

Structuring the Helping Relationship

Joint Annual Conference 2026

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Strategic Risk
Management Solutions

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What Makes a Case Management Interaction Successful?

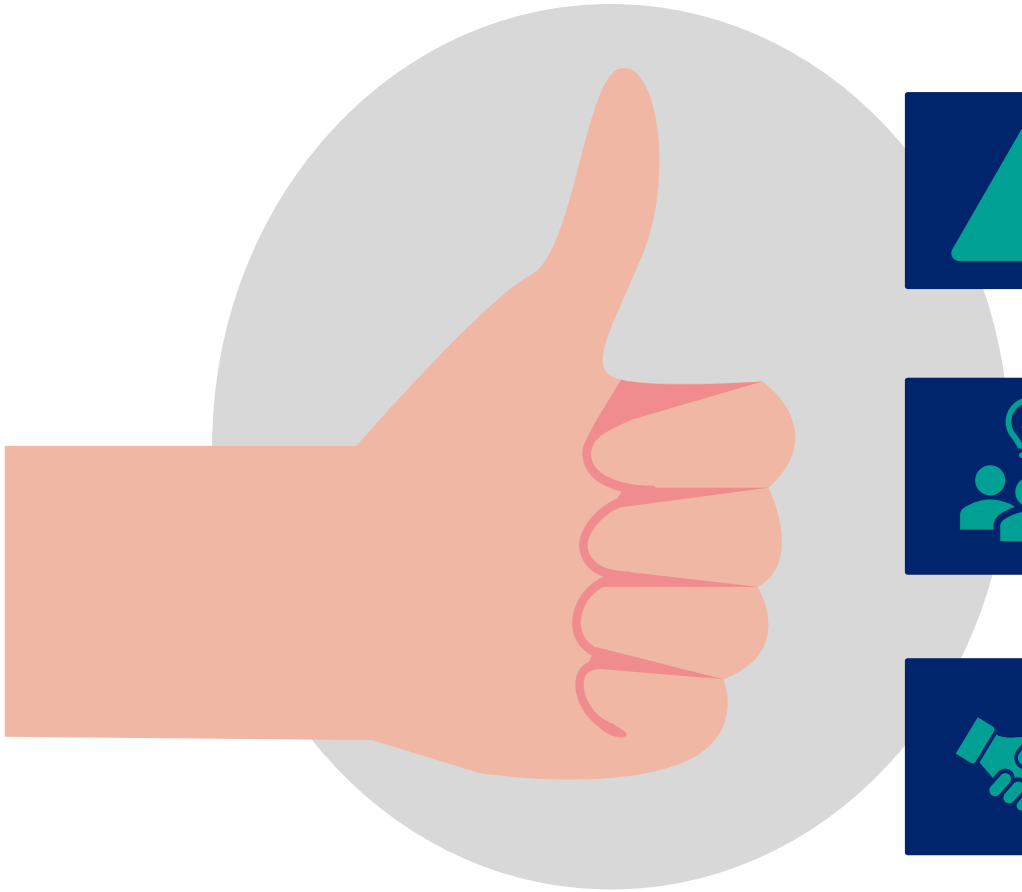
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- Is success that the student received a resource?
- That the immediate problem was solved?
- That you talked to the student about their behavior?
- That they liked the interaction?

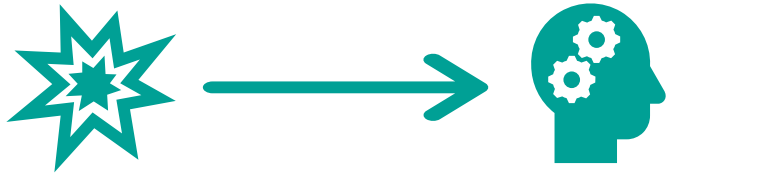
Successful Case Management

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- **Stablilize** immediate concerns
- **Navigate** barriers, systems, and resources
- **Build capacity** for students to manage future challenges

Professional Instinct to Structured Help



An **intentional case manager** asks:

- What is actually happening?
- What does this student need right now?
- How ready are they to address it?
- What outcome(s) are we working toward?
- What should my role be?

