



# Wilson-Fish Case Management Training

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**ISED**SOLUTIONS  
INSTITUTE FOR SOCIAL AND ECONOMIC DEVELOPMENT

# So...Why Are We Here Today?

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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

2012

# 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)

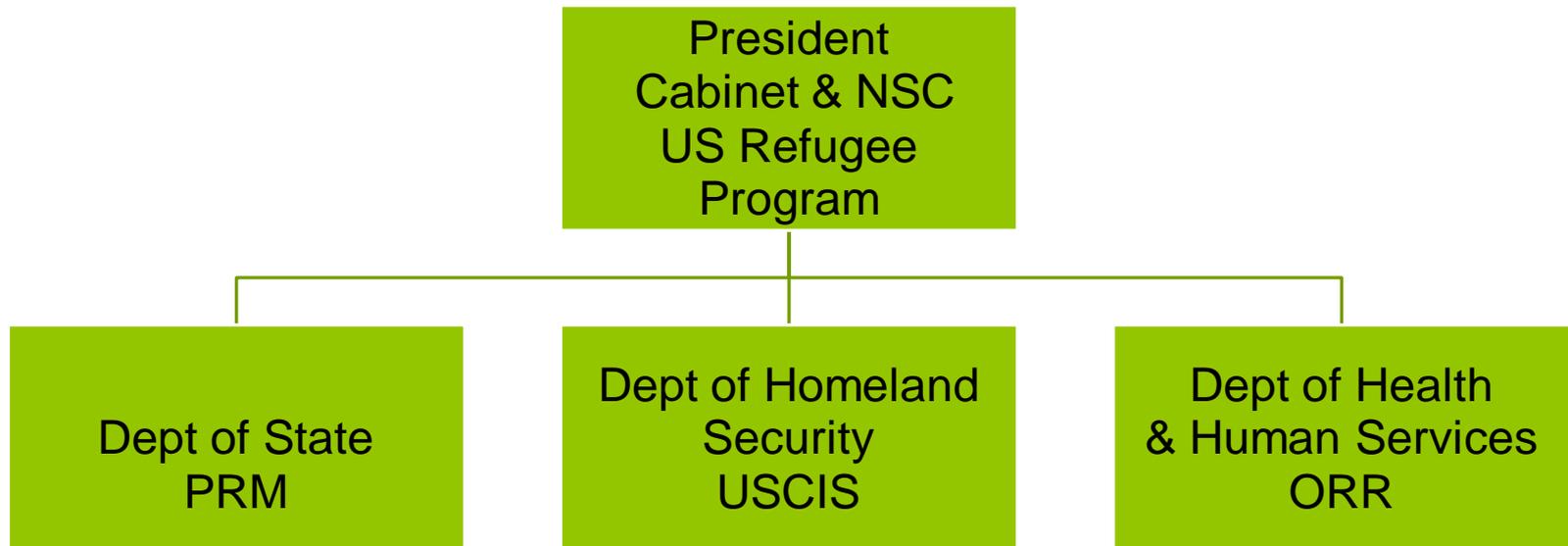
What has the refugee experienced before being interviewed and accepted for resettlement by the US Government?

# 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)



# US Department of State

## PRM

- Determines which groups of displaced persons will be considered for 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.acf.hhs.gov/programs/orr>
- <http://www.state.gov/g/prm>

