Motivational Interviewing: Certification Program Workbook

HealthyLifetime®

Comparing 2 Approaches

Approach #1

Step 1: Decide with your partner who will be "participant" first and who will be "practitioner" first during this Approach #1

Instructions for participant:

- Be yourself. This is NOT a role play.
- Think of a health-related issue that you know you "should" be doing but you are not, or at least not consistently doing. This is something that isn't too emotional to share but also that is important enough to matter. Examples: eating more healthy, exercising more, getting more/better sleep; doing your PT exercises, following a treatment plan, quitting smoking, managing stress better, losing weight, etc.
- During the session with your partner, note how you feel with this approach. Does your motivation go up or down? How about your resistance to change? Respond as you normally would at a health clinic or doctor's office.

Instructions for practitioner:

- Facilitate a 7-8 min session with your "participant"; you may want to set a timer
- Feel free to use and look at this handout as a guide
- Your overall approach is to directly assess, prescribe and fix as many practitioners do in traditional participant education – this is NOT motivational interviewing
- Find out what the issue is and then ask the following questions/give this information:
    - Explain *why* they should be doing (or stopping) the behavior
    - Give at least three *benefits* that would result from following through
    - Give advice about *how* to do it; in other words, give them a plan
    - Convince the participant about how *important* it is to follow through
    - Get consensus about the plan – ideally, you want them to agree to do it

Step 2: After the 7-8 minute session, switch places and follow the instructions above again

Approach #2

Step 1: Decide with your partner again who will be "participant" first and who will be "practitioner" first during the Approach #2

Instructions for participant:

- Again, be yourself – no role play
- Please use the exact same issue as you did before
- Forget your first session ever happened and forgive your partner if they were too directive (they were just following instructions) ☺
- During the session with your partner, note how you feel with this approach. Does your motivation go up or down? How about your resistance to change? Respond as you normally would at a health clinic or doctor's office.

Instructions for practitioner:

- Facilitate a 7-8 min session with your "participant"
- Feel free to use and look at this handout as a guide
- Your overall approach is to collaborate and evoke
- Ask these questions. Listen to your participant's responses with the goal of understanding. Try not to give any advice.
    - What is the reason that you picked this topic? (Listen) What else?
    - How important is it for you to start [quit] doing this behavior?
    - If you did decide to do this, how would your life be different and better in 6 months?
    - It's up to you if you decide to do this, but how would you go about getting started if you did?
    - Give short summary/reflection of speaker's motivation
    - End with a question (appropriate for your conversation and the participant's readiness to change) to assess next steps: "So what do you think you'll do?" or "Where does this leave you?" or "What is your first step?" or "What do you need to do to prep for your plan?"
- Listen with interest and provide an affirmation; e.g., why you think they would succeed if they try and make this change

Step 2: After the 7-8 minute session, switch places and follow the instructions above again

Step 3: See the review questions below. Go back into your MI program Module 1, use the left navigation pane to go to "Activity Break: Compare 2 Approaches" at the end of the module. Then submit your responses. Remember that you are welcome to discuss the questions with your partner; however, each of you are expected to submit your own response. These responses are not expected to be more than a paragraph each.

Review Questions:

1. From your "participant" experience during the activity, compare and contrast the two approaches.
2. From your "practitioner" experience during the activity, compare and contrast the two approaches.

Batting Practice

Step 1: With your partner, brainstorm typical scenarios where you hear ambivalence about a lifestyle change or non-adherence to a treatment plan from your participants (or where you might expect to if you haven't started coaching participants yet)

Step 2: Choose 3-4 of these scenarios and write out a statement for each one; i.e., what your participant would actually say in quotation marks

Here are 2 examples of the type of statements that you should be creating.

- "I get that I'm supposed to be taking my medication but I'm having a hard time paying all my copays. I have to eat and pay my bills."
- "All the medical folks are telling me that I should get this vaccination, but I've heard that it could have bad side-effects and that I could still be passing on the virus. It's just so confusing."

Step 3: Take turns reading ("pitching") your participant statements to the other – who becomes the "batter". The batter comes up with a validating response; one that allows the participant to feel heard and understood. Feel free to discuss possible responses with each other. Once you have come up with a validating response, you are done with that statement and on to the next.

- Litmus test: how would the participant most likely respond to the statement? Discord or sustain talk? Try again! Shoulders up or down? If the participant is willing to keep talking with you, it was a successful response and you can move onto the next one!
- Tip: if you have asked a question, that would not be considered a validating response – asking evocative questions come afterwards. Let's pause and hear the participant's story first and let them know that we understand their perspective.
- Tip: remember that this isn't the end of the conversation but just a great way to start it. Right now we are practicing the art of engaging effectively and efficiently before we explore, focus or solve the issue.

