



Case Manager Interviewing Toolkit

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Introduction

This case manager interviewing toolkit is designed to equip YouthBuild case managers with comprehensive resources, tools, and guidelines to support and advocate for opportunity youth. These tools align with the case management profession's promising practices to consistently and efficiently improve YouthBuild participant outcomes.

Your YouthBuild program plays an important role in supporting participants in achieving their goals while helping to remove barriers along the way. We invite you to review this toolkit to strengthen your case management component.

Case Management and YouthBuild

The case management component of the YouthBuild model is important because it supports the end goal for YouthBuild participants to obtain employment, career advancement, and other personal, professional, and educational goals by helping them meet their immediate needs and overcome barriers.

A strong case management and supportive services component includes regular case conferencing with the participant, case manager, and partner(s), and a proactive referral and resource plan documenting [services that are readily accessible when needed](#) (e.g., substance/alcohol use or mental health counseling) and a proactive supportive services plan.

Specific examples of a YouthBuild program with a strong case management and supportive services component include:

- Using trauma-informed techniques during case manager interviews.
- Holding case conferencing at regular points during the YouthBuild timeline.
- Developing an individualized plan unique to each participant outlining concrete goals and a pathway to meet those goals.
- Supporting young people to understand emotional regulation and increase problem-solving skills
- Documenting any conversations or meetings with participants, especially when a participant is experiencing a problem or advisement of potential consequences such as stipend reduction or removal from the program if necessary.
- Strengthening participant connections to ensure post-exit follow-up continuity and access.

How Does a Strong Supportive Services and Career Counseling Component Help Participants Reach Their Goals?

Meets and addresses their immediate needs, such as housing, transportation, childcare, healthcare, educational testing, and work-related resources.

Helps them overcome barriers and centers their autonomy and ability to continue school, work, and career pathway progress.

While YouthBuild case managers are known by various titles (e.g., advocate or coach), they all carry out similar tasks that include:

- Referral to service providers and resources in the community
- Documentation
- Organizational development
- Youth engagement
- Assessment
- Planning
- Implementation strategies to reach goals
- Monitoring participation
- Performance reviews
- Supporting staff to ensure the individualized case plan for each participant is not *only* met but *promotes* each participant exceeding their goals

About Case Management Interviews

According to the [National Association of Social Workers](#) standards for case management, the case manager interview (between the participant and case manager) uses trauma-informed, strengths-based, and Motivational Interviewing (MI) techniques to create a safe and supportive environment for participants and center youth voice. Goals include establishing a supportive relationship, gathering relevant information, identifying strengths and resources, setting goals, respecting the participant's autonomy, and promoting their motivation for change.

Generally, case management interviews facilitate effective communication, assessment, planning, and monitoring of needs, leading to better outcomes and support for young people.

See the graphic to the right for reasons why case manager interviews are an important aspect of case management.



Monitor progress



Develop a plan



Gather information



Build rapport



Identify resources



Assess needs

Seven Elements of a Successful Interview

1. Create a safe and welcoming environment

for the participant, such as a private and quiet space where they feel comfortable and at ease. Introduce yourself and explain the purpose of the interview. Let the participant know they can take breaks or stop the conversation anytime if they feel uncomfortable.

2. Use open-ended questions. This allows the participant to share their experiences and goals in their own words. Avoid leading questions or ones that assume certain experiences or feelings. Questions that begin with “isn’t it true” or “wouldn’t you agree” are examples of questions to avoid.

3. Listen actively and empathetically to the participants’ responses and validate their experiences and feelings. Use reflective listening techniques, such as summarizing or paraphrasing what the participant has said to show that you are listening and understanding.

4. Be aware of potential triggers and be respectful of boundaries. If the participant becomes upset or uncomfortable, offer support and validation. Consider taking a break or rescheduling the interview if necessary.

5. Focus on strengths and goals and help the participant identify their own strengths and resources. Foster a participant’s sense of resilience and ability to overcome challenges.

