

MANITOBA KEEWATINOWI OKIMAKANAK INC.

ISÉT

Indigenous Skills & Employment Training Program

Client Assessment Toolkit



Workbook & Checklist

A Guide for Conducting an Indigenous Skills & Employment Training Program Assessment

ABOUT THIS WORKBOOK?

This Client Assessment Toolkit was created by the Sub Agreement Holders, through their participation in the Communication Skills for Client Needs Assessment, Essential Skills training delivered by Workplace Education Manitoba. Their insight and commitment will continue to benefit their Clients and communities.

This workbook is designed as a guide to help ISET employees interviewing and conducting assessments to obtain and record the client's background – education levels, work experience, skills and abilities. This toolkit and the accompanying questionnaire are provided to assist in the process but are not intended to be used solely for conducting the interviews. Broader evaluation of the individual's/client's needs and background will also be required to provide the best assessment and action plan.

This workbook also provides general tips and suggestions for conducting and customizing the assessment interviews. In addition to understanding and using this workbook, ISET assessment staff will need to provide valuations of the clients' capabilities and preparedness, such as: academic level, personal life choices, goals, resilience, essential skills, awareness of available resources, ways to provide resources, success stories and budget capacity. If the client is ready they will be provided Readiness Training and Information Supports. Others could need gap training and referrals to other supports to be ready for the future.

HOW TO USE THIS WORKBOOK?

This Workbook is provided as a guide for conducting an assessment, it can be reviewed and studied prior to interviews as a preparedness learning exercise. IT IS NOT RECOMMENDED TO USE THIS GUIDE DIRECTLY AS A QUESTIONNAIRE OR FILLABLE FORM IN AN INTERVIEW. However it can be used as a checklist or report to ensure appropriate and necessary information is gathered.

ISET employees interviewing and conducting assessments are encouraged to know and understand their responsibilities and appropriate conduct during the interviews. Following the recommendations in this guide will help to ensure a positive outcome. The recommendations and guidelines in this booklet, along with the copiable tear-out questionnaires can be used and filled out as a supplement to the assessment report for each client.

WHAT YOU SHOULD KNOW?

CONSIDERATIONS WHEN WORKING WITH THIS WORKBOOK AND ISET INDIGENOUS CLIENTS

When working with clients, it is important to conduct yourself accordingly. The following suggestions will assist you. ISET Staff doing Assessments should consider:

■ Building a Rapport with the Client

- Being open when selecting (i.e. look past barriers to find strategies and solutions)
- Being objective/neutral when selecting (i.e. do not just select family)
- Be well prepared
- Show that you are interested, you care, and that your client really matters
- Get to know clients on a personal/professional level.
- Share past experiences
- Make it more of a conversation and less of an interview
- Offer beverages or a snack
- Bring in humour and laughter
- Make your office feel less sterile and more open
- Give clients undivided attention
- Smile
- Use excellent customer service
- Be understanding
- Listen closely
- Use a friendly tone of voice
- Use eye contact
- Show genuine interest
- Have open and friendly body language
- Reassure them that this is a safe place; things said stay in the office
- Respect confidentiality and privacy

- Look presentable and professional
- Be patient
- Ask about their needs
- Use ice breakers to make you both comfortable, (e.g. Small talk)
- Use friendly greetings like, "What can I help you with today?"
- Be empathetic, and sympathetic to their needs
- Ensure you have a solid understanding of their needs
- Be sure to have their undivided attention – eye contact, listen
- Shake hands
- Provide emotional or mental support – if required
- Provide leadership, mentorship and knowledge of their questions
- Be motivational, positive and encouraging
- Provide resources they need
- Reserve judgements and avoid criticism
- Get direct feedback – in their own words

■ Ensuring You Get Informed Consent

Ensure that you client understands rights, responsibilities, and potential repercussions from various courses of action. Partner with your clients to gather additional information and to make appropriate referrals.

- Authorization (signature on forms)
- Confidentiality from PIF
- Consent to release personal information
- Be responsible about guidelines regarding sponsorship, training and attendance
- Submit attendance record – if not no allowance
- Provide peer-to-peer counselling
- Provide information sessions and website resources
- Emphasize the importance of confidentiality
- Provide orientation
- Get or provide referrals
- Determine requirements
- Go through the rights and responsibilities with the them
- Have them read the outline and write down information (to increase comprehension and assess literacy)
- Explain the significance and importance of a signature
- Explain the expectations of the school that they are going to
- Provide Translator – as needed
- Know the forms and programs – be prepared
- Give an Orientation and ensure due diligence
- Go through the consequences (if they default on a signed contract)

■ Being Observant

Clients may not ask for what they really need because they simply don't know what they're missing. Watch for cues that indicate an issue.

