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# SKILLS SECTION

## YOUR JOB AS A RESOURCE FACILITATOR

### WHAT IS IT?

- It is helping people to see for themselves their problems and alternatives.
- It is giving people encouragement and support to solve their own problems.
- It is letting people know their rights and choices.
- It is assisting people in finding resources.
- It is allowing ventilation, without judgement.
- It can be giving a new perspective on a problem.
- It can be helping someone "hang in" and make it through a crisis.

### WHAT IS IT NOT?

- It is not giving advice.
- It is not solving a problem for them.
- It is not being a therapist or doctor – not diagnosing

**It is not sharing your own experiences.**

## **ROADBLOCKS TO ACTIVE LISTENING**

- Being judgemental
- Giving advice or opinions
- Promising what you cannot deliver
- Minimizing the person or their situation
- Being accusatory
- Rushing into problem-solving
- Playing the expert
- Maximizing the problem
- Losing control of call
- Panic or anger are luxuries we cannot afford

# **TELEPHONE COUNSELLING SKILLS**

Adapted from: C. Simmons-Physick, (1994). **Counselling Young People by Phone: A Kids Help Phone Handbook for Professional & Volunteer Counsellors.**

## **INTRODUCTION**

Telephone counselling provides the greatest possible access for clients. The people who call initiate the contact and determine what they will say and how much they will say. Counsellors assume that all problems are legitimate. They help callers towards determining the problem and resolving it.

The counsellor is dependent on what callers tell them. The anonymity in the service can attract callers towards seeking help. Often callers express a lot of feelings. They may be angry or feeling desperate that there is nowhere to turn. There is an immediacy and intensity in telephone counselling. For counsellors, the feeling that there is one opportunity to help someone can create anxiety.

The first moments of the call are very important as they create a first impression. The person calling is trying to determine if they have called the right place and who is answering their call. Conveying warmth can assist callers through these initial moments of the call. The counsellor is trying to determine if the problem falls within their area of service in order to know if they have the skills and knowledge to address the problem.

In most calls people are looking for information and referral. Problem solving is also a key component of what people need.

## **FOUR STAGES OF TELEPHONE COUNSELLING**

The four stages of telephone counselling are engagement, clarifying the caller's situation or problem, developing solutions and ending the call.

### **1. ENGAGEMENT**

#### **1.1 Developing Rapport**

Engagement involves developing a rapport or a sense of trust and harmony between you and your callers that will encourage them to talk candidly. Callers feel respected, believe that you take them seriously and trust that you will do your best to assist them.

This requires careful listening and showing an interest in and respect for what you are told. There are no visual cues in telephone counselling. You are reliant on voice tone and words. It won't be possible to develop rapport if counsellors impose their own beliefs and values on callers.

Active listening can assist in developing rapport. The five active listening tools are:

- using prompts
- open and closed questions
- paraphrasing
- clarifying facts
- empathy

Using prompts such as "uh huh", "yes" or " I see" lets callers know that you are listening and interested. It encourages callers to elaborate. It replaces eye contact, body language. Prompts help establish you as an active participant who is dependent on the caller's information, energy and commitment to find a solution.

### 1.2 Clarifying Roles

Telephone counselling works best with callers who actively participate in clarifying the problem, contribute ideas towards finding a solution and assume responsibility for deciding on a plan of action. Telephone counsellors walk a fine line between giving advice which is not their role and knowing when and how to make a suggestion that is not a solution. Questions such as "do you think I should?" can be responded to with "before you decide, tell me more" or "there's more than one solution, let's talk about it". This helps to establish that the caller is expected to decide on a solution, that the counsellor doesn't have the right answer and that they can work together to develop strategies.

Each call is an opportunity to help callers develop problem solving skills and feel competent. If necessary, telephone counsellors may need to explain their role to callers e.g. help you to clarify the problem, look at options and decide what is best for you.

### 1.3 Establish a Preliminary Understanding

Questions can assist the telephone counsellor in obtaining information, clarifying facts, exploring thoughts and feelings and in filling in the blanks. Open ended questions are useful for this.

<b>Open Ended Questions</b>	<b>Closed Questions</b>
How can I help you? Can you tell me more? What have you tried so far? What did the report say?	Get specifics. Answered with yes or no or one response. How old is your child?

Language is important to facilitate good communication. The following may assist in this process:

- incorporate some of the caller's expressions into your own language
- avoid jargon, cliches, overly conceptual language
- don't assume you understand each other. (Ask, and talk about misunderstandings being common).

- Ask callers to repeat themselves if you don't understand. Handled sensitively this can reduce tension and frustration.

