



Case Management

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Welcome!



Icebreaker



Expectations

What do you hope to take away from this training?



Training Overview



What *Is* Case Management?

On a piece of paper, write down your personal definition of case management.

You have 3 minutes.

Definitions

- A method of providing services whereby a professional social worker collaboratively assesses the needs of the client and the client's family, when appropriate, and arranges, coordinates, monitors, evaluates, and advocates for a package of multiple services to meet the specific client's complex needs.
- The organization and coordination of a network of formal and informal activities, services, and supports designed to optimize the well-being of a person.
- An approach to service delivery that attempts to ensure that clients with complex, multiple problems receive all the services they need in a timely and appropriate fashion.

Definitions

- Assisting clients to receive the services they need by linking clients to both the formal and informal helping-service networks within a community and then to follow up to ensure that the client has actually received the resources and social services required.
- A collaborative process of assessment, planning, facilitation, care coordination, evaluation and advocacy for options and services to meet an individual's and family's comprehensive needs through communication and available resources to promote effective outcomes.
- The linking of a consumer to the service system and coordinating the various system components in order to achieve a successful outcome. Case management's primary goal is service provision for the consumer, not management of the system or its resources.

Why Do We Use A Case Management Approach With Our Clients?

On a piece of paper, create a list of reasons we use a case management approach with our clients as opposed to a less structured approach. What are the benefits of case management?

You have 3 minutes.

What Are The Overriding Principles Of Case Management?

On a piece of paper, create a list of some of the most important principles of case management.

You have 3 minutes.

Principles Of Case Management

- Building trusting relationships - understanding, empathetic, pleasant, able to put someone at ease
- Using evidence-based practice - current client needs, situation, and environment; best available research evidence; client values and preferences; case manager's judgment and expertise
- Empowering your clients - What do you want and expect from assistance? What do you hope to have happen in relation to your current problem situation? What do you believe are your strengths?

Help your client define their own story!

How Do I Encourage An Unmotivated Client?

- People want STUFF!
- Make a “What I Want” list
- Make a “What Stinks” list
- Misery often inspires real change
- Echo your client’s words back to them
- Have them share their success stories

What Are The Primary Components Of Case Management?

On a piece of paper, list the primary steps or components of the case management process.

You have 3 minutes.

Primary Components Of Case Management

- Intake
- Strengths and Needs Assessment
- Service Planning
- Monitoring and Evaluation

Intake

Intake is the initial meeting between a case manager and a new client. The case manager uses this time to gather demographic information about the client, identify any immediate needs, and begin to establish trust and build a relationship. This first interaction is helpful for a case manager to determine if a client would benefit from the services your organization offers. If they would, they then move on to assessing the client's individual needs and strengths. If their needs fall outside your organization, the case manager works to identify and refer the client to an outside community resource.

Strengths and Needs Assessment

The Strengths and Needs Assessment stage builds on the information collected during the Intake stage, going into greater depth on the client's individual strengths, challenges and goals. During this stage, a case manager's primary objective is to identify a client's strengths, problems, interests, and risks to success. While every client goes through this stage when they first come to an organization, it's important to re-assess over time as needs and circumstances often change.

Service Planning

The Service Planning stage is particularly important to the success or failure of a client. A case manager establishes specific goals and the actions that will be taken to meet those goals. The result of this goal-setting process is a case plan inclusive of outputs and outcomes that will measure a client's success. A service plan should be both achievable and measurable.

Monitoring and Evaluation (Tracking and Follow-Up)

Evaluation is critical to understanding the impact specific programs and services have on a client. Using the output and outcome metrics defined in the previous stages, a case manager should continuously monitor and evaluate a client's progress. Evaluation and data ensure client success is quantified and qualified rather than simply anecdotal.

The “Table Group” Concept

- Each table selects a Reporter, a Recorder, and a Timekeeper
- The Reporter shares their table group’s finding and ideas with the rest of the group
- The Recorder writes down their group’s findings and ideas on paper or on their group’s flip chart
- The Timekeeper ensures their table group completes assignments on time

You have 1 minute to make these assignments for your table group!