- Be sure to understand what they are saying and not saying
- Ask probing questions
- Create an environment with minimal distractions

- Watch body language for emotion
- Watch for nervous behaviour
- Watch for indicated areas of interest
- Ask generalized question to narrow the field
- Determine their willingness to learn / attitude
- Determine their Interests
- Develop effective job coaching / employment plans
- Ask questions

■ Being Holistic in the Approach

Recognize that people are impacted very differently by situations and circumstances that, on the surface, look the same. Consider the interconnection of stressors and supports, capacity and challenges, when determining what help may be needed.

- Ask questions to determine if Counselling may be required
- Play out possible scenarios
- Look at the whole being of the client
- Be understanding of their beliefs, religion, sexual orientation
- Consider emotions in interactions with client
- Ask probing questions to gage strong suits and weaknesses
- Offer supports / resources
- Be respectful
- Be open minded
- Avoid labelling
- Help client move from their comfort zone
- Recommend healthy ways to cope with stress (Eg. Yoga etc.)
- Send them out of town for a type of training similar to their needs to help them network
- Promote equality and fairness
- Reserve judgement
- Offer cultural programming
- Help them find alternative methods of doing things
- Work on a plan B (back up plan)
- Beware of triggers

■ Making Effective Notes

To make the assessment efficient, create your own shorthand – use key words, abbreviations, acronyms, and / or diagrams. Reflect on them right after the session and expand as required to create more comprehensive notes and reports.

- Make notes – create a work plan
- Use sticky notes / post-its
- Consider webbing charts
- Use diagrams / branch diagram
- Use emojis
- Use consistency
- Create mind maps
- Offer brainstorming
- Use easy to understand short-hand writing

- Make reminders of what was discussed
- Use calendar reminders
- Develop your own check-list tool eg. Well-being wheel, goal setting schedule to identify barriers
- Review minutes of meetings
- Be prepared (stationary, pens, papers)
- Use tools such as the internet or calendar
- Ensure readable penmanship
- Colour code your notes
- Split papers into pros / cons lists while client is speaking
- Use T-charts
- Have premade charts and check them off as you go
- Document forms/reports on your computer
- Use abbreviations of institutions
- Use premade templates

■ Being Efficient

Time is limited but it's ultimately quicker to get things done "right" the first time rather than having to repeat the process. Quickly review existing forms and files so that you are filling in gaps rather than reinventing the information.

- Complete needs assessment in ARMS
- Keep constant communication with academic advisor, institution
- Prioritize your daily tasks
- Keep proper record keeping
- Set up your calendar
- Know your job
- Know your forms
- Know the end goal
- Update client file, notify client of any changes and requirements
- Use effective time management
- Ensure effective file management
- Touch base / follow-up
- Follow deadlines – be ahead of deadlines
- Practice / review paperwork before they leave
- Have / create action plan
- Make sure you are prepared for walk-ins – extra paper for writing notes, blank forms, know what funds / programs are currently available
- Keep meeting with clients
- Be organized
- Get someone to double check your work
- Avoid wasting materials and funding

■ Helping Clients to Adapt to Organizational Culture

When clients move to new locations for either school or work, they are needing to adapt to culture. The new community and the organization will both have different cultural elements.

People can lose their jobs or fail in education programs if they are unaware of some "unwritten rules". Therefore, finding out these rules is key to success.

How can clients find out about these "unwritten rules"?

- Ask people. Others often have supportive information.
- Get a mentor. If the organization does not offer one, find one on your own.
- Google it! Online resources are very useful.
- Observe what other people are doing.
- Expect that information will need to be repeated.



MANITOBA KEEWATINOWI OKIMAKANAK INC.

ISET

Indigenous Skills & Employment Training Program

ISSET CLIENT ASSESSMENT CHECKLIST

This checklist should be completed for each assessment. This list when completed will ensure thorough information is gathered and allow for a detailed plan to be put in place that meets the client's individual and unique needs, while overcoming foreseeable obstacles or barriers in their goal path.

