



Wilson-Fish Case Management Training

May 2012

Peggy Gilbert/Meredith Lee

Institute for Social and Economic Development (ISED) Solutions

ISEDSOