national healthy marriage resource center

Intake and Assessment: An Approach to Serving Couples

It may be helpful to have an intake process during enrollment to determine if a couple is appropriate for your marriage and relationship education class.

Researchers estimate that approximately 33% of all couples will seek either pre-marital or marital education services at some point in their relationship.[1] Furthermore, approximately 18% of the U.S. population has or will seek marital therapy for a problem related to their relationship.[2] How do these couples know which marriage/relationship education (MRE) service is right for them, or if they are better served by counseling/therapy? Unfortunately, they often do not. It is up to service providers to appropriately assess and refer couples.

There is not consensus among practitioners or researchers as to who is/is not appropriate for MRE. However, most MRE programs are not generally designed to work with highly distressed couples (*Retrouvaille* is one such program) or those requiring intensive intervention (for issues related to substance abuse, mental health problems, infidelity, etc.). In fact, MRE is typically considered a "prevention program"—providing couples with information and skills to avoid the pitfalls that may lead to chronic conflict and tension that requires more intensive interventions.

Some MRE practitioners have developed an intake process conducted during enrollment to determine if couples are appropriate for the MRE program. More than merely signing couples up for MRE workshops, the intake process includes an assessment component to determine if couples may need to be referred for more intensive services. The assessment typically serves one of two purposes:

1) To screen people in/out of the program (leading to referrals for those screened out); or

2) To inform a case manager of a couple's need for supplementary services (i.e. housing, child care, etc.)

This Tip Sheet is designed for program administrators operating multi-session (i.e. MRE delivered on a weekly basis for more than six weeks) MRE workshops (with or without a case management function) to highlight intake and assessment strategies.

Establish Clear Policies

Who is your program for? You may choose to screen couples based on parental status, marital status, or the prevalence of relationship issues such as family violence or mental health disorders. Once you have determined who your program is best equipped

[1] Johnson, et. al., 2002.
[2] Halford & Markman, 2008.

Once you have determined who your program is best equipped to serve, create guidelines that outline who the appropriate audience is (and is not) and the type of service provided. Based on the assessment, you may determine that another community-based MRE service or counseling is more suitable for a couple and make referrals.

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Assessment questions may cover the following topics:

- Mental health of each partner
- Drug/alcohol abuse by each partner
- Abusive/violent behavior (i.e. verbal, mental, emotional, monitoring, sexual, destruction of property) in immediate relationship or past relationship
- Feeling safe expressing thoughts with each other
- Presence of infidelity in the relationship
- Addictions (i.e. substance abuse, gambling, pornography)
- Recent involvement in the child welfare or criminal justice system
- Stress level

Program administrators must determine which relationship issues are reasonable for participation in the program and which require a referral. It is helpful to have a policy in place that addresses the referral process between your agency and the resource to which you are referring the couple.

Upon meeting a couple for the first time, couples may not fully disclose sensitive relationship issues. Most disclosures occur when trust has been developed between the individual/couple and the program/facilitator. A follow-up assessment at mid-point within the workshop series may be beneficial.

Create Referral Partners

Programs should have working relationships in place with other community resources that may serve as referral sources. Collaborating with experts such as domestic violence providers, substance abuse counselors and mental health therapists will ensure that a program has a strong referral base should the need arise. Make sure your program has a list of resources readily available to all staff members and that it is frequently updated. If your program has a case management component, you may want to create a follow-up process between the case managers and the referring organization. Various agencies can not disclose information about your referrals due to confidentiality reasons. Some partners create disclosure forms for the participants

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that, when signed by the person/couple you are referring, allow for information to be exchanged between your agency and another.

Tell Couples about the Assessment

The enrollment or registration process is typically the most relevant time to incorporate a screening tool to determine if the couple is a good fit for the program. The time it takes to complete the enrollment process—including conducting the assessment—should be explained to couples up front. They should also be made aware of the fact that the program is not for everyone. Help them understand that the assessment is a tool used to help determine who is best suited to participate (or to support your case management function). This process should take a reasonable amount of time to complete so that it doesn't become a barrier for participants.

Training and Practice

Staff must be equipped to conduct an assessment in a non-judgmental way, especially if you are determining that couples are not appropriate for your program. Staff training is essential to this process operating smoothly. They must be trained on what indicators would result in referring a couple to more intensive services or therapy. Examples of training for staff might include: domestic violence, substance abuse, mental health disorders, etc. They should be trained on what questions to ask, how to probe further, when it is most appropriate to separate men and women for assessment, when to seek help from a supervisor and how to notify couples of their entry into a program or make a referral. They must also be well-versed in what services your referral partners offer. Finally, they must know the correct protocols both within your agency and inter-agency when making a referral and, when appropriate, following up after the referral has been made.

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A standardized process for explaining the program (and its limitations) helps staff treat all potential participants equally. How do you know if your staff is delivering a consistent message? Practice, practice, practice. Role play is an effective activity to get staff comfortable with asking sensitive questions. Frequent supervision and monitoring of staff as they implement an assessment tool are also great ways to identify areas where further practice is needed.

It is important for programs to understand and acknowledge their strengths and limitations. Implementing a process to identify couples who may not be a good fit for the program and having a plan to refer them ensures that these couples get the help they need. It also ensures that the MRE program is reaching the participants for whom it is designed. The tips mentioned above are intended to help program administrators implement policies and protocols addressing intake/assessment, staff and facilitator trainings on the subject, and resources for appropriate referrals.

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