6. Elicit change talk by asking questions. This encourages participants to talk about their desire, ability, reason, and need for change or assistance. This can help to promote a sense of motivation and commitment to making positive changes.

7. Roll with resistance when the participant expresses resistance or ambivalence about making changes. Avoid arguing or confronting them, and instead acknowledge their concerns and explore their reasons for not making changes. This can help to promote a sense of autonomy and respect. It can also help to identify areas where the participant may need additional support or resources.

You can find sample interview questions for the following categories in the “Case Management Interview Questions by Topic” resource at the end of this toolkit.

- Introduction
- Housing, Food, Transportation, Finances, and Basic Needs
- Mental Health
- Learning and Leadership
- Substance Use and Court Involvement
- Family and Support Networks



Using Motivational Interviewing Techniques

Motivational Interviewing (MI) is designed to help individuals resolve ambivalence or uncertainty and increase motivation to change. It is client-centered and based on the principles of empathy, collaboration, and autonomy. MI is often used in the context of behavior change, such as substance use. However, it can also be used in areas like health behavior change, plans for further education, and career development.

MI is used in a collaborative and non-confrontational manner where the client (or participant) is actively working to identify their goals and values and developing a plan for change that is consistent with them ([Care, How to Increase Motivation](#)).

Core Principles of MI



Express Empathy

Shows acceptance and increases the chance of developing a rapport.



Develop Discrepancy

Helps the participant see that their present situation does not necessarily fit into their values and what they would like in the future.



Roll with Resistance

Prevents a breakdown in communication and allows the participant to explore their views (avoid arguing but do not oppose resistance).



Support Self-Efficacy

If a participant believes they can change, the likelihood of change is greatly increased.

The following Motivational Interviewing strategies can be used to help the client explore their ambivalence and increase their motivation to change:

- **Ask open-ended questions.** Elicits the client's thoughts, feelings, preferences, and goals. Open-ended questions are also person-centered because they do not lead toward a right or wrong, yes or no answer. Pose a question that starts with "why," "how," or "what."
- **Affirm.** Acknowledges effort, willingness to listen, communicates the presence of positive regard, and emphasizes a person's strengths and resources. They must be genuine and can be as simple as "you've really given this a lot of thought" or "you worked really hard on that."
- **Reflect.** An effective strategy for demonstrating that you are listening and improving understanding. Reflections might start with "it sounds like." This helps the person feel heard and understood.
- **Summarize.** A way to recap and highlight the main points discussed. This demonstrates listening and validation.
- **Plan.** Acknowledges motivation and encourages collaboration, empowerment, and commitment.
- **Use change-oriented language.** Acknowledges the readiness for change. This can include framing challenges and struggles as opportunities for growth and transformation and utilizing a forward-focused mindset. An example is "how can you apply what you learned to the next obstacle that may arrive?" Not "why didn't you do that before?"

Recognizing Change Talk

TYPE	DEFINITION	EXAMPLE
DESIRE	Desire to change	"I wish I could quit smoking."
ABILITY	Ability to change	"I stopped smoking weed before; I can probably do it again."
REASON	Reasons to change	"My mom would get off my back if I quit drinking."
NEED	Urgency for change	"I need to keep my driver's license; I can't work without it."
COMMITMENT	Commitment to change	"I'm going to take a different bus route home to avoid passing the park where my old friends hang out."
ACTIVATION	Leaning toward the direction of change	"I passed my first GED test!"
TAKING STEPS	Specific actions toward change	"I'm starting to notice how hanging out with Alex is a high-risk situation for me."

Source: [ResearchGate](#)



Referrals and Partnerships

Whole Person/Wraparound Approach

After reviewing answers to interview questions, the case manager should determine which resources and services the participant needs, including any recommended referrals. A best practice is to collaborate with the participant and their support system during this process using a whole person/wraparound approach to achieve positive outcomes.