Component 1: Intake

- At your table groups, have a brief discussion about your current intake processes and what works well about that process. Have your recorder document your findings on the left side of your flip chart
- Then, have another discussion about what is not working well with your current intake processes and document those findings on the right side of your flip chart

You have 5 minutes.



How Can We Make Our
Intake Process Better?

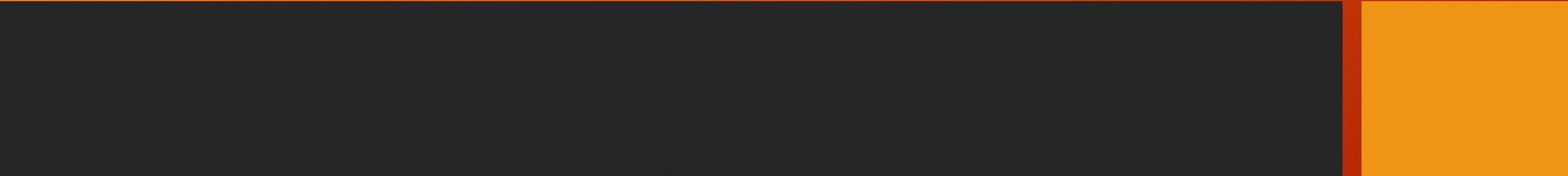
What Tools Do You Use To Conduct Intake?



Component 2: Strengths and Needs Assessment

- At your table groups, have a brief discussion about your current strengths and needs assessment processes and what works well about that process. Have your recorder document your findings on the left side of your flip chart
- Then, have another discussion about what is not working well with your current strengths and needs assessment processes and document those findings on the right side of your flip chart

You have 5 minutes.



How Can We Make Our
Strengths and Needs
Assessment Process Better?

What Tools Do You Use To Conduct Your Strengths and Needs Assessments?



Component 3: Service Planning

- At your table groups, have a brief discussion about your current service planning processes and strategies. What works well? Have your recorder document your findings on the left side of your flip chart
- Then, have another discussion about what is not working well with your current service planning processes and strategies and document those findings on the right side of your flip chart

You have 5 minutes.

How Can We Make Our Service Planning Process Better?

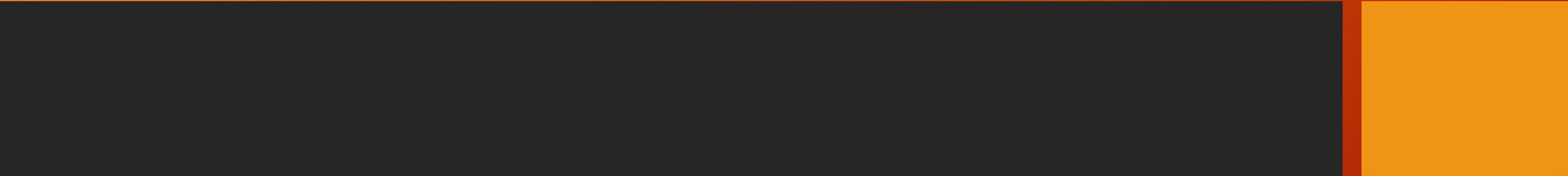
What Tools Do We Have At Our Disposal To Aid In The Service Planning Process?



Component 4: Monitoring And Evaluation (Tracking and Follow-Up)

- At your table groups, have a brief discussion about your current approach for monitoring and evaluation. What works well? Have your recorder document your findings on the left side of your flip chart
- Then, have another discussion about what is not working well with your current approach and document those findings on the right side of your flip chart

You have 5 minutes.



How Can We Make Our Monitoring and Evaluation Process Better?

What Tools Do We Have At Our Disposal To Aid In The Monitoring and Evaluation Process?



Effective Interviewing Techniques



Interviewing Your Case Management Clients

At your table groups, brainstorm a list of case management interviewing “do’s and don’ts” and list them on your flip charts, “do’s” on the left and “don’ts” on the right.

You have 7 minutes.

Open-Ended Questioning

What is an open-ended question?