## **2. COMPILING INFORMATION**

For the telephone counsellor compiling information can be like assembling pieces of a puzzle. Ask yourself how the caller is feeling, what is the problem? Sometimes using your intuition can be helpful to connect and respond to the caller. Intuition is based upon your prior experience, knowledge and listening skills. It can assist you in making a creative leap in understanding what is happening. However, an over reliance on intuition is a mistake. If intuitive feelings arise put them on hold until you clarify the caller's situation or problem to review and confirm your thoughts and feelings.

If after the first few minutes you are unable to clarify the problem, stop and assess the "block". Using such phrases as "I need to clarify", "I have a hunch" or "maybe I misunderstood" may assist you.

### Clarifying The Issue

Once you have a general understanding, move to clarify the issue. This process involves:

- piecing information and feelings together into a bigger picture
- moving from the general to the specific
- clarifying feelings
- relating facts and feelings
- developing a dynamic understanding and insight

The nature of your interaction shifts. You prompt less and ask more closed questions. You have more information to process and it gains in colour and depth. Limit information to the issue at hand. Don't get an extensive history. Keep in touch with the caller's feelings. For example you would ask more specific questions about whether or not an I.P.R.C. had been held, if an assessment had been completed.

Knowing in detail about all the past meetings with the school is not necessary at this point. Common sense is the best guide here.

### **2.1 Different Kinds of Questions**

\* Try probing statements and questions:

- Maybe you could tell me more about...
- When this is solved, what will be different?
- How big is this problem on a scale of one to ten?

\* Avoid why questions and try comparison questions.

- "Why did you refuse an assessment?" will probably evoke guilt.
- "Would you prefer to try a) or b) as the next step?" may help to clarify the caller's priorities.

\*Encourage the caller to ask questions. "How would you know if...?", "What could you ask yourself?"

\* Try modelling feelings. "If that happened to me I'd feel ..."

\* Try universal feelings. "When that happens people sometimes feel... How has it been for you?"

\* Use accent questions.     Caller:            "When that happens I feel ..."  
                                  Counsellor: "When what happens?"

## 2.2 Paraphrasing

- repeats and summarizes the main idea the caller has told you
- clarifies any misunderstandings
- useful if you are bogging down in detail
- summarize and redirect the caller to what hasn't been covered

## 2.3 Clarifying and Connecting Facts and Feelings

- central problem may be unclear due to caller's emotions and influences beyond the caller's control
- help focus on the caller's feelings
- can confirm your understanding of what callers "mean" and help them clarify for themselves how they feel.
- if you need to develop a mental picture ask the caller how someone else would describe him/her or their child.

As callers begin to deal with the heart of the issue, they may go off on a tangent, become irritable or introduce a new problem. Gently but firmly keep the caller focussed.

## 2.4 Using Empathy

Empathy "is using fresh words and simple language to summarize the essential aspects of a message communicated by another person. ... If someone else knows what I am talking about, what I mean, then to this degree, I am not so strange, or alien or set apart." (p.46).

- helpful as it reflects an understanding of the caller's emotions
- can assist in getting to the core of the concern by drawing out the caller's feelings.
- conveyed through words and tone of voice
- caller's reactions will guide you; interactions will feel right, you can hear relief and you will learn more.

## Avoid

- silence, as it may be read as disinterest
- asking questions after client has expressed feelings
- cliches
- moving too quickly towards interpretation or facts. (May convey a lack of interest in feelings or that callers aren't proceeding quickly enough).

## **2.5 Information and/or Referrals**

Some callers phone primarily for information.

If you are asked a question by a caller there are several possible responses:

- acknowledge the caller's question, state your intention to answer it and explain your need for more information to answer it accurately.
- answer the question and offer assistance if the caller would like to discuss this or anything else further.
- listen for underlying concerns or distress signals.

## Referrals

Treat referrals the same way that you handle requests for information. Answer the question and offer more assistance, e.g. "Yes, I can direct you to some psychologists. I can also answer any questions that you might have".

Before completing a referral, evaluate the caller's ability and willingness and/or readiness to make the contact on their own. Occasionally it may be necessary to make an initial contact for information on behalf of someone. You need to get their permission to do this. Wherever possible, advise callers about any intake procedures they may encounter.

## **3. DEVELOPING SOLUTIONS**

Sometimes clarifying the problem is enough for now or the solution has fallen into place and so the call will come to a close. Ask yourself if you have been giving advice as the caller may have tired of you.