Review Questions:

1. How did you do as "batter"; i.e., responding to the participant statements? What was most challenging for you?
2. What insights or tips did you and your partner learn about what worked well to help the participant's shoulders go down; i.e., to craft a validating response that engaged quickly?

Giving Advice or Information

Step 1: Before your activity, review the program section on Giving Information or Advice, especially the Elicit-Provide-Elicit and Menu of Options strategies.

Step 2: With your partner, create a scenario that meets the criteria for WHEN to offer advice/info. Here are some examples of the kind of scenario you should select:

- There's information that would be helpful for the participant to know but, being MI-congruent, you want to find out first what they already know; or
- The participant asks for/clearly wants information/tips; or
- The participant knows this change is important but is obviously stuck on how to get started or what to do to get un-stuck

Step 3: Decide who will be participant and practitioner first

Step 4: Important: the participant should agree to be a "cream puff" (pleasant, nice and engaged!) to allow for supportive practice for your partner as they are practicing a new skill

Step 5: The practitioner starts in the middle of the scenario you created – near the point that it makes sense to give advice or information – and practices using either the Elicit-Provide-Elicit or Menu of Options strategy (or if you are ambitious, you could use both – the menu of options would be the "Provide" part of the E-P-E steps)

Step 6: Switch places and go again so you both get to practice the strategy

Review Questions:

1. When you were practitioner, what scenario and strategy did you decide to use and why?
2. How did this activity go for you and how comfortable would you feel using it with a participant during a session?

MODULE 3: ENGAGING

Listen with Empathy

Step 1: Each of you should think of a personal topic that you can discuss where you will have some animation/emotion. Stay clear of overly-charged topics such as politics!

- Examples of potential topics:
  - A difficult or unpopular decision I once made …
  - A popular belief about health that I disagree with …
  - The worst/unluckiest vacation I ever took …
  - The funniest thing that one of my kids did …
  - A fight with a friend back in school that now is funny …
  - The worst neighbor in the neighborhood …
  - The most favorite thing that you ever bought yourself …

Step 2: With your partner, decide who will be "Speaker" or "Listener" first.

Step 3: The first Speaker sets a timer and spends 3 minutes describing the experience/topic that they selected. The Listener's task is to completely focus on the Speaker and let them know that they are listening and understand. They can comment or ask questions but the spotlight should be completely on the Speaker and their point of view – not about what the Listener thinks and feels about the topic.

Step 4: Switch places and repeat instructions above.

Review Questions:

1. How did it feel to be listened to with complete attention for 3 minutes? How did you know your partner was listening and understanding you?
2. How did it feel to be the Listener? Did you want to interject your own experiences and opinion? If you had done so, how might it have changed the interaction and experience of the speaker?

Practicing Your Reflections

Step 1: With your partner, decide who will be Participant or Practitioner first.

Instructions for Participant:

- This is NOT a role play. Please identify a real lifestyle management issue – something that you would like to be doing better or more of.
- Set a timer and discuss your issue with your partner for 7 minutes.
- Be sure to support your partner as they may need extra time to think of reflections; i.e., be relaxed and act natural about any long pauses.

Instructions for Practitioner:

- The objective of this activity is to practice your reflective listening.
- It's totally fine to ask questions; however, try defaulting to a reflection before you ask a question (except at the very beginning where it makes sense to ask an evocative question to get started).
- As you get more comfortable with the process, try to use reflections that add significant meaning (what are emotions your partner might be feeling? what is the "so-what" of their situation?) rather than merely repeating back or parroting what they said.
- When your partner calls "Time", try to end with a nice mini-summary that captures both sides of their ambivalence – first with the barriers and challenges they are facing, and last with their motivations for change, steps they are already taking, or their plan of action (if they provided).

Step 2: Switch places and repeat instructions above.

Review Questions:

1. What was your experience as practitioner in this activity? As participant?
2. What type of reflections do you think you used most often: simple (parroting back) or complex (adding significant meaning or feeling)? If you used mostly simple reflections, what do you think would help you move into more complex ones?
3. Thinking back on your discussion, did your partner express ambivalence about the behavior change – both sustain talk (challenges or barriers) and change talk (motivation for change, steps that were taken or might take)? If so, try and craft a double-sided reflection – you may need to look back at the slide on this topic for assistance.

MODULE 4: FOCUSING

Focusing and Guiding

Step 1: With your partner, decide who will be Participant or Practitioner first.

Step 2: Brainstorm a good scenario with your partner so that you can use the Agenda Mapping strategy. This means that you want a scenario where there are multiple risk factors, gaps in care, or treatment options. Keep your scenario simple and straight-forward.

