Wilson-Fish Case Management Training

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So...Why Are We Here Today?

Training for staff working in Wilson-Fish resettlement programs

WF program directors & state coordinators requested training on case management issues
- ISED Solutions is the technical assistance provider for ORR/WF

This webinar has been adapted from a full-day, on site case management training program
The Flight Path of the Refugee
From homeland to the United States
Who is a Refugee?

- A refugee is a person who "owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion, is outside the country of his nationality and is unable or, owing to such fear, is unwilling to avail himself of the protection of that country." (Article 1A, 1951 Convention Relating to the Status of Refugees)
What has the refugee experienced before being interviewed and accepted for resettlement by the US Government?
Reasons for Flight

- War
- Armed Conflict within a country
- Ethnic cleansing
- Targeted persecution
- Historic persecution
US Refugee Program

- US Department of State (PRM)
- US Department of Homeland Security (USCIS)
- US Department of Health & Human Services (ORR)
President
Cabinet & NSC
US Refugee Program

Dept of State
PRM

Dept of Homeland Security
USCIS

Dept of Health & Human Services
ORR
US Department of State

PRM

- Determines which groups of displaced persons will be considered eligible to apply to the program
- Determines the priorities for processing within each program
- Funds overseas refugee processing, medical screening, transportation
- Funds overseas cultural orientation
- Funds initial refugee resettlement (R&P)
- Coordinates the US Refugee Program (and placement)
US Department of Homeland Security
USCIS

- Interviews all refugee applicants
- Decides, on the basis of documentation and interview, whether or not the person meets the standards for refugee status
- Via an interagency check, decides when refugee is travel ready
US Department of Health & Human Services

ORR

- Funds 8 months of refugee cash/medical assistance through States (originally 36 months, 18, 12, now 8)
- Develops and funds supporting programs for refugees – funding through states, resettlement agencies, ethnic community based organizations.
- Coordinates refugee placement with PRM (Refugee Act)
More Information?
Check out these sites:

- [http://www.isedsolutions.org](http://www.isedsolutions.org)
- [http://www.state.gov/g/prm](http://www.state.gov/g/prm)
Part One

The Three Dimensions of Case Management
This training will consider the refugee in the context of the resettlement process.
Definition of Case Management:

The organization and coordination of a network of formal and informal activities, services, and supports designed to optimize the well being of a person.

Source: Moxley, Practice of Case Management (1989).
Definition of **OPTIMIZE**

to make as **effective** or **functional** as possible
Which means……...

• Reducing barriers
• Enhancing strengths

“only what is needed”
DANGER: Curves Ahead

There are no Straight Lines in Case Management!!
Three Dimensions of Case Management

- Relationship
- Documentation
- Supervision & Quality Control
Relationship
Documentation
Supervision & Quality Assurance
Dimension 1: Relationship

Goal is to enable the client to believe that:

- the **case manager** is someone who understands and can be trusted
- the **agency** is concerned about his/her well-being
It’s all about the relationship
Relationship is best accomplished when the case manager...

- Maintains professional boundaries
- Maintains appropriate communication
- Creates a relationship of trust
Professional Relationship Standards

For Professionals & Paraprofessionals

- Confidentiality
- No Romantic/sexual involvement
- Limits for after hours & for office hours
- Clear statement of case manager’s role
- Gender, family issues, and appropriate referrals (education & referral)
- Minimize “projection”
What must a case manager know…

- Case management system
- Local resources/TA (a list?)
- Services available on site (a list?)
- Cultural sensitivity (profiles?)
## Cultural Sensitivity  
(Cultural Orientation)

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Six Direct Service Roles

* Case Manager Exercises
  High Level of Direction

* Client Exercises High
  Level of Self Direction
Case Work is Stressful!!!!
Reducing Stress in the Client/Caseworker Relationship

- Clear agency guidelines for appointments, after hours contact
- Team meetings to discuss caseload, time, challenges, problems
- Ongoing staff development and training for case workers
- Monitor staff morale
People are more important than casefiles, BUT...
Purpose of Documentation

*Internally:*
- Assure quality services
- Share information among staff

*Externally:*
- Meet Federal standards
- Meet agency standards
- Allow auditors to verify that funded services were provided
Documentation: WF Requirements

Intake information
- Eligibility determination, case member data

WF Enrollment
- Client Rights and Responsibilities
- Resettlement/Self-Sufficiency Plan
  - Steps, timeframes, barriers, strategies, budget to reach self-sufficiency
- Documentation of services, contact, progress: case notes
- Financial: cash transactions, receipts, proposed budget and actual expenditures
- 240 day employment status
- Case closure/termination

Written polices and forms must be translated in refugee’s language

* See WF 2010 funding announcement, pp 7-8
Documentation is…

Chronological description of:

- Background information
- Activities and use of services
- Any changes in family situation
- Actions, reactions, and achievements of the client (case notes)
Integration of Client Documentation

Documentation should be an unbroken chain of information
Integration of Client Documentation

Documentation should link the assessment with the training or service plan:

1. Identified barriers should be listed with strategies to overcome them
2. Identified strengths should be listed with strategies to build upon them
Integration of Client Documentation

Case Notes should describe:

✓ how client is progressing in relation to the plan

✓ efforts of case manager & client in relation to the plan
The 5 C’s of Good Case Notes
Adapted from Project SOAR/IRC San Diego

- Comprehensive
- Chronological
- Consistent
- Confidential
- Case management
Follow-up notes and updated plans should reflect the client’s & agency’s **progress** toward:

- Reducing Barriers
- Enhancing Strengths
Dimension 3: Supervision & Quality Assurance

✓ The case manager supervisor **advocates** for the **refugee**

✓ The case manager supervisor **supports** the **case managers**
Dimension 3: Supervision & Quality Assurance

The Resettlement Director (Supervisor of Case Managers):

- Supervises Case Managers
  - Job descriptions
- Holds regular case management meetings
- Reviews case files for quality & conformity
  - Training
- Regularly reviews Client Services
  - Are these the right services?
Dimension 3: Supervision & Quality Assurance

Supervision ensures that:

Quality services are provided

Clients are getting what they need to move toward goals

Appropriate assessments, plans, referrals, and monitoring/coordination are occurring

The agency effectively and efficiently provides the level of care needed by the client population
Dimension 3: Supervision & Quality Assurance

- Qualified Staff
- Services to Clients
- Plans & Referrals
- Strong Assessments
- Required level of care
Six Stages of Case Management

1. Engagement
2. Assessment
3. Planning & Goal Setting
4. Intervention
5. Monitoring & Evaluation
6. Case Closure
Thank You!
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