The whole person/wraparound approach recognizes that young people have complex needs that must be addressed for them to achieve their goals and reach their full potential. This includes addressing housing, food, transportation, mental health, financial, racial, and cultural needs/challenges, among other topics.

YouthBuild programs, especially case managers, should research both local and national resources to supplement their supportive services plan. Develop a partnership with local community agencies to refer and/or provide your participants with services, resources for basic needs, and wellness opportunities (see [Community Asset Mapping Topic in Brief](#)).

Key techniques of the whole person/wraparound approach

Reviewing

Regularly review the plan and adjust based on progress and changing needs.

Engagement

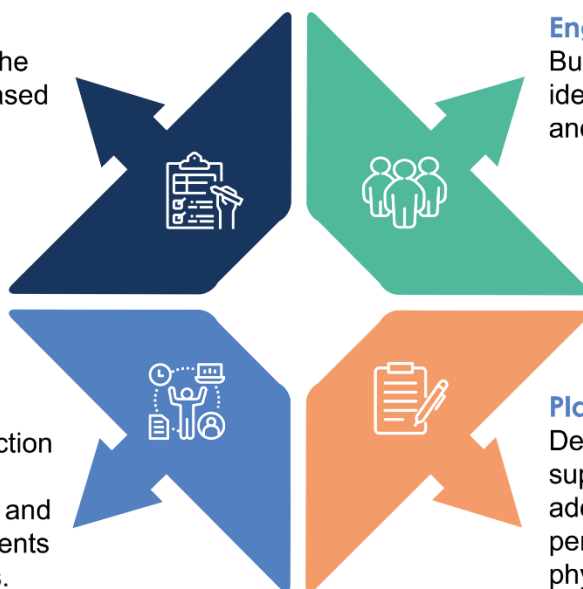
Build relationships and identify strengths, needs, and goals.

Planning

Develop a comprehensive supportive service plan that addresses all aspects of a person's life, including physical, emotional, social, and educational needs.

Implementation

Put the plan into action while providing the necessary support and services to help clients achieve their goals.



Examples of some national resources, useful when developing a supportive services plan:

MENTAL HEALTH

[National Alliance on Mental Illness \(NAMI\)](#),
[National Institute for Mental Health \(NIH\)](#),
[Substance Abuse and Mental Health Services Administration \(SAMHSA\)](#), [Findtreatment.gov](#),
[American Foundation for Suicide Prevention \(AFSP\)](#)

SUBSTANCE USE

[SAMHSA](#), [Findtreatment.gov](#), [AFSP](#)

HOUSING

[SAMHSA Homelessness Programs](#)

MEDICAL

[Health Resources and Services Administration](#)

CHILDCARE

[Childcare.gov](#)

FOOD

[Supplemental Nutrition Assistance Program](#),
[Special Supplemental Nutrition Program for Women, Infants, and Children \(WIC\)](#), [Other Food Programs](#)

OTHER

Local organizations and agencies can help you meet other program and participant needs to address legal aid, clothing (e.g., Goodwill or Dress for Success), personal protective equipment donations, cultural arts (e.g., library for museum, movie, zoo passes), dental services, etc. The community asset map can be valuable in documenting these resources.



Links to Related TENs and TEGLs

[TEN 12-21](#)

[TEGL 09-22](#)

[TEN 18-21](#)

[TEGL 23-19,](#)

[TEN 44-07](#)



PRACTICE

Case Management Interview Questions

Here are sample questions – organized by topic – that a case manager can use with a YouthBuild participant.

Introduction

1. Can you tell me a little bit about yourself and your background?
2. What are some of your strengths and skills that you will bring to the program?
3. What are some of the challenges or barriers that you have faced in the past?
4. What are some of your goals for the future, both short-term and long-term?
5. What are some of the things that you are most proud of in your life?
6. Can you tell me a little bit about your cultural background and identity?
7. What are some of the things that you are hoping to learn or achieve in the YouthBuild program?
8. What motivated you to apply for the YouthBuild program?
9. How can we best support you in achieving your goals?
10. What else would you like us to know about you?

