

Rubric for Assessment and Counseling Skills

MAY 2023

Name of Staff: _____ Name of Reviewer: _____ Date: _____

Local WIC agencies may use this tool to provide concise feedback to WIC CPA staff regarding nutrition assessment to promote continued Participant Centered Service (PCS) skill development. In each section, there is a list of desired skills to observe, with the skill levels building from beginning to advanced. This tool can be used along with the observation form during annual CPA monitoring or anytime throughout the year to assess PCS skill levels among CPAs.

Setting the Stage/Family Information

Sets the stage in a PCS manner at the beginning of the appointment to help participants better understand the purpose of the components of the WIC appointment.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills:</p> <ul style="list-style-type: none"> ▪ Greets participant/introduces self ▪ Sets agenda ▪ Explains the purpose 	<ul style="list-style-type: none"> <input type="checkbox"/> Greets participant <input type="checkbox"/> Introduces self 	<ul style="list-style-type: none"> <input type="checkbox"/> Introduces self <input type="checkbox"/> Greets participant by name <input type="checkbox"/> Introduces self and role <input type="checkbox"/> Reviews previous alerts/notes after starting the appt 	<ul style="list-style-type: none"> <input type="checkbox"/> Greets participant and introduces self in a friendly, welcoming manner with a smile <input type="checkbox"/> Sets the agenda (indicates what will happen at appointment, provides anticipated length of the appointment) <input type="checkbox"/> Reviews previous documentation before starting the appointment 	<ul style="list-style-type: none"> <input type="checkbox"/> Greets participant in a welcoming manner, using respectful, inclusive language <input type="checkbox"/> Sets the agenda in the spirit of PCS (invite questions and feedback, explain appointment process and purpose, including why we review documentation)

Comments:

Nutrition/Breastfeeding Assessment

Utilizes critical thinking skills to gather, analyze, evaluate, and prioritize the assessment to identify participant concerns.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills:</p> <ul style="list-style-type: none"> ▪ Appropriate mix of open/closed ended questions ▪ Conversational and personalized assessment ▪ Probing questions ▪ Reflections ▪ Focuses on participant rather than computer 	<ul style="list-style-type: none"> ☐ Beginning use of assessment skills <ul style="list-style-type: none"> ▪ Uses a few open-ended questions ▪ Collects data by directly reading questions from Nutrition Assessment tab or ABCDE sheet ▪ Focuses on the computer and process rather than the participant ☐ Completes minimal assessment 	<ul style="list-style-type: none"> ☐ Occasional use of assessment skills <ul style="list-style-type: none"> ▪ Uses some open-ended questions with opportunities to use more ▪ Begins to tailor assessment with a few probing questions ▪ Begins using some simple reflections ▪ Focus is split between the participant and computer ☐ Completes basic assessment 	<ul style="list-style-type: none"> ☐ Frequent use of assessment skills <ul style="list-style-type: none"> ▪ Uses appropriate mix of open- and close-ended questions ▪ Assessment follows ABCDE and flows smoothly ▪ Actively listens to participant with appropriate probing questions and reflections ▪ Uses probing questions to clarify potential risks and get complete information ▪ Focuses primarily on the participant and actively engages with the participant ☐ Completes full assessment 	<ul style="list-style-type: none"> ☐ Assessment skills are fully integrated into the appointment. The CPA skillfully collects, clarifies, and synthesizes relevant information. <ul style="list-style-type: none"> ▪ Asks open-ended questions frequently ▪ Tailors the assessment through wording and order of questions. The assessment flows seamlessly and is conversational, using ABCDE as a guide. ▪ Focus is fully on the participant ☐ Completes comprehensive and individualized assessment

Comments:

Nutrition/Breastfeeding Discussion

Offers appropriate, relevant, and accurate counseling and education.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills</p> <ul style="list-style-type: none"> ▪ Completes nutrition assessment prior to providing education ▪ Education and education materials tailored to participant's needs and interests ▪ Participant-centered discussion ▪ Explore-offer-explore ▪ Affirmations ▪ Asking permission ▪ Anticipatory guidance 	<ul style="list-style-type: none"> ☐ Provides education early, before adequate assessment of the situation is complete ☐ Offers education in a didactic manner (as an authority telling the participant what they should do) ☐ Offers information based on assessment and risk factors ☐ Selects topics for education and education materials 	<ul style="list-style-type: none"> ☐ Provides some education before assessment is complete ☐ Begins to offer education in a collaborative way ☐ Offers information based on assessment and risk factors, while considering participant's interest and readiness for change ☐ Offers general anticipatory guidance based on ages/stages 	<ul style="list-style-type: none"> ☐ Offers education in a collaborative way after assessment is complete, considering interests and cultural practices ☐ Offers general anticipatory guidance based on assessment and participant's situation/development ☐ Offers written materials that supplement verbal education and are personalized to the individual needs ☐ Asks permission before sharing information about a topic initiated by the CPA 	<ul style="list-style-type: none"> ☐ Tailors discussion and education around participant's needs and interests in the spirit of PCS (using OARS: open-ended questions, affirmations, reflective listening, summary reflections) ☐ Uses explore-offer-explore ☐ Education builds on cultural or social norms and recognizes strengths

Comments:

Support Health Outcomes

Guides the participant toward improved health outcomes through incremental behavior change by breaking goals into small, achievable action steps.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills</p> <ul style="list-style-type: none"> ▪ Goal setting ▪ Desired behavioral change or outcome ▪ Recognizing stages of change 	<ul style="list-style-type: none"> <input type="checkbox"/> No goals were identified <input type="checkbox"/> Sets the goal for the participant or tells them what they should change 	<ul style="list-style-type: none"> <input type="checkbox"/> Behavioral goal primarily determined by CPA based on assessment <input type="checkbox"/> Suggests goal for the participant <input type="checkbox"/> Begins to recognize participant's stage of change 	<ul style="list-style-type: none"> <input type="checkbox"/> Summarizes the discussion <input type="checkbox"/> Asks participant about next steps and helps guide goal setting. CPA may offer ideas, but the final decision is left up to the participant <input type="checkbox"/> Works with participant to achieve small progressive action steps towards positive health outcomes. <input type="checkbox"/> Tailors language around guiding goal setting; uses words other than 'goal' as appropriate <input type="checkbox"/> Recognizes and adjusts their approach based on the stages of change <input type="checkbox"/> Sets up topics for next appointment for follow-up 	<ul style="list-style-type: none"> <input type="checkbox"/> Effectively transitions from education to summarizing the discussion to goal setting. <input type="checkbox"/> Uses the summary and asks appropriate open-ended questions to get at desired behavior change. <input type="checkbox"/> Recognizes participant's stage of change and incorporates into discussion.

Comments:

Overall Use of PCS Skills

Integrates PCS skills into all aspects of the appointment to ensure the focus on topics and issues are relevant to the participant, putting the participant’s needs at the core of WIC services and focusing on the participant’s specific capacities, strengths, and developmental needs. When appropriate, engage other persons present. The [WIC Nutrition Assessment](#) and [WIC PCS Skills and Resources](#) webpages provide materials to further enhance understanding of the PCS skills.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills</p> <ul style="list-style-type: none"> ▪ OARS (open-ended questions, affirmations, reflective listening, summary reflections) ▪ Pulling PCS skills together and using skills to provide person-centered experience ▪ Balancing appointment requirements with the participant’s conversational style 	<ul style="list-style-type: none"> <input type="checkbox"/> Uses limited to no OARS skills <ul style="list-style-type: none"> ▪ Open-ended questions ▪ Affirmations ▪ Reflective Listening ▪ Summary Reflections <input type="checkbox"/> Talks a majority of the time without giving participant time to reflect and respond 	<ul style="list-style-type: none"> <input type="checkbox"/> Uses some OARS skills <ul style="list-style-type: none"> ▪ Open-Ended Questions ▪ Affirmations ▪ Reflective Listening ▪ Summary Reflections <input type="checkbox"/> Allows the participant time to respond 	<ul style="list-style-type: none"> <input type="checkbox"/> Uses OARS skills frequently <ul style="list-style-type: none"> ▪ Open-ended questions ▪ Affirmations ▪ Reflective Listening ▪ Summary Reflections <input type="checkbox"/> Allows pauses/time for participant to reflect and respond <input type="checkbox"/> Uses reflective listening to confirm understanding 	<ul style="list-style-type: none"> <input type="checkbox"/> Uses OARS skills consistently throughout appointment <ul style="list-style-type: none"> ▪ Open-ended questions ▪ Affirmations ▪ Reflective Listening ▪ Summary Reflections <input type="checkbox"/> Uses OARS skills in conversational manner to personalize the contact <input type="checkbox"/> Comfortable with silence, allowing participant time to think

Comments:

Culture and Interpreter Use

Considers cultural practices, attitudes, and beliefs of the participant and appropriately incorporates them into the appointment. For more information about cultural awareness, you may view the Introduction to Cultural Competency and Humility module available through the [Wisconsin Center for Public Health Education and Training](#).