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Strategies for Structuring the Helping Relationship

1

The Transtheoretical Model (Stages of Change)

Provides a model for understanding an individual's readiness to change

2

Transactional vs Transformational Case Management

Based on where the individual is in their readiness to change and what their presenting concerns are, case managers can determine which case management approach would be most effective for moving them

3

The Skilled Helper

Provides a three-stage approach to structuring the case management relationship

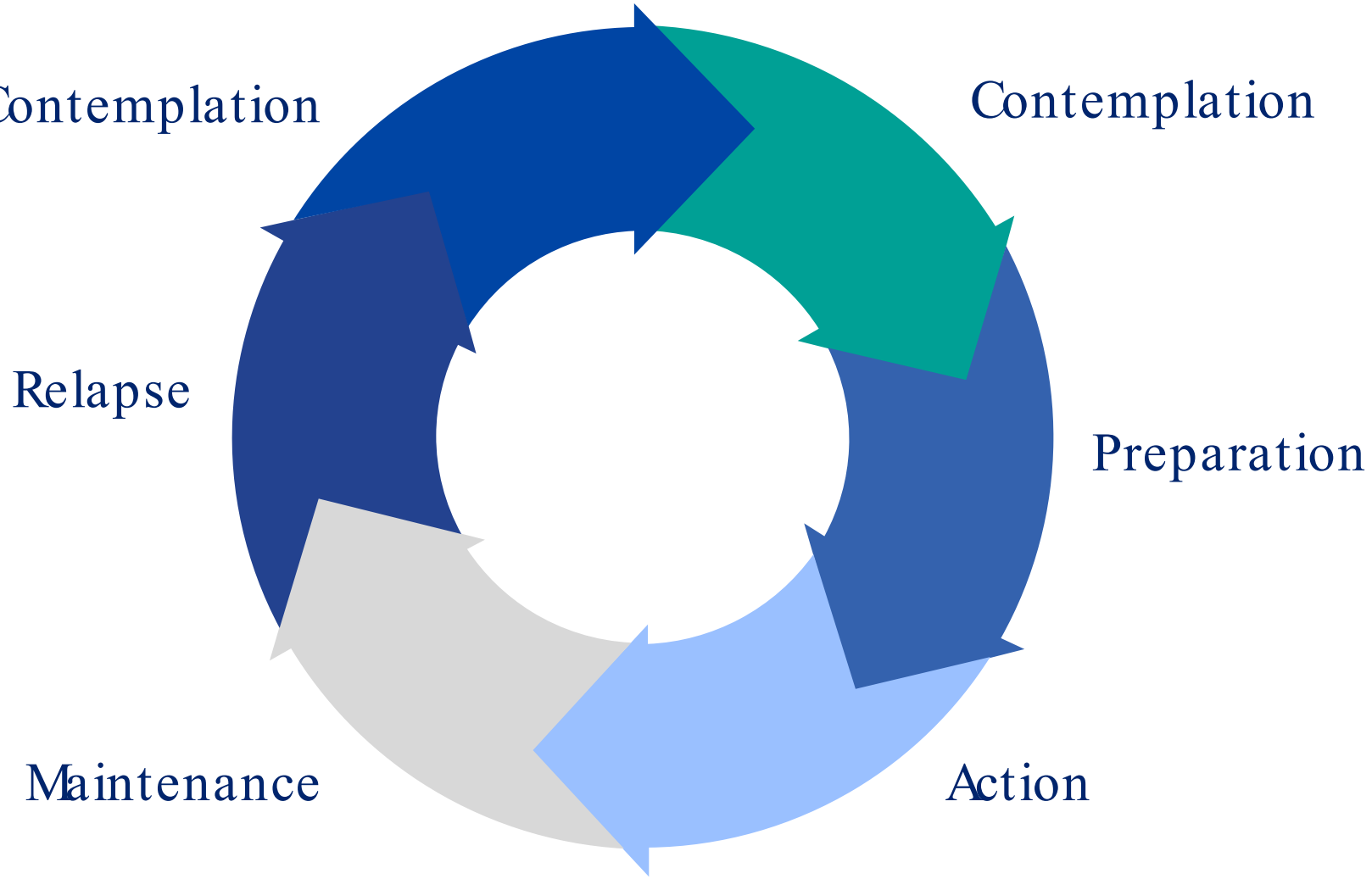
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The Transtheoretical Mode (Stages of Change

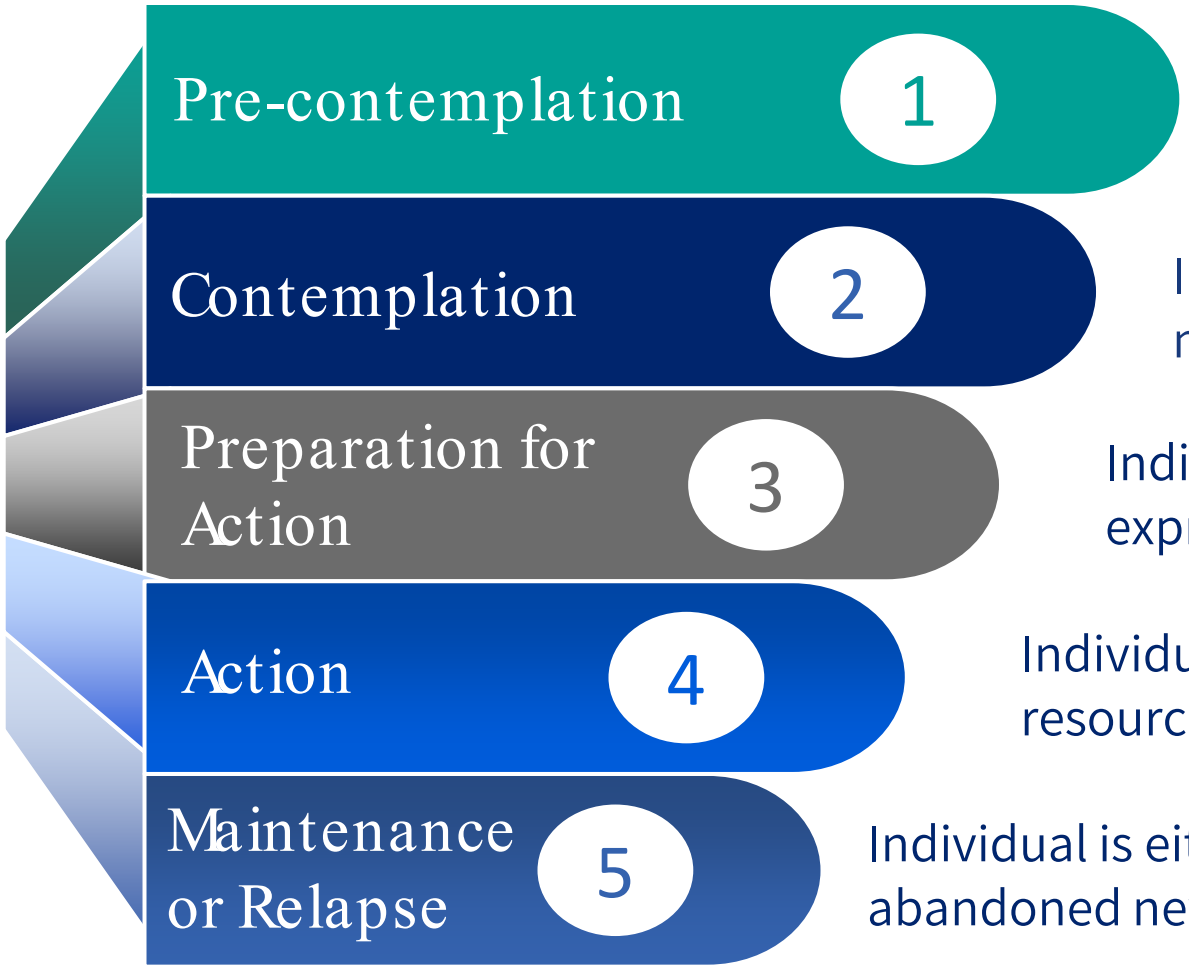
Provides a model for understanding an individual's readiness to change

Transtheoretical Mode (Stages of Change)



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Defining the Stages



Individual is not acknowledging there is a problem behavior, and is therefore not considering change

Individual acknowledges there is a problem but is not yet ready, or is not sure how, to make a change

Individual is getting ready to make changes and expresses an intent to take-action

Individual is actively modifying behaviors and engaging in resources to support behavior change

Individual is either maintaining new behavior or has abandoned new behaviors and returned to old patterns

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Understanding Change

- A change might mean an actual change in behavior, but change can also be accessing a resource, engaging in help-seeking behavior, etc.
- Understanding readiness matters – not every student walks in ready to seek a resource or change their behavior
- Often success is defined by saying we provided the student with a referral to the resource we think they need
- A referral is only a successful intervention if the student is ready and able to engage with it

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Resistance to Change

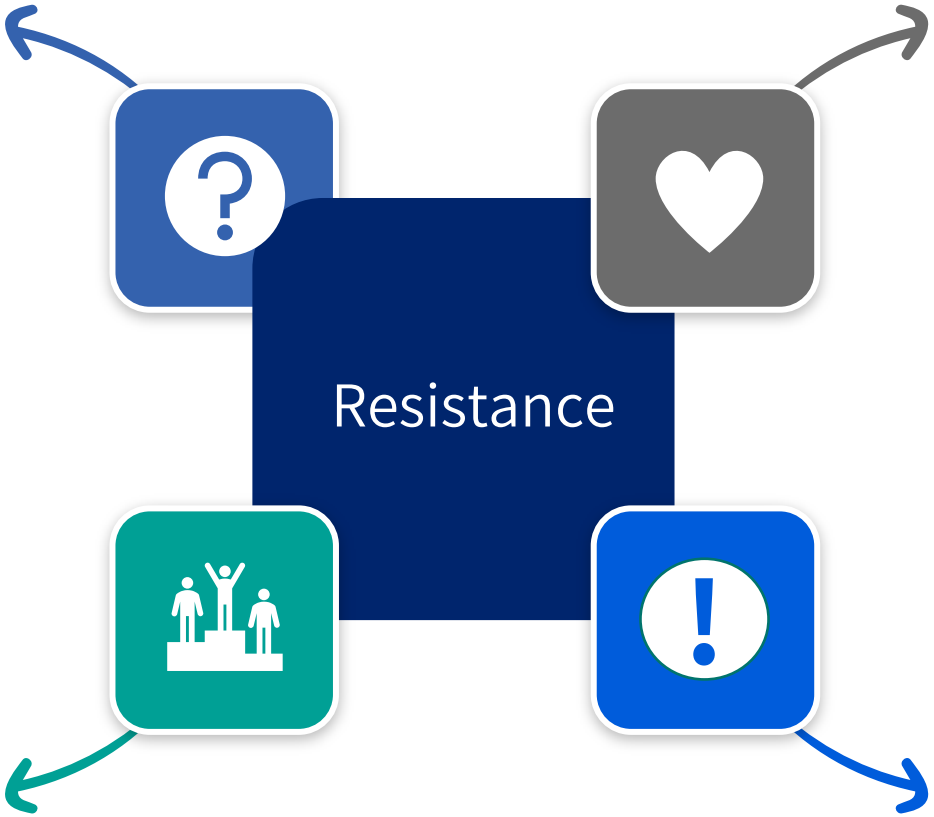
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Ambivalence is high

They are stuck in mixed feelings about the need for change.

Desire is low

They are uncertain about whether they want to make a change.



Confidence is low

They doubt their ability to change.

Importance is low

The benefits of change and the disadvantages of the current situation are unclear.

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Sustain Talk vs Change Talk

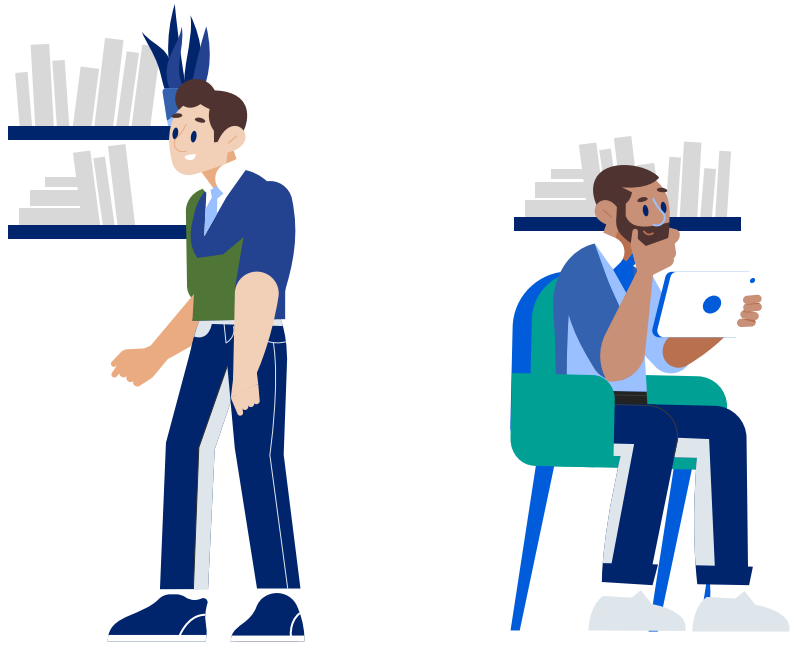
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Defining Sustain and Change Talk

Sustain Talk

Statements that support not changing a behavior.

Phrases and word choices indicate ambivalence, contentedness, fear, etc.



Change Talk

Statements that indicate movement toward change.

Phrases and word choices include consideration, desire, hope, etc.

Miller, W.R. & Rollnick, S. (2013) Motivational Interviewing: Helping people to change (3rd Edition). Guilford Press

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Readiness Matters

- Readiness might be issue specific. A student might simultaneously be:
  - In action regarding academics
  - In precontemplation regarding alcohol use
  - In contemplation regarding an unhealthy relationship

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Match the Helping Strategy to Readiness: Precontemplation and Contemplation

Stage	Student May Be Saying	Case Manager's Tasks
Precontemplation	"I don't think there's really a problem."	• Build rapport. • Ask open questions. • Avoid arguing. • Avoid overwhelming the student with resources
Contemplation	"Something might need to change but not yet."	• Explore ambivalence • Explore competing motivations. • Identify benefits and costs of change. • Discuss fears and barriers. • Develop discrepancies

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Match the Helping Strategy to Readiness: Preparation, Action, and Maintenance

Stage	Student May Be Saying	Case Manager's Taks
Preparation	"I know I need to do something. I just need to figure out how."	• Generate options • Identify resources • Break goals into small steps
Action	"I'm working on it"	• Reinforce progress • Troubleshoot obstacles
Maintenance	"I want to keep this going"	• Identify what is working • Anticipate setbacks • Gradually reduce case manager involvement