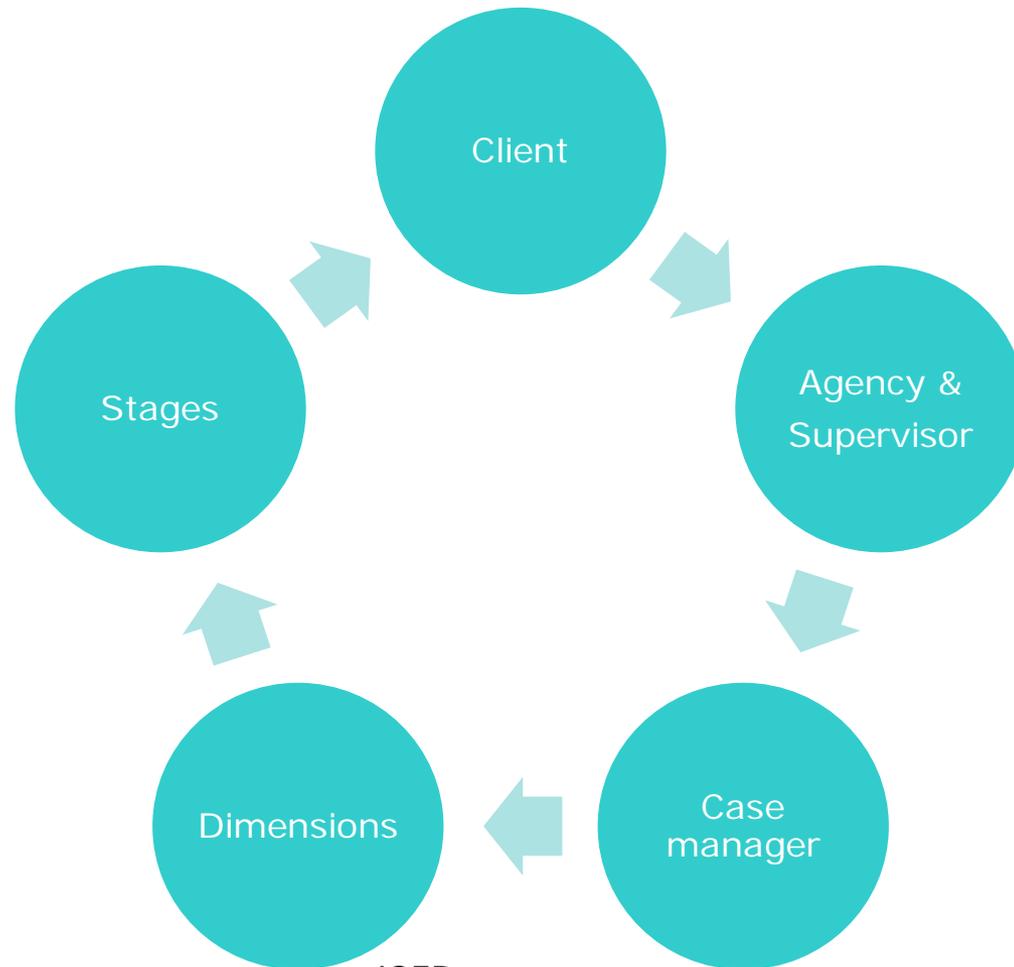
# Part One

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## The Three Dimensions of Case Management

# This training will consider the refugee in the context of the resettlement process.

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## **Definition of Case Management:**

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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*

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to make as **effective**  
or **functional** as  
possible

# Which means.....

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- Reducing barriers
- Enhancing strengths

**“only what is needed”**

# DANGER: Curves Ahead

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There are no  
Straight Lines in  
Case Management !!

# Three Dimensions of Case Management

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# Relationship

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# Documentation

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# Supervision & Quality Assurance

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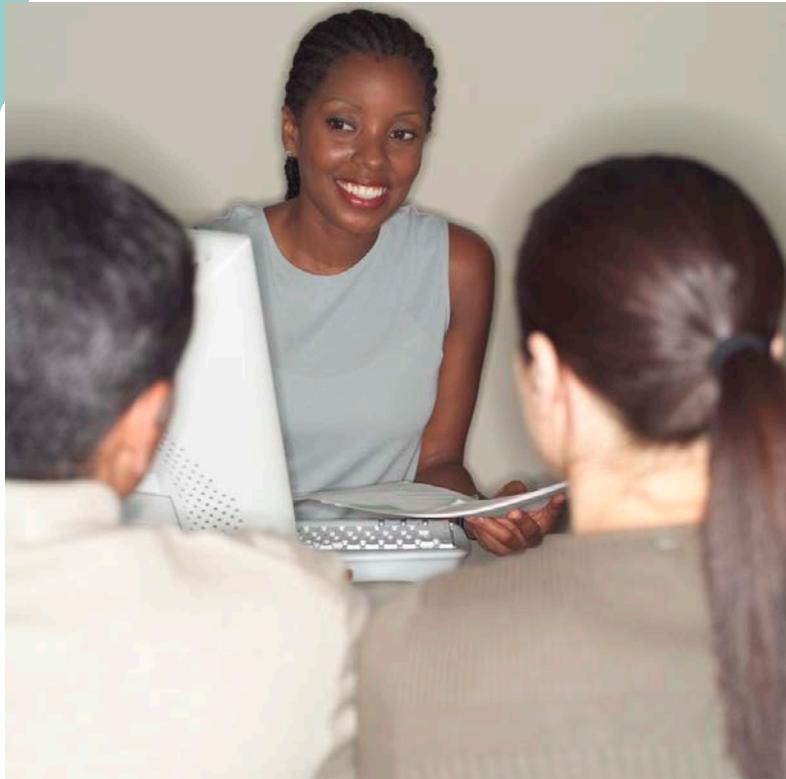