- ☐ Ensured all forms are completed correctly
- ☐ Got consent to release personal information
- ☐ Asked about goals, career, education
- ☐ Checked their documents are valid, accurate and complete.
- ☐ Discussed their rights and responsibilities
- ☐ Ascertained their level of commitment and dedication to the program.
- ☐ Defined their past work history/experience/education
- ☐ Explored travel options available to them
- ☐ Received criminal background checks (Criminal and child abuse.) If they have a criminal record, ask if they could get a police officer to write a letter of recommendation.
- ☐ Identified certificates such as First Aid/CPR
- ☐ Received a Resume? or do they need support? Do they need a resume workshop?
- ☐ Do they need help with getting proper ID's
- ☐ Evaluated literacy skills (i.e. ability to read and write)
- ☐ Assessed public speaking skills
- ☐ Evaluated punctuality
- ☐ Recorded current income levels
- ☐ Asked about accommodations needed for disabilities
- ☐ Recorded client's general information/facts (i.e. Name, DOB, SIN, # dependants, citizen)
- ☐ Asked about goals/interests (i.e. graduation, employment, promotion)
- ☐ Reviewed steps in the ISET process
- ☐ Illustrated a visual map for their path to success
- ☐ Reviewed eligibility - Section 25, (EI eligibility)
- ☐ Filled out PIF forms
- ☐ Determined minimum grade required for program
- ☐ Obtained acceptance letter
- ☐ Reviewed Chief and council (selection committee)
- ☐ Reviewed appeal process if client was denied
- ☐ Created a flowchart – process of intake – PIF, intake forms
- ☐ Gained knowledge of their history to better guide and inform them
- ☐ Prepared information packages/kits
- ☐ Outlined and recorded timeframe, deadlines and milestones
- ☐ Obtained client's proper ID and got consent for photo
- ☐ Checked if they need help filling out forms
- ☐ Addressed any questions
- ☐ Determined client's education level
- ☐ Reviewed program cost (budget)
- ☐ Met program requirements (CRF/EI)
- ☐ Checked Availability
- ☐ Determined how many can be sponsored
- ☐ Determined client's needs for child care
- ☐ Listed client's challenges or barriers (i.e. Remoteness, language, identification, culture shock, addictions)
- ☐ Guided and clearly explained assessment and process

GENERAL CLIENT INFORMATION

Name: _____

Address: _____

Apt./P.O Box: _____ Postal Code: _____

Phone #: _____ SIN#: _____

Email: _____ Status ID: _____

Birth date: _____ # of dependants: _____

PLEASE MARK BOXES WITH AND "X" AND FILL IN APPLICABLE INFORMATION ON THE LINES PROVIDED

ELIGIBILITY

1. What level of education do you have?

- ☐ None
- ☐ Grade school Gr. _____
- ☐ Highschool Gr. _____
- ☐ College/University _____
- ☐ Diploma/Degree _____
- ☐ PH D _____
- ☐ Other _____

What is your current income level?

- ☐ None
- ☐ \$1,000 to \$10,000
- ☐ \$10,000 to \$20,000
- ☐ \$20,000 to \$35,000
- ☐ \$35,000 to \$75,000
- ☐ \$75,000 to \$110,000
- ☐ Other _____

2. What is your employment history and current status? (to determine EI status / eligibility)

3. What kind of training do you already have?

4. Have you completed post-secondary? If no, which courses?

5. What sources of funding do you have?

6. Do you have any disabilities? _____

PREPARATIONS

1. What steps have you taken so far towards your training, skills or employment?

2. Have you applied at a school? ☐ Yes If "yes" which school _____

☐ No

3. What program(s) have you applied for in the past? _____

4. How confident are you in completing the applications before the deadline?

On a scale of 1 – 10? circle answer

not at all 1 2 3 4 5 6 7 8 9 10 very confident

5. Did you do any research about topic (s) of study? The courses? _____

6. Do you have an acceptance letter? ☐ Yes If "yes" from where _____

☐ No

7. Did you do research on the indigenous programs available at the school?

☐ Yes If "yes" which school _____

☐ No If "No", would you be willing to do more research _____

8. Have you contacted the post-secondary counsellor or academic advisor?

☐ Yes If "yes" please name _____

☐ No

9. What steps have you taken towards your career goals? _____

10. What preparation have you made to meet your family needs? Child care? Etc.

11. Do you training in First Aid, CPR or other? ☐ Yes Specify _____ ☐ No
12. Have you researched any other funding options? ☐ Yes If "yes" from where _____
☐ No
13. Do you know if there is a First Nations guidance counsellor at the school you want to go to?
☐ Yes If "yes" what is their name(s) _____
☐ No
14. Have you done a criminal record / child abuse registry check? ☐ Yes ☐ No
15. How do you plan to get around? _____
Do you have your driver's license? ☐ Yes If "yes" what class license _____ ☐ No
Do you have a car/vehicle? ☐ Yes ☐ No
Do you have other transportation options? ☐ Yes ☐ No
16. Have you found accommodations options? ☐ Yes ☐ No
If "yes" where _____