An open-ended question is a question that cannot be answered with a "yes" or "no" response, or with a static response. Open-ended questions are phrased as a statement which requires a response. The response can be compared to information that is already known to the questioner.

Open-Ended Questions Role Play



Closed-Ended Questions

- Are you originally from Georgia?
- Are you interested in going back to school?
- Were you laid off from your last job?
- Do you have any dependents?
- Do you have reliable childcare?
- Do you have transportation?
- Do you feel like you have good computer skills?
- Are you willing to relocate?
- Do you have any current or past legal issues?
- Do you have any hobbies?

Closed-Ended Questions

- Did you like your last job?
- Do you have any particular strengths that will ensure you are successful?
- Do you have any barriers that will prevent you from being successful?
- Do you have any occupational licenses or certifications?
- You made \$25,000 annually on your last job? Is that salary acceptable for a new job?
- Do you have your high school diploma or GED?
- Do you have a valid driver's license?
- Do you have a place to live?
- Do you have a source of income while you're in training?
- Are you able to keep your medical and utility bills paid?

Leveraging Community Resources For Your Clients



Table Group Exercise

Your client has a need that your organization cannot directly resolve. If this need goes unmet, your client may not be able to successfully meet their training and employment goals.

At your table group, brainstorm a list of challenges your customers frequently encounter that your organization is unable to resolve directly.

You have 5 minutes.

Table Group Exercise

Now that you've identified your client's needs, create a list of service providers in your respective communities that can assist you and your clients in addressing those critical needs. Be specific—identify the service providers by name and the kinds of services they provide.

You have 5 minutes.

Case Studies



Individual Exercise

Five case studies will be displayed one at a time. For each case study, please make note of the following:

- Possible strengths (clearly-stated or implied)
- Possible barriers/challenges (clearly-stated or implied)
- Specific local resources available to help address potential barriers/challenges

You will have five minutes for each case study.

Case Study #1

Mary Logan is a 41 year-old divorced mother of two adult children who retired in January 2018 after serving 20 years with the Army. She was honorably discharged and served in Iraq and Afghanistan.

She has not held a job since. Mary admits that she's had considerable difficulty finding a job since her retirement because she is a chronic pot smoker and cannot pass a drug screen. She served as a medic in the Army but no longer wishes to do this kind of work, though she is open to retraining for another job in the medical field. Mary currently lives with her mother but would like to move out and be fully self-sufficient.

Case Study #2

George Karl lost his job at as a senior millwright at Northwest Plywood Company when the local plant closed in early 2019. He supervised numerous, less-experienced maintenance workers during his tenure there. Mr. Karl worked there 28 years and is 57 years old. He has been working temp jobs to make ends meet but needs steadier employment. Mr. Karl would like to go to school to pursue a “brain” job instead of a “brawn” job because of his persistent back problems, though he’s not sure what kind of “brain” job might be right for him. He lacks the funds to pay for school and would like to work part-time while he is in training. He and his wife own their own home and are mortgage-free.

Case Study #3

Mark Stuart is a 19-year old high school dropout who completed the 10th grade. He left school when his mother became permanently disabled and needed full-time care. Mark has worked part-time fast food jobs but needs a well-paying, full-time job to support himself and his mother. He does not have a car but uses his bicycle to get around town. He played baseball and basketball when he was in school and made straight As in all his science classes. He makes a little extra money on the side doing minor car repairs, as his grandfather was an excellent “shade tree” mechanic and taught him the ropes.

Case Study #4

Celeste Fairchild, 33, is a recently-divorced mother of three children ages 13, 11, and 5. She was a housewife for 14 years and has never worked outside the home. She wants to go to school to train to be a radiologic technician but does not have reliable childcare and her housing situation is unstable and month-to-month. She has been diagnosed with depression but is currently unable to afford treatment and medication. She receives food stamps for her children but her eligibility will soon run out.