# Dimension 1: Relationship

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*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



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It's all  
about the  
**relationship**

# Relationship is best accomplished when the case manager...

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Maintains professional boundaries

Maintains appropriate communication

Creates a relationship of trust

# Professional Relationship Standards

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## 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...

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- 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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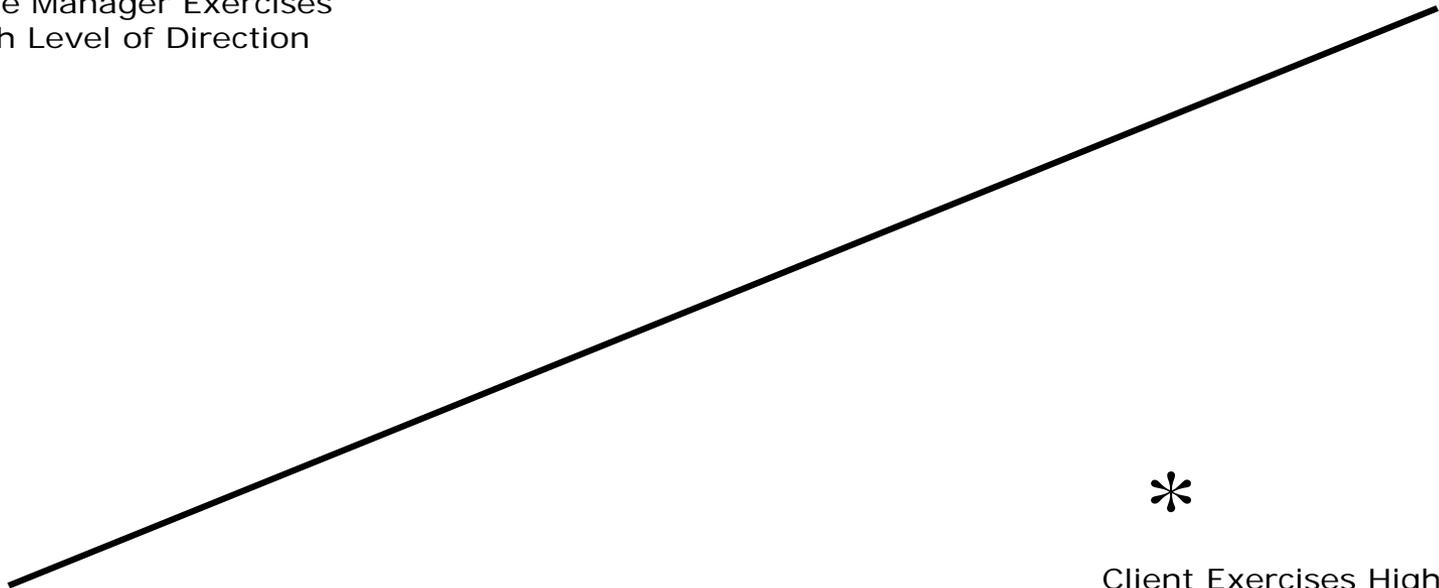
Value	Other Cultures	US Culture
Age		
Time		
Gender		
Marriage		
Rule of Law		
Family/ Community		
Courtesy/Social Interaction		
Planning		

# Six Direct Service Roles

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Case Manager Exercises  
High Level of Direction



Client Exercises High  
Level of Self Direction

Implementer

Teacher/Instructor

Guide/Collaborator

Processor

Information Specialist

Supporter

# Case Work is Stressful!!!!

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# Reducing Stress in the Client/Caseworker Relationship

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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

# Dimension 2: Documentation

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People are  
more  
important  
than  
casefiles,  
BUT...