Instructions for Participant:

- This WILL be a role play. Please be a "cream puff" (pleasant, nice, engaged, very easy to work with) as your partner is practicing a new skill.
- Help your partner if they get stuck; this is an informal practice session.

Instructions for Practitioner – **AFTER** engaging for a few minutes:

- Step 1: Structuring
    - Ask for permission to go through process of selecting a focus for your discussion (either formally or informally).
    - Support the participant's autonomy while providing guidance.
- Step 2: Considering options
    - Use clinical expertise to guide participant towards most critical areas if some are more important to health than others – you can be very transparent about this while still supporting their choice.
    - Elicit and compare/contrast the interest, willingness, motivation the participant has for each option.
- Step 3: Zooming in
    - Come to an agreement for a shared sense of direction.
    - Summarize to be sure the participant is on board.
- End session at this point – your focus has been set! Note: depending on your scenario, this could be a short amount of time.
    - Example 1: if you are a nurse coach and your participant has already been working on several goals (diabetes management, physical activity, weight management, etc.), you could offer the participant a menu of options regarding what they would like to discuss first that day.
    - Example 2: if you are a nurse coach and discussing a new treatment plan that your participant was provided by their doctor, you may list the 3-4 components of their treatment plan and ask where they may have questions or what might be the most challenging.

Step 3: Switch places and repeat instructions above.

MODULE 4: FOCUSING

Review Questions:

1. How did you feel as the practitioner in guiding your partner to a clear area of focus for the session?
2. What challenges do you face in trying to focus your sessions with your current patients in a client-centered way?

MODULE 5: EVOKING

Evoking DARN Change Talk

Step 1: With your partner, decide who will be Participant or Practitioner first.

Step 2: You will be repeating an activity you did in Module 1; however, this time you will be adding in all the skills that you have learned so far.

Instructions for Participant:

- This will NOT be a role play. You will use the same real health issue that you did for your activity in Module 1 – something that you know you should be doing but you are not doing or not doing consistently.
- Simply be yourself and respond naturally

Instructions for Practitioner:

- Facilitate a 7-8 min session with your partner
- Feel free to use and look at this handout as a guide
- Your overall approach is to engage, collaborate and evoke change talk
- Ask the questions below. Try not to give any advice. Try to provide reflections and affirmations where appropriate.
    - What is the reason that you picked this topic? (Listen) What else?
    - How important is it for you to start [quit] doing this behavior?
    - If you did decide to do this, how would your life be different and better in 6 months?
    - It's up to you if you decide to do this, but how would you go about getting started?
    - Give short summary/reflection of speaker's motivation; then ask:
    - End with a question (appropriate for your conversation and the member's readiness to change) to assess next steps: "So what do you think you'll do?" or "Where does this leave you?" or "What is your first step?" or "What do you need to do to prep for your plan?"
- Listen with interest and provide an affirmation; e.g., why you think they would succeed if they try and make this change

Step 3: Switch places and repeat instructions above.

Review Questions:

1. How did this activity go for you as practitioner this second time around? Were you able to put together your reflective listening and affirmations with your evocative questions?
2. Did you recognize which questions evoked the DARN change talk? What are some examples of the DARN change talk that your partner shared with you?

MODULE 5: Evoking

Assessing Importance or Confidence

Step 1: With your partner, decide who will be Participant or Practitioner first.

Step 2: Conduct a session; keep it around 10-15 minutes.

Instructions for Participant:

- This will NOT be a role play. You will be using the same health issue that you have used before or you can use another one – something that you know that you should be doing but you are not.
- Simply be yourself and respond naturally.

Instructions for Practitioner:

- Feel free to use this handout during your session.
- Engage the participant for a few minutes using your reflective listening skills.
- Once you explore their overall topic, see if you can identify or focus them on a sub-topic.
    - Example #1: if weight management is their issue, what behavior do they think would be helpful for them or a good place to start? Portion sizes? Better choices? Eating at home more? Exercise? This becomes the targeted behavior.
    - Example #2: if diabetes management is their issue, where are they doing well? Where are they struggling? What would be their preference on which aspect of their treatment plan you should address in your session today? This becomes the targeted behavior.
- Once you have a targeted behavior, ask the following questions in this order. Give plenty of time for your partner to answer. Listen well and affirm.
    - "At the present time, with 0 being the lowest value and 10 being the highest, how important is it to for you to ______?"
    - "What makes you a ___instead of a ___ (1 or 2 points lower)? What else?" (until they don't have any more reasons)

    NOTE: If your partner said "8" or higher, then at this point go to page 2 under Assessing Confidence because importance is not a problem for them. If your partner said "7" or lower, then continue on. In this case, you will not use the Assessing Confidence component at this time because they are still working on importance.