### Four Steps to Developing Solutions

#### **3.1 Defining a Goal**

- a goal is a change a caller wants to make in behaviour, feelings or circumstances

- goals must be clear and specific, measurable and verifiable, realistic and attainable, positive, in keeping with the caller's values.
- Possible question is "what would it be like if your problem was solved?"

### **3.2 Identifying, Clarifying & Defining What Realistically Can Be Changed**

Callers may get trapped in feeling that the problem is out of their control, in assigning blame, in focusing on what other people should do, in fatalistic or wishful thinking.

- share information
- convey empathy
- challenge self defeating behaviour by helping callers connect patterns of behaviour with feelings
- share part of your experience. Be brief, use with discretion. This shifts the focus to you and callers may feel burdened.

Encourage callers to generate solutions by asking "what have you tried ?", brainstorming other options.

Give the caller a task.

Develop a list of goals and evaluate advantages, disadvantages, benefits, risks. Separate short term from long term goals. Let the caller do as much of the work as possible.

Decide on a plan of action based on the most suitable option. Don't rush. Troubleshoot what will happen if the plan doesn't work.

## **4. ENDING THE CALL**

For some callers information and ease of access was the primary reason they called. The purpose of telephone counselling is to keep callers engaged long enough that you can respond in a meaningful way through having enough information, helping callers explore options and make good decisions for themselves.

The intimacy involved in telephone counselling leads to a risk of prolonging the contact needlessly. Because telephone counsellors receive very little feedback, they may prolong contact with people where they feel particularly insightful and helpful.

In ending the call review and summarize what has been accomplished and acknowledge the emotional bond that may have developed. Guide the caller towards ending and encourage follow up.

### When To End

- if there are extended pauses or repetitive statements it is time to evaluate progress
- avoid tackling multiple problems in one call
- if people ramble, firmly intervene and refocus
- avoid new problems being introduced
- may need to be directive "I think we need to wrap up".
- avoid "I'm busy, I need to let other people call through".

### Follow Up

If you refer callers elsewhere, tell them to call back if they encounter difficulties. You may also want to hear how a particular caller is doing. Solving a problem in one call may also not be realistic.

### Avoid

The relationship changing from a counselling to a social relationship.  
The caller becoming overly dependent on the organization rather than on appropriate support services.

Telephone counselling is rewarding work. It can also be tiring and difficult. There is a need for support and supervision to ensure continuity as well as quality work. Support can be sought within the chapter executive, from other chapters and the LDAO office.

<b>Effective Counselling</b>	<b>Ineffective Counselling</b>
Helps people tap into their resources gain a more realistic perspective on what they can/can't change develop a concrete plan to create positive change	promotes caller dependency accomplishments attributed to counsellor's expertise success depends on continued contact



## **STEPS IN THE INFORMATION AND REFERRAL PROCESS**

### **INITIAL ASSESSMENT**

1. Have you taken the time to listen?
2. Do you know the real question/problem? Do you sense any underlying question which you can help the client express?
3. If there are several problems, have you helped the client determine which is the most urgent or important? Do you know if/how the problems affect each other?
4. Do you know all the relevant facts?
5. Do you know if the client has tried any solutions and what the results were?
6. Have you checked your understanding of the situation with the client by restating the question? Do you know what the client wants to do?
7. Is the client capable and willing to act further on her/his behalf?
8. Do you have the necessary knowledge, skills and authority to help the client? Have you decided what step(s) you are going to take?

## **PROGRESS OF A CALL**

### **FOUR STEPS TO HELPING: THE PERSON ORIENTED MODEL**

#### **STEP ONE: *INITIATING CONTACT***

warmth  
acceptance  
respect  
patience  
caring  
suspending moral judgements

#### **STEP TWO **EXPLORING CALLERS' PROBLEMS AND FEELINGS****

encouraging  
identifying feelings and issues  
reflecting  
clarifying  
understanding

#### **STEP THREE **EXPLORING ALTERNATIVES****

brainstorming  
considering  
expanding  
reorganizing  
supporting callers' choices

#### **STEP FOUR **SUMMARY AND TERMINATION****

summarize  
clarify  
be concise  
be positive  
reassure

**KEY: INVOLVE CALLERS**

## DIFFERENCES BETWEEN SYMPATHY AND EMPATHY

<b>SYMPATHY</b>	<b>EMPATHY</b>
Your focus is on the parallel between your own feelings and the feelings of callers. You are paying attention to the similarity between your feelings and those of the callers'.	Your focus is on the feelings and situation of callers, you "experience" what callers are experiencing.
You do not go beyond the parallel between your feelings.	Your purpose is to understand callers.
You do not explore other feelings of callers because you assume that they are identical to your own.	You are not so conscious of your- self, of your own identity, because you put yourself into callers' situations.