Housing, Food, Transportation, Finances, and Basic Needs

1. How would you describe your current living situation? Do you feel safe and comfortable where you are living?
2. Are you currently experiencing any challenges related to housing, such as difficulty paying rent or finding a stable place to live?
3. How would you describe your current access to food and nutrition? Are you able to access food on a regular basis? Are you able to access healthy and nutritious food on a regular basis?
4. How would you describe your health? Are you able to access healthcare on a regular basis?
5. Would you be interested in finding the right medical provider?
6. Can you tell me a little bit about your transportation situation?
7. How do you see your transportation situation impacting your participation in the YouthBuild program?
8. How can we best support you in addressing any transportation challenges or barriers that you may face?
9. Do you feel comfortable talking about your current financial situation?
10. Would it be helpful to have more financial education? Particularly around budgeting, saving, and credit?
11. Are there any specific financial challenges or barriers that you anticipate facing in the program?
12. How can we best support you in addressing any financial challenges or barriers that you may face?

Mental Health

1. Are you currently experiencing any challenges related to mental health, such as anxiety, depression, or trauma symptoms?
2. Have you ever received any mental health services or counseling in the past? If so, how did that experience go for you?
3. Are you currently receiving any mental health services or counseling? If not, would you be interested in exploring those options?
4. Are there any specific challenges or barriers that you are currently facing that are impacting your day-to-day life?
5. Is there anything else that you would like to share or discuss related to your current level of functioning, housing, food, or mental health?

Learning and Leadership

1. Are there any education related support services that you may need to fully participate in the program?
2. How would you describe your learning style and preferences?
3. Are there any specific areas of interest or passion that you have that you would like to explore in the program?
4. How do you feel about working in a team or group setting?
5. How do you define leadership? What qualities do you think are important for a leader to have?
6. Have you ever had the opportunity to take on a leadership role in the past? If so, can you tell me about that experience?
7. How do you see yourself as a leader? What strengths or skills do you bring to a leadership role?
8. Are there any specific leadership skills or knowledge that you hope to gain from the YouthBuild program?

Substance Use and Court Involvement

1. Have you ever used drugs or alcohol in the past? If so, can you tell me about that experience?
2. Are you currently using drugs or alcohol? If so, how often and how much?
3. Have you ever received any treatment or support for substance use in the past? If so, how did that experience go for you?
4. Are you currently receiving any treatment or support for substance use? If not, would you be interested in exploring those options?
5. Have you ever been involved with the court system in the past? If so, can you tell me about that experience?
6. Are you currently involved with the court system? If so, can you tell me about your current situation?
7. Do you anticipate any specific challenges or barriers related to substance use or court involvement in the program?
8. How can we best support you in addressing any challenges or barriers related to substance use or court involvement?
9. Is there anything else that you would like to share or discuss related to substance use or court involvement?
10. How do you see the YouthBuild program fitting into your efforts to address any challenges or barriers related to substance use or court involvement?

Family and Support Networks

1. Can you tell me a little bit about your family and social support networks?
2. How do you see your family and social support networks impacting your participation in the YouthBuild program?
3. Are there any specific challenges or barriers related to your family or social support networks that you anticipate facing in the program?
4. Are you a parent?
5. Do you need support with childcare?
6. How can we best support you in addressing any challenges or barriers related to your family or social support networks?
7. Are there any specific family or social support resources or services that you would like to explore or access through the program?
8. How do you see the YouthBuild program fitting into your overall support network?

Tips for continued case management interviewing and successful implementation:

- ☐ Schedule regular meetings with participants (weekly or biweekly).
- ☐ Use case note template.
- ☐ Ask open-ended questions.
- ☐ Practice empathy.
- ☐ Engage in mindfulness practices.
- ☐ Check in about topics from the intake interview (goals/referrals, housing, food, medical, and support networks).
- ☐ Review and share case management resources with your staff and partners to continue developing strengths-based supportive services plans for your young people.