# Purpose of Documentation

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## *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

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- 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, <sup>ISED</sup> pp 7-8

# Documentation is...

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## 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

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**Documentation should be  
an unbroken chain of  
information**



# Integration of Client Documentation

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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

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*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

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Comprehensive

Chronological

Consistent

Confidential

Case  
management

# Integration of Client Documentation

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- Follow-up notes and updated plans should reflect the client's & agency's progress toward:

Progress toward

- Reducing Barriers

Progress toward

- Enhancing Strengths

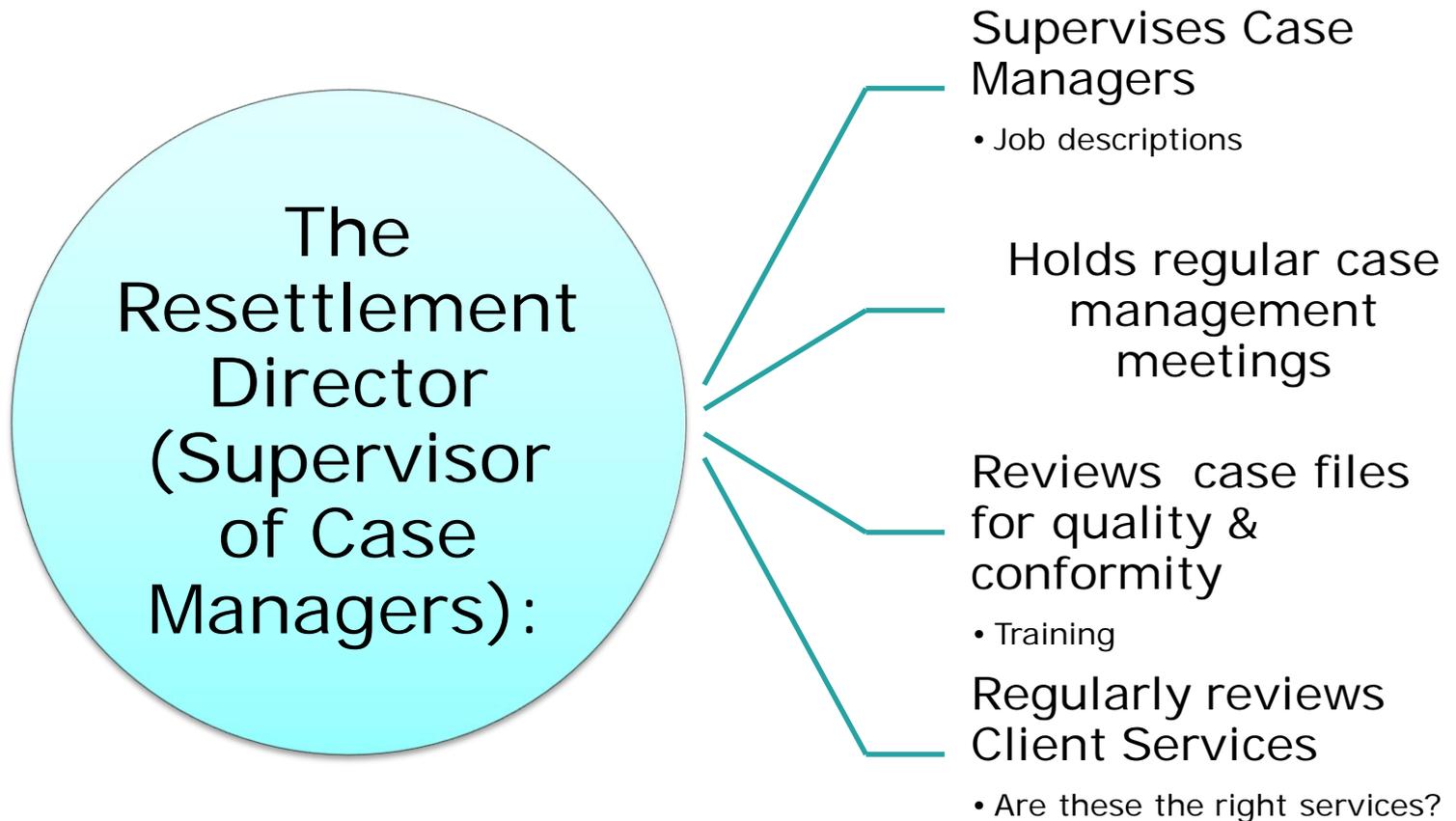


