challenges to the interview process. These include hearing and vision impairments, memory loss, and significant stressors such as financial concerns and loss of independence or companionship.

The Communication Lesson detailed specifics about working with seniors. Here are some strategies and tips to

use to accommodate various types of sensory loss during the interview process (Chandler, 1989):

1. Avoid stereotyping.
2. Speak distinctly, slowly, and only slightly louder but not in a higher range.
3. Avoid a monotone tone of voice.
4. Keep your face, especially your lips, visible to the client.
5. Repeat words or phrases when appropriate.
6. Keep on the same eye level as the client.
7. Minimize background noise.
8. Avoid glare lighting.
9. Position yourself directly facing the client.
10. Be aware that the client may not be able to see your nonverbal behaviors.
11. When writing, print in dark, legible, large letters, using both upper and lower cases.

Guided Practice

- Together with your partner, pour out the contents of your bag and take turns with the following activities:
- Hold the plastic bag in front of your eyes while trying to read the screening instrument (Appendix B).
- Put on the plastic gloves and try unbuttoning a piece of your clothing.
- Open the candy and place it on your tongue; try talking with your partner.
- Place the straw in their mouth and breathe through your mouth and not your nose.
- Put cotton balls in your ears and speak with the other partner.

Discussion and Debriefing

1) Someone can legally drive with the eyesight you experienced looking through the plastic bag. How would you feel behind the wheel if this was the vision you were working with?

2) What might the gloves represent?

3) What was it like trying to speak with the candy in your mouth? What might this have represented?

4) Was breathing through the straw difficult? How might this affect your daily activities?

5) What social ramifications may occur due to loss of hearing?

Input:

Stressors: For many seniors, stressors can accumulate at an accelerated rate as they age. When managing crisis situations with older adults, it is crucial to have a firm understanding of what stressful life events may have instigated the crisis experience.

The Geriatric Social Readjustment Questionnaire (GSRQ) was modeled after the Social Readjustment Rating Scale (Holmes & Rahe, 1967), however it was designed to represent the unique life events that may characterize the experience of an older adult and not necessarily a young adult. The GSRQ is used as a way to predict mental deterioration in older adults based on the intensity of the various life events they were experiencing. For example, the chance that one would lose their spouse, retire, and have some sort of sensory disability all within a short period of time is much greater for an older person than a younger person.

Guided Practice:

- Referring to the Geriatric Social Readjustment Questionnaire (Appendix C), the class as a whole, identify the life experiences that you currently are experiencing or have experienced in the past.
- Discuss with your partner what sorts of stress you have experienced as a result, and what techniques you use to alleviate that stress.

Discussion and Debriefing:

1) With your partner, discuss to what degree the Life Change Units will translate into stressors and how those stressors may in turn feed off one another.

2) As a class, discuss how this culmination of stressors might affect the way the senior or their caregiver behaves and feels during the interview.

Input:

Initial Interview

“First impressions are important determinants of the course of the entire interview...the content and process of the first few minutes of any interview determine, to a large extent, the remainder” (Pfeiffer, p.24).

In addition to first impressions, just as important are the interviewer’s behavior, appearance, expression, and posture, as perceived by the client (Pfeiffer, 1979).

To ensure a successful interview, especially if the client is distressed, the first message to be genuinely conveyed to the client needs to be of warmth, interest, and concern (Pfeiffer, 1979). Here are some tactics to establish initial rapport, as well as to calmly reassure the client that you are there to help (Pfeiffer, 1979):

- 1) A bright smile on your face.
- 2) A welcoming outreaching gesture.
- 3) Some physical contact (a handshake, an arm around the shoulder, or some other gesture of support).
- 4) A comfortable seating arrangement that doesn’t place a barrier between you and the client.

Referring to the scenario mentioned above (d. Motivation), the dynamics of the interview have been created before the interviewer entered into the picture. However, the

interviewer could have mitigated the negative circumstances by being aware of Mom's hesitancy and agitation. The interviewer could have taken time to develop rapport, made a process comment about the wait, and indicated his or her willingness to be of service.

Nonverbal body language could have conveyed a solicitous and caring attitude. A warm handshake, escorting mom down the hall instead of racing ahead could have alleviated some of the negativity of the initial interview.

Developing rapport does not consist of idle chit chat (Dyer, 1977). In Mom's case, inane comments about the weather would have created even more distance. Statements that convey the purpose of the interview build rapport. Examples of this are: "What can I do for you today," or "How can I be of assistance?"

Empathy: This term refers to understanding another's issue or problem, having compassion for their situation. Do not expect your client to make the first move in the initial interview. Rather, it is important for you as the interviewer to display your empathy; share with the client your understanding, even if it is limited, of his or her situation using referral information as well as your first observation of the client (Pfeiffer, 1979). This takes the pressure off the client for making his or herself understood.

Understanding can also be conveyed by telling the client what you notice about the way they are currently feeling; this could be anxiety, depression, stress, and let them know that there are probably good reasons for them to be feeling that way. To get the interview going, it might help to mention some common, troublesome situations that are known to affect older people in a negative way such as a change in health status or mobility, or loss of friends or relatives, or being told by their children what they NEED to do, (Pfeiffer, 1979). This technique might help the client start talking about why they are seeking services.

Assessment of client needs: Make clear to the client the importance that you have a full and complete understanding of their situation in order to provide them with the best available service. Explain that you will need as much information as possible from them to create a picture of their situation.

The client will most likely offer a presenting need or combination of needs. Determine if that is the real issue or just a symptom of a more complex situation. If a client presents with one need for service, address that need. Often a client will present a laundry list of needs. In this case, it is important for the interviewer to have firm control over the interview.