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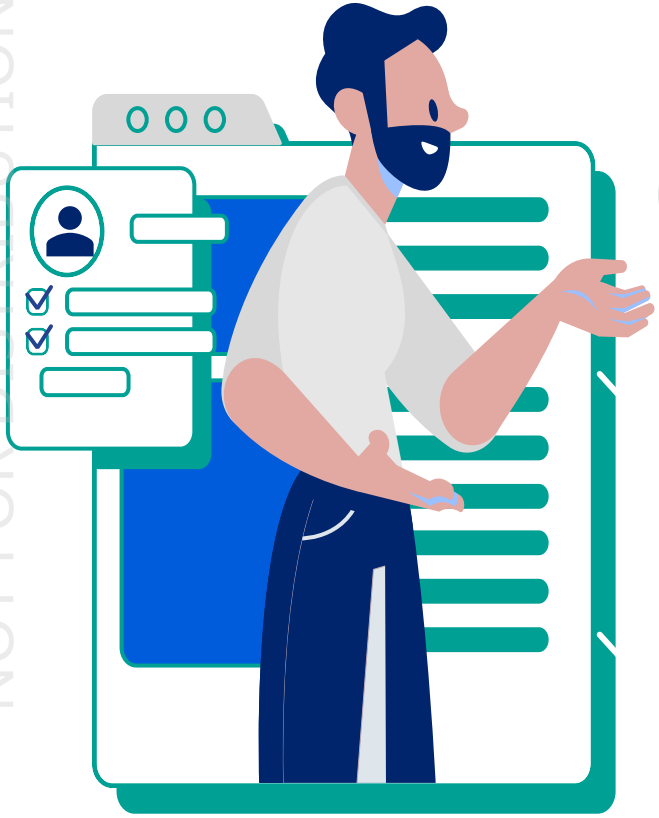
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Transactional vs Transformational Case Management

Based on where the individual is in their readiness to change and what their presenting concerns are, case managers can determine which case management approach would be most effective for moving them

Transactional Case Management

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Task-Oriented

Services aimed at completing tasks, making referrals, and moving students through a consistent process

Effecient

The goal is to move students through systems efficiently and connect students to resources quickly

Problem Resolution

The focus is on resolving immediate student needs and is reactive to a specific concern or incident

Transformational Case Management

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Relationship-Centered

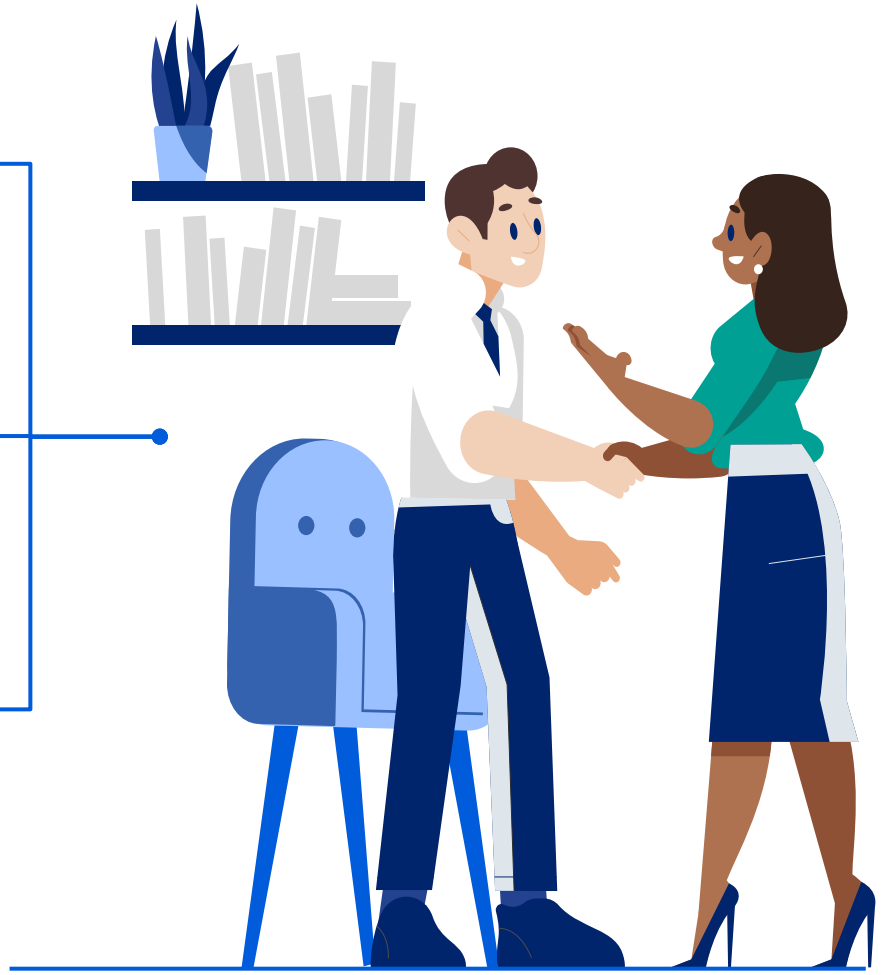
The approach leverages the CM-student relationships, relying on a mutual understanding of goals and values