## THE EMPATHETIC PERSON

People who are empathetic are good listeners when you need to talk They can be trusted with your secrets and your confidences. Although they may have different value systems from yours, they don't judge you for living your own way. They don't shock easily, but accept your feelings.

They are not embarrassed by your tears. They are not prone to giving advice. They remind you of your strengths. Their own troubles are something that they can acknowledge and discuss. They are not afraid to question you directly concerning your feelings. Although they may not feel comfortable with a feeling that you are expressing, they try to understand what the feeling means to you.

## **COMMON ACCEPTANCE ERRORS**

The following are mistakes that most of us have made at one time or another. By listing the most general type of mistakes, it is hoped that we might be able to eliminate them from your relationship with the callers. If you are having uneasy feelings or problems with a call, you might check this list.

### **TOO QUICK TO DEFINE THE PROBLEM**

Some people presuppose that they know what callers want before the callers have had the chance to tell them. Never assume that you know what callers will say, or cut callers short when they are describing their situation. Even if your diagnosis of callers' problems is correct, you may be eliminating the vital time that is necessary for callers to not only express their problem, but also, to express the emotions that accompany the problem. It is important not to rush callers to the "heart of the matter". Remember callers lead.

### **NOT ACCEPTING THE CALLERS VALUE SYSTEM**

You can seriously inhibit a person who might want to open up to you by implicitly or explicitly not accepting their lifestyle or value system. You must be neutral and non-judgemental.

### **TALKING AT, OVER, OR UNDER, RATHER THAN WITH THE CALLERS**

Remember that the problem is a way of speaking to the person, not the other way around. Be sure that you have given callers the opportunity to ventilate the problem before you feel that you know it all. Never put callers or their situation down.

### **OVER-IDENTIFYING WITH THE CALLER**

This can happen to all of us. Volunteers may have experienced the same kind of problems that are distressing callers; or the call might go on past a point where therapeutic help is being given and lapse into a situation where the conversation rambles and becomes more and more personal. Both of these incidents are natural occurrences and to forewarned is to be forearmed. When callers' distress has been alleviated, the worker should try to terminate the call gradually. To let the call trail on runs the risk of building up friendship expectations in the caller towards that particular volunteer.

### **PLAYING THE EXPERT**

Some volunteers are familiar with certain problems and thus, rightly or wrongly, feel that they know the subject inside and out. This can be a serious problem for volunteers because they begin to see stereotypes and not the person.

It is important to know when to involve someone else. Try not to get out of your depth as an in-take worker.

## **VENTILATING SUGGESTIONS**

### **SPEAK SLOWLY, DISTINCTLY, CALMLY, AND THINK BEFORE YOU SPEAK**

I hear you saying...  
You sound as if the situation has been upsetting you.  
Then what did you do?  
You sound angry, sad, etc...  
I would have been shaken if..., were you?  
Would you like to talk about something else first?  
Has something happened today to make you feel more...?  
I would like to hear more about...  
How did this make you feel...?  
When did it all start...?  
How often does it happen...?  
Do you mean that...?  
Can you tell me more about...?  
I get lonely sometimes...  
That sounds normal to me...  
We care.  
There is usually someone here if you want to talk.  
What do you think you ought to do now?  
What do you feel about...?  
I was wondering, have you ever considered...?  
It must be very difficult for you...

### **OBJECTIVES OF VOLUNTEERS' RESPONSES TO CALLERS**

- The callers will know that they have been heard.
- The callers will not feel alone, but will have the sense of someone with them.
- The callers will have a clearer idea of what they think, feel, and desire.
- The callers will have something substantial to think about.
- The pressure will be ventilated for a while at least.

### **WARNINGS**

We cannot diagnose the person's needs or difficulties, therefore we try to avoid saying "It sounds like your child has a learning disability or attention deficit disorder". Leave such determinations for the experts.

## THE MODEL FOR REFUSAL

- **It is all right to say no or I don't know**
- **SET YOUR LIMITS.** Say as clearly as you can what your limits are and your reasons for them: "I can't... because"; "I'm not willing to...because;" or "I'm not comfortable with...because;" or "I don't know but I can find out".
- **OFFER THE INVITATION.** Say clearly to callers what you can or are able to do. This invitation demonstrates that even though you won't meet their specific request or demand, you are still concerned about the caller and want to keep your focus on them "but..., however..., I'd be glad to...".