    - "What would it take to get you to ___ (2 points higher)? What else?" (until they don't have any more reasons)
    - "If you decided you were ready, who or what could help you make this change?"

    - "Let's suppose that you decided to make this change and you were successful. How would your life be different six months down the road?"
- Lastly, ask the participant: "Where does this leave you?", "What is your next step?", "When will you start?", "So, are you going to do this?" – whatever is appropriate for the situation.

Step 3: Switch places and repeat instructions above.

Review Questions:

1. How did this exercise go for you as practitioner? As participant?
2. What DARN and CAT change talk emerged during your session?

Assessing Confidence

Only use this section if Importance for your participant was "8" or higher.

- "Let's use the same scale but this time with confidence instead. At the present time, with 0 being the lowest value and 10 being the highest, how confident are you that you can _______________?"
- "What makes you a ____instead of a ____ (1 or 2 points lower)? What else?" (until they don't have any more reasons)
- "What would it take to get you to ____(1 or 2 points higher)? What else?" (until they don't have any more reasons)
- "What have you accomplished in your life that was really difficult?" Listen and pull out characteristics/traits/skills that enabled them to do it. "How could these same traits/skills help you in this case?"
- "Let's suppose that somehow we waved a magic wand: it's three weeks from now and you have successfully started _____________. What or who do you think helped you be successful?"

- Lastly ask "Where does this leave you?", "What is your next step?", "When will you start?", "So, you think you can do this?" – whatever question is appropriate for the situation.

Use the review questions above.

MODULE 6: Planning

Transitioning Into Planning

Step 1: With your partner, decide who will be Participant or Practitioner first.

Step 2: This activity should take around 10-15 minutes

Instructions for Participant:

- This is more of an informal work session rather than a coaching session. You will be using the same health issue that you used in Module 5 for the Assessing Importance activity.
- Assist your partner in filling out the columns (described below).
- Simply be yourself and respond naturally

Instructions for Practitioner:

- This is more of an informal work session rather than a coaching session.
- Take a clean sheet of paper and make 2 columns. On the left column, entitle it "On the one hand". On the right column, entitle it "On the other hand".
- Working with your partner's help, make a list on the left side of the Sustain Talk that came out during your Module 5 Assessing Importance activity; all the barriers and challenges against the behavior change they were discussing or reasons not to change. Put them into succinct bullet points on that left side column.
- Again, with your partner's help, make a list on the right side of the Change Talk that emerged during your Assessing Importance activity; all the desire, ability, reasons and needs for the behavior change. Plus all the steps they are already taking, any prep for new steps, or goals they set. Put them into succinct bullet points on that right side column.
- Now simply read your "summary" to your partner – starting with the left column first ("on the one hand") and ending with the right side ("on the other hand").
- Then ask your partner: "Where do you think this leaves you?" and allow them to respond.

Step 3: Switch places and repeat instructions above.

Review Questions:

1. Were you and your partner easily able to identify and jot down sustain talk and change talk for each of your sessions?
2. As the participant, how did it feel when the practitioner gave you the summary at the end even though it was done in an informal way?

MODULE 6: Planning

Putting It All Together

Step 1: With your partner, decide who will be Participant or Practitioner first.

Step 2: This activity should take around 15-20 minutes each

Instructions for Participant:

- This WILL be a role play
- Be a cream puff because your partner is putting a lot together.
- If you feel they miss something or get directive, you can give them feedback at the end; just be supportive during the session
- During the debrief, be sure to give more strokes than stretches!

Instructions for Practitioner:

- Working with your partner before starting the session, determine a realistic but straightforward scenario that is common in your [future] sessions with participants
- Avoid challenging situations for now; instead allow yourself an easier situation in which to practice going through the 4 phases of MI
- Facilitate a 15-20 minute session using the guide below
- Afterwards, debrief with your partner

Step 3: Switch places and repeat the instructions above

ENGAGING • Introduce yourself and inquire why the participant joined the study • Establish rapport and communicate partnership • Listen, demonstrate empathy, and validate
FOCUSING • Explore participant motivations & interests • Use menu of options, assuming that they listed some goals in their intake • Guide towards one of their goals to explore more deeply in this session
EVOKING • Assess importance and/or confidence for this goal (DARN) • What would be the benefits of taking action? (DARN) • What motivates the participant? (DARN)
PLANNING • Summarize what you've heard so far and elicit next steps (CAT) • Provide meaningful affirmation • Arrange follow-up

MODULE 6: Planning

Review Questions:

1. What are you already doing well in your health coaching sessions or practice?
2. What might you like to do differently?
3. What would be helpful as you start to incorporate these strategies in real participant sessions to build on your skills?