Holistic

Rather than a focus on only resolving immediate needs, the focus in on supporting the whole student

Meaningful Engagement

Meaningful engagement and collaboration helps the student build the skills, confidence, and support systems needed for future challenges



Benefits of Each Approach

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Transactional Case Management

- Ensures timely response
- Helps manage large caseloads and limited resources
- Creates consistency, repeatability, and scalability
- Useful for crisis response and urgent concerns
- Can stabilize students quickly and efficiently

Transformational Case Management

- Builds trust and engagement
- Focuses on student growth, agency, and empowerment
- More holistically addresses student needs
- Encourages help-seeking
- Creates more meaningful staff-student interactions

Risks of Each Approach

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Transactional Case Management

- Students may feel processed instead of supported
- Interactions become task-focused rather than student-focused
- Underlying barriers may go unaddressed
- Staff may experience reduced meaning and frustration with their work

Transformational Case Management

- Requires additional time and emotional labor
- Can feel difficult in high-volume environments
- May not be appropriate or realistic for every interaction or case

Both Approaches Matter

Effective case management is NOT choosing one approach over the other

The goal is intentionally considering…

When is a transactional response appropriate?

When does a student need deeper engagement?



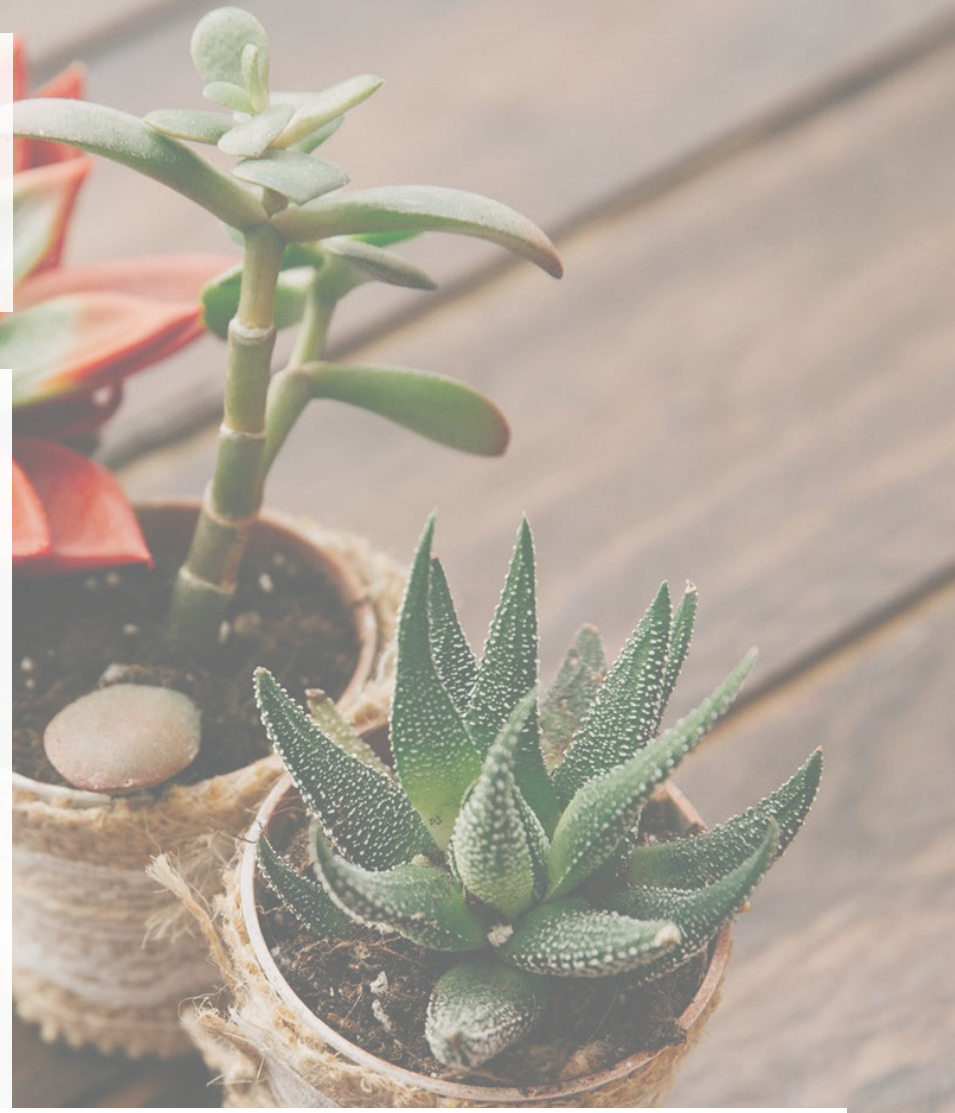
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The Skilled Helper

Putting it all together, the Skilled Helper provides a three-stage approach to structuring the case management relationship

Egan's The Skilled Helper



The helper should use a more consistent and structured process, rather than rely on "helper inspiration" to increase their efficiency and efficacy

Turn good intentions into actual results

- Used in helping relationships where the goal is to:
  - Achieve lasting change
  - Empower the individual to manage their own problems more effectively
  - Develop unused skills and opportunities

Source: Egan, G. (2006) The Skilled Helper: a problem management and opportunity development approach to helping (7th edition). Pacific Grove, CA

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The Skilled Helper: Stages

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Stage One: Exploration

Stage Two: Challenging

Stage Three: Action Planning

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Stage One: Exploration

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Stage One: Exploration

Goals:

- Build rapport
- Help the individual explore their situation
- Understand what is going on for the individual
- Listen and reflect without judgement

Strategies:

- Active listening
- Basic counseling skills (e.g., empathy, reflection, summarizing)
- Effective questioning
- Transtheoretical Model (Stages of Change)

Stage Two: Challenging



Stage Two: Challenging

Goals:

- Challenge existing views and problematic behaviors Encourage the individual to think about possible alternative approaches
- Establish what changes the individual wants
- Help the individual consider new possibilities
- Explore various options and obstacles to those options

Strategies:

- All of Stage One Strategies
- Motivational interviewing skills
- Reframing techniques
- Solution focused strategies
- Goal setting

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Stage Three: Action Planning

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Stage Three:
Action Planning

Goals:

- Take appropriate action to achieve goals
- Skill building and problem solving
- Develop new skills that can be applied to current problems and future difficulties

Strategies:

- Skills from Stage One and Two
- Direct teaching of skills: emotional regulation, coping skills, time management/academic skills, etc.
- Connection to resources

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Questions?

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