Manages the conversation well when using an interpreter; phrases things in an easy to interpret way, introduces self to the interpreter, orients interpreter ahead of time and lets them know what the expectation is, and prevents the interpreter from telling the participant what to do or sharing personal advice. The [Working with Interpreters](#) webpage contains training materials and helpful tips.

Action	Beginning	Developing	Effective	Advanced
<p>Desired skills</p> <ul style="list-style-type: none"> ▪ Considers cultural practices of participant and how they may affect dietary decisions ▪ Interpreter is used appropriately ▪ CPA uses interpreter skills to effectively communicate through the interpreter: Uses plain language, avoids jargon, speaks in brief segments/phrases, pauses after each thought to allow time for interpreter to translate, speaks at an even pace and tone in relatively short segments 	<ul style="list-style-type: none"> <input type="checkbox"/> Offers interpreter, explains that the interpreter is confidential and offered at no cost <input type="checkbox"/> Uses trained interpreter (i.e., did not use inappropriate family member (e.g., child) or no interpreter when needed) <input type="checkbox"/> Beginning use of interpreter skills <input type="checkbox"/> Directed conversation to the interpreter, using third person pronouns (i.e. “ask her if...”) <input type="checkbox"/> Allows interpreter to respond for participant <input type="checkbox"/> Recognizes cultural differences 	<ul style="list-style-type: none"> <input type="checkbox"/> Asks permission to use interpreter <input type="checkbox"/> Occasional use of interpreter skills <input type="checkbox"/> Begins speaking directly to the participant and using first person pronouns (i.e. “what do you...”) <input type="checkbox"/> Begins to exhibit cultural competence (ability of an individual to understand and respect values, attitudes, beliefs, and customs that differ across cultures) <input type="checkbox"/> Responds to cultural differences, avoiding stereotyping/generalizing 	<ul style="list-style-type: none"> <input type="checkbox"/> Frequent use of interpreter skills <input type="checkbox"/> Talks directly to the participant rather than the interpreter, when in-person makes eye contact with participant if culturally appropriate <input type="checkbox"/> Mostly exhibits cultural competence (ability of an individual to understand and respect values, attitudes, beliefs, and customs that differ across cultures) <input type="checkbox"/> Aware of cultural differences while still recognizing that participants are individuals 	<ul style="list-style-type: none"> <input type="checkbox"/> Fully uses interpreter skills <input type="checkbox"/> Fully engages participant by speaking directly to them rather than addressing interpreter <input type="checkbox"/> Exhibits interpreter skills from effective column (uses skilled interpreter, talks directly to the participant) <input type="checkbox"/> Fully exhibits cultural competence (ability of an individual to understand and respect values, attitudes, beliefs, and customs that differ across cultures) <input type="checkbox"/> Participant is engaged and responsive

Comments:

Reference – Complete Listing of Hyperlinks

[WIC Nutrition Assessment](https://www.health.state.mn.us/people/wic/localagency/training/na.html) (<https://www.health.state.mn.us/people/wic/localagency/training/na.html>)

[WIC PCS Skills and Resources](https://www.health.state.mn.us/people/wic/localagency/training/pcs/skills/index.html) (<https://www.health.state.mn.us/people/wic/localagency/training/pcs/skills/index.html>)

[Wisconsin Center for Public Health Education and Training](https://wicphet.org/content/cultural-awareness-series) (<https://wicphet.org/content/cultural-awareness-series>)

[Working with Interpreters](https://www.health.state.mn.us/people/wic/localagency/interpreters.html#NaN) (<https://www.health.state.mn.us/people/wic/localagency/interpreters.html#NaN>)

Minnesota Department of Health - WIC Program 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us. To obtain this information in a different format, call: 1-800-657-3942.

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