Case Study #5

Steven Willingham, 22, was laid off from his job at Altamaha Textiles earlier this year. He had worked there for just over two years as a machine operator when it was announced the plant was closing and moving to Southeast Asia. Mr. Willingham has a GED and thinks he might like to become an over-the-road truck driver. He currently has a regular Georgia driver's license, which he just got back after paying off a reckless driving fine he received as an 18 year-old. He has one child and is three months behind on his child support.

Writing Quality Case Notes

A Few Things To Remember

- A record of the participant's journey through the process
- Identify the client's MOTIVATORS
- Summarize, interpret, and strategize
- Record information related to outcome goals
- Don't duplicate information
- Facts only—no opinions!
- Include your client's voice (eliminate the word "told")
- Conduct a thorough, quality assessment
- Ask open-ended questions

Writing Quality Case Notes

A Few Things To Remember

- Identify strengths—end the “barrier” obsession!
- Remember—barriers don’t define a person
- Avoid the word “skills”—“tell me what you do well”
- Write in the active voice, not the passive voice
- Respect and ensure your client’s confidentiality

Individual Exercise

We will display bullet-pointed details from three different client meetings. These meeting details will be displayed one at a time. Please compose a case note entry based on the details provided, applying the principles of writing good case notes.

You will have five minutes to create each case note entry.

Client #1 - Roderick Nicoara

- Intake appointment scheduled for 9am
- Client arrived at 9:45am, said he overslept and had to catch a ride
- Client appeared drowsy and nodded out several times during the meeting
- Client's speech was slurred and was observed swallowing some sort of pill
- Assisted client with online registration process; client seemed to struggle with completing the registration process
- Client did not have government-issued photo ID and other documentation to determine eligibility and was advised to provide them as soon as possible
- Client indicated he needed help creating a resume because has never done one before; directed customer to Employ Georgia and assisted him with the registration and resume creation process

Client #2 - Beth Grimes

- Strengths and Needs Assessment appointment scheduled for 2pm
- Client arrived at 1:45pm
- She was properly dressed and arrived with her two small children, ages 2 and 4
- Beth had planned to leave the children with a sitter but her plans fell through at the last minute
- Ms. Grimes feels she may want to study to be an LPN but admits she doesn't like blood and doesn't know if she's truly a good match for that kind of work
- Beth feels she has a nurturing spirit, is hard-working, and did well in her health occupation courses in high school, making straight A's. She worries about having adequate child care while she's completing school
- Administered the "My Next Move" to help determine if Ms. Grimes's interests and skills truly align with a career as an LPN

Client #3 - Frank Hallman

- Monitoring and Evaluation appointment scheduled for 3pm
- Client arrived at 3:15pm and seemed agitated
- He arrived with his girlfriend, who seemed a bit upset
- Frank admitted he was struggling with a couple of his HVAC courses and was missing a number of classes
- He and his girlfriend just learned they are expecting and they do not have health insurance. Mr. Hallman feels like he may have to quit school to find a full-time job even though he is just two quarters short of graduation
- Referred Frank's girlfriend to DFCS for assistance and helped Mr. Hallman identify some full-time job openings that don't conflict with his class schedule

Client #4 - Wes Nichols

- Follow-up appointment scheduled for 11am
- Client arrived at 10 minutes early
- Client stated his training is progressing well and he made straight As this past quarter/semester
- Client reports he has no challenges or impediments to successfully completing training at this time
- He did express some concerns about finding job leads since he will graduate by the end of the summer
- Referred him to LinkedIn and Employ Georgia so he can upload his resume and begin to identify job leads

GEO VOS, Policies, and Procedures



Tracking And Follow-Up

- How do you currently reach out to your clients to follow up and track their progress?
- On a scale of 1-10 with 1 being “not effective at all” to 10 being “extremely effective”, how would you rate the effectiveness of these methods?
- How do you use social media in following up with your clients? What works and what doesn't?
- How does your follow-up strategy differ with Millennials as compared to Gen Xers and Baby Boomers?

Most Popular Social Media Sites By Generation

- Teens - 1) Snapchat 2) Instagram
- Millennials - 1) Facebook 2) Instagram
- Gen X - 1) Facebook 2) Instagram
- Baby Boomers - 1) Facebook 2) Pinterest

Questions?

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