## Dimension 3: Supervision & Quality Assurance

- ✓ The case manager supervisor **advocates** for the **refugee**
- ✓ The case manager supervisor **supports** the **case managers**

# Dimension 3: Supervision & Quality Assurance

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# Dimension 3: Supervision & Quality Assurance

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Supervision ensures that:

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Quality services are provided

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Clients are getting what they need to move toward goals

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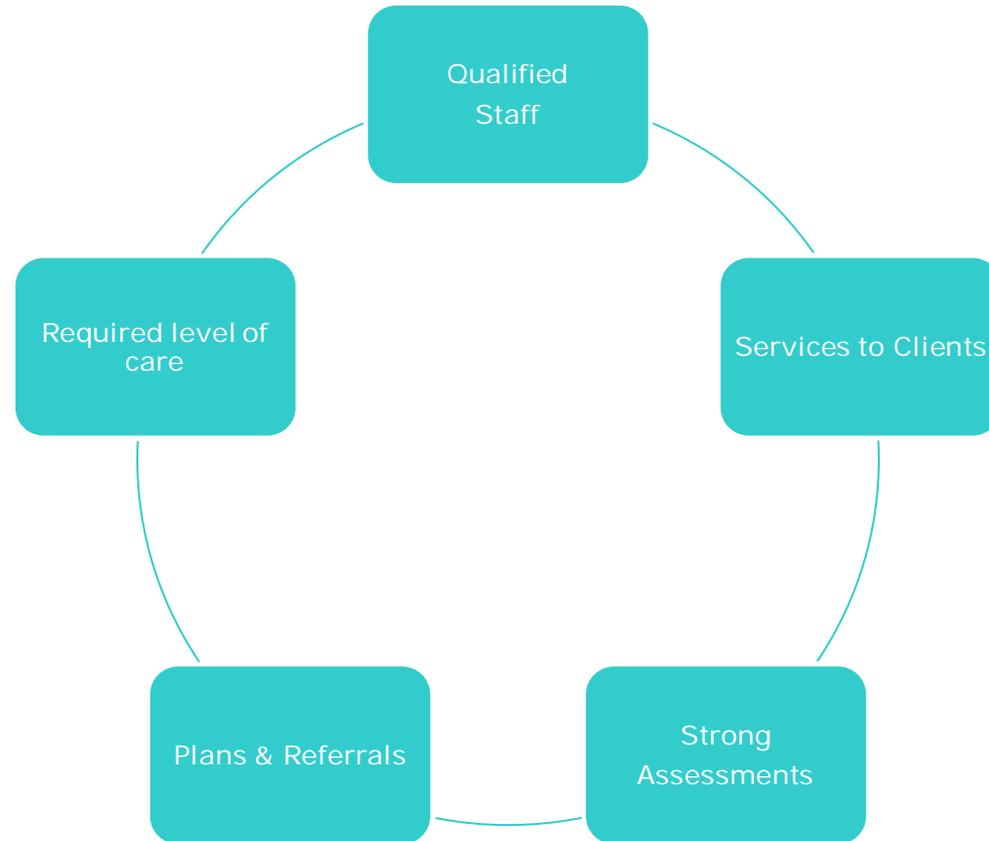
Appropriate assessments, plans, referrals, and monitoring/coordination are occurring

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The agency effectively and efficiently provides the level of care needed by the client population

# Dimension 3: Supervision & Quality Assurance

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# NEXT WEEK.....

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## **Six Stages of Case Management**

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



*Thank You!*  
*For more information, please contact:*

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