

Tool: Assessing and Brainstorming.

"A Practical Guide for Case Managers and Human Services Professionals to Assess Challenges, Leverage Resources, and Develop Actionable Solutions"

The Prosperity Agenda



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This coaching tool is designed to help case managers, human services professionals, and supervisors guide participants through challenging situations. By focusing on assessing both the issue and the resources available, this worksheet promotes collaborative problem-solving while empowering participants to take actionable steps.

Whether working with families facing housing insecurity, childcare difficulties, or financial struggles, this tool provides a structured way to break down the problem, identify strengths, and build solutions together.

Instructions:

1. Use this worksheet during coaching sessions or one-on-one meetings with participants.
2. Ask the questions listed under each section to guide the conversation.
3. Provide ample time for participants to reflect and respond in detail.
4. Use the insights gained to co-create a specific and achievable action plan.

Step 1: Assess the Situation

1. What is the problem?

Help participants clearly define the issue they're facing. Be specific and encourage them to focus on one problem at a time.

Example: A single mother struggles to find affordable childcare while balancing a low-income job.

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- *Coaching Tip:* Ask questions like, “What is the immediate challenge?” or “What’s causing the most stress right now?”
 - Participant Response Area:
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2. What have you tried?

Encourage participants to reflect on previous attempts to solve the problem. This helps identify strategies that worked, as well as those that didn’t.

Example: The participant has applied for government childcare assistance but was placed on a waiting list.

- *Coaching Tip:* Explore their previous efforts by asking, “What actions have you taken so far?” or “Who have you reached out to for support?”
 - Participant Response Area:
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3. What is working? What is making things worse?

Support participants in recognizing strategies that have shown some success and identifying barriers that continue to hinder progress.

Example: The participant’s family member occasionally helps with childcare, but inconsistent schedules make it unreliable.

- *Coaching Tip:* Ask, “What small steps or solutions have worked for you?” and “What challenges keep getting in the way?”
 - Participant Response Area:
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4. What do you need?

Help participants articulate their immediate needs to move closer to a solution. This could include resources, connections, or skills they currently lack.

Example: The participant needs affordable, reliable childcare options near their workplace.

- *Coaching Tip:* Guide them by asking, “If you could have one thing to make this easier, what would it be?” or “What specific support would help you the most right now?”
- Participant Response Area:

Step 2: Assess the Resources

1. What do you have?

Encourage participants to reflect on existing strengths, skills, and resources. These could include community programs, personal networks, or financial assistance.

Example: The participant has access to transportation and a flexible employer who understands their childcare struggles.

- *Coaching Tip:* Ask, “What resources or tools do you already have at your disposal?”
- Participant Response Area:

2. Who do you know?

Help participants identify individuals or organizations in their network that could offer guidance, support, or collaboration.

Example: The participant’s employer might know of nearby childcare programs, or a caseworker could connect them with local resources.

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- *Coaching Tip:* Ask, “Is there anyone in your personal or professional life who could help with this situation?”
- **Participant Response Area:**

3. What can you do?

Assess participants skills and know-how and work with participants to outline immediate actions they can take with their current resources and connections. Empower them to leverage their skills and take ownership of the steps forward..

Example: The participant can research local community centers offering temporary childcare services or attend a neighborhood resource fair.

- *Coaching Tip:* Ask, “What are you great at? What are your best talents and natural abilities?”
- **Participant Response Area:**

- *Coaching Tip:* Ask, “What’s one small step you can take today?” or “What actions feel realistic and doable right now?”
- **Participant Response Area:**

Next Steps:

Once you have completed this tool, you are ready to move on to the next stage: Plan-Do-Review. Use the insights you’ve gathered here to develop a clear, actionable plan, implement it, and evaluate the results.

1. Prioritizes the immediate next steps.
2. Identifies ongoing support needs.
3. Sets a follow-up date to review progress and adjust the plan as needed.

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Remember: This tool is not just about solving problems—it's about building participants' confidence and empowering them to take control of their circumstances.

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