MOTIVATIONS

1. If applicable, what made you decide to go to post-secondary training or school? _____

2. What are the top 3 reasons why you want to return to school/training?

3. On a scale of 1 to 10, how ready are you to return or start school/training?
Circle answer
not at all 1 2 3 4 5 6 7 8 9 10 very confident
- Why do rate yourself at that number? _____

4. What training/school, course(s) are you considering? _____
What is it that made you consider or like this choice? _____

5. What kind of other interests do you have? _____

6. If you have taken other courses or training, why did you apply for that course? _____

7. What motivated you toward this goal? _____

8. If there are not training dollars, are you willing to be deferred to next year if you re-apply? ☐ Yes ☐ No If no, reason why it is urgent _____

9. Can I see about referring you to a different funding source? ☐ Yes ☐ No

10. When was the last time you worked? Date: _____

Can you share what you were doing when not working? _____

11. What made you decide to come today? _____

12. Are you prepared to take on this challenge? ☐ Yes ☐ No

SUPPORTS

1. What kind of supports do you have? (i.e. friends and family) _____

2. Have you arranged for housing/childcare? ☐ Yes If "yes" from where _____

☐ No

3. Do your family/friends support your decision to find training/work?

☐ Yes ☐ No If "no" why not? _____

4. Are you ready to leave your community, if necessary? ☐ Yes ☐ No

What have you done to prepare yourself for the possibility of moving from your community? _____

RESILIENCE

1. If you have multiple academic deadlines coming, how would you manage them or deal with the stress? _____

2. Can you handle a full course or workload? ☐ Yes ☐ No

If "yes" what makes you think you can handle a full course/work load? _____

3. How do you intend to handle the stress of a full course/work load? _____

4. Were you previously employed? ☐ Yes ☐ No

If "yes" why did you leave your previous employment? _____

5. Do you think you'll be able to be away from your home community for a long period of time? ☐ Yes ☐ No

6. How do you handle pressure / stress? What do you do to relax? How do you think you will handle stress when you are away? _____

7. Do you commonly socialize with friends or family when not at work or training/studying?

☐ Yes ☐ No

Are friends/family ever a distraction? ☐ Yes If "yes" why or how _____

☐ No

7. Do distractions affect your study/work? ☐ Yes ☐ No

How do you handle the distractions? _____

8. What do you know about culture shock? _____

CURRENT COMMITMENTS OR BARRIERS TO OVERCOME

1. What commitments do you have or barriers do you face?

☐ Childcare ☐ Funding ☐ Travel Other _____

2. Do you have plans in place for these? ☐ Yes ☐ No

READINESS AND BUDGETING EXPENSES

1. Have you done a personal budget plan or tracked your finances? ☐ Yes ☐ No
2. Are you prepared to work on a budget and plan your expenses? ☐ Yes ☐ No
If "no" why not? _____
3. If your training, school or job requires relocation, are you prepared for potential culture shock of a new city/community? ☐ Yes ☐ No
What have you learned to prepare for this? _____

What do you think you might need to help avoid or reduce culture shock? _____

4. What experience with budgeting do you think you have to help you to obtain your goal(s)? _____

5. Did you apply for subsidies for daycare? ☐ Yes ☐ No
6. Do you have a personal bank account? ☐ Yes ☐ No
If yes, would you say you manage your money well on your own? ☐ Yes ☐ No
7. Do you know your way around the city/community you are going to be training/working in yet? ☐ Yes ☐ No
If "no" why not? _____

COMMITMENT, VISION AND GOALS

1. Are you prepared to work/train or take courses over the summer when school is out? ☐ Yes ☐ No
If "no" why not? _____
2. Are you prepared to upgrade if needed? ☐ Yes ☐ No
What are you willing to do? _____
3. Where do you see yourself in 5 years? _____
4. What kind of training/employment do you want? _____
5. Complete this comment "You will consider you've reached your goals if" _____



MANITOBA KEEWATINOWI OKIMAKANAK INC.

ISET

Indigenous Skills & Employment Training Program



Manitoba
Keewatinowi
Okimakanak Inc.