It is important, in this phase of the initial interview, that the interviewer help the client organize their thoughts in terms of precipitating circumstances and the sequence of events that led up to a change in their life thus requiring this needed service. It is helpful if the situation they describe makes sense not only to you, but to the client as well (Pfeiffer, 1979). By asking probing questions, the interviewer can assess for concurrent or future needs. i.e. need for food stamps. Is the issue economic? Are they not eating because they can no longer shop or cook? Have they lost their appetite? Are they depressed?

A simple way to assess the need for services is the Vulnerable Elders Survey (VES-13) (Appendix D). Refer to the VES-13. A score of 3 or more indicates a need for a more in-depth assessment of the client's needs. .

The next step is for the interviewer to reach an agreement with the client as to the priority of needs. By prioritizing services, the interviewer can redirect the client in order to accomplish agreed upon goals. This will save a great deal of time and keep the interview on track.

During the needs assessment process, it is important to stress the collaborative nature of solutions. The interviewer's role is to assist the client in problem solving. By emphasizing client responsibility in dealing with the issues, unrealistic expectations can be minimized.

Assessment of client's expectations: Client expectations can be limited to the provision of one service. Conversely, a number of clients will present with unreasonable expectations. If the interviewer has prepared the client to take responsibility for his welfare, unreasonable demands can be deflected back to the client.

On the other hand, seniors may believe they have only one need. It can mask other more serious needs. Many seniors

are hesitant to admit they need help, so if they do ask, they try to limit their requests.

Guided Practice:

- Choose a partner.
 - Describe in detail an occasion when you had to deal with an overly demanding client or friend.
 - Describe in detail a situation when a client or friend thought one thing would solve all their problems thus ignoring major underlying issues, i.e. if only _____ then _____.
-

Discussion and Debriefing:

To discuss with your partner:

As the conveyer of the communication:

1) How did this situation make you feel?

2) How did you handle this situation?

3) How was your relationship or perception of this person changed?

As the recipient of the communication:

1) How did you feel listening to your partner's description?

2) What other feelings or emotions came up?

Guided Practice:

Practical Application through Varied Scenarios

The ability to apply the skills learned in this training can be honed and refined with practice. Role-playing is highly regarded as a training method for conducting interviews. "Because role playing helps people to get insights into their own and others' feelings, it has been widely recognized as

a method of helping people to broaden their understanding of and to empathize with other people; to see things from the point of view of the person on the other side of the table” (Levit, 1953). Role playing allows a person to “practice” techniques, observe how others handle the same situation, and receive feedback from the role players as well as the observers.

Scenario 1:

- One class member will play the part of the 65 year old woman.
- A second class member will play the part of a service provider interviewer.
- The rest of the class will act as observers.
- Take 3 minutes to familiarize yourself with the scenario.
- Debriefing will follow the enactment.

A 65 year old woman comes into the Senior Center. She had recently relocated from the East coast. She is staying at a local motel and is having trouble finding affordable housing. She is on a fixed income and her problems are further complicated by not having transportation, and being fearful and lonely.

Scenario 2:

- One class member will play the part of an 82 year old man.
- Another class member will play the part of a service provider interviewer.
- The rest of the class will act as observers.
- Two chairs will be placed back to back and at a distance of eight feet. This will stimulate a telephone interview.
- Take 3 minutes to familiarize yourself with the scenario.
- Debriefing will follow the enactment.

You receive a phone call from a desperate, 82 year old man. He has run out of money and has no groceries. He had a large bill this month for a new prescription medicine. He feels, with his health and money problems, life is not worth living. He states he can't face any more problems in his life.

Scenario 3:

- One class member will play the part of Mom.
- A second class member will play the part of a service provider interviewer.
- A third class member will play the part of the daughter.
- The rest of the class will act as observers.
- Take 3 minutes to familiarize yourself with the scenario.
- Debriefing will follow the enactment.

A 78 year old woman comes into your agency with her daughter. The woman had been living in Utah with her son. Three weeks ago she suffered a stroke. She was recently released from rehab. Her family decided the daughter was in a better position to care for Mom than the son. The woman is now living with her daughter in Nevada where she has no friends or familiar doctors.

Scenario 4:

- One class member will play the part of a 76 year-old spry man.
- Two class members will play the part of service provider interviewers.
- The rest of the class will act as observers.
- Take 3 minutes to familiarize yourself with the scenario.
- Debriefing will follow the enactment.

A 76 year-old healthy man has been kept waiting in the lobby of a service provider. When he is finally called for an interview, he is very angry about being kept waiting.

Discussion of Objectives:

Reiterate the anticipated objectives with the class and discuss any area, concepts, or techniques that are still unclear.

Closure:

Many of the techniques we learned today require practice. With time they can be incorporated into the way you conduct interviews with older adults.

Please take the time to practice with friends, family, and fellow employees to ensure a full understanding of the concepts we reviewed and their relative importance. Successful interviewing is the next step in providing appropriate compatible care for Nevada's older adults in need.

Transition:

In these first 2 modules, we have discussed various stressors that commonly occur in the lives of older adults. Because of the nature of these stressors, the fact that they often occur simultaneously, and that many older adults can be left without some of their usual support network as a result of these stressors, the issue of crisis management is of extreme relevance and importance for this training.

Learning the skills of how to work with an older adult and/or their caregiver during a time of high stress, anxiety, and perhaps fear is essential. The CRISIS MANAGEMENT lesson of this training will examine the specifics of crisis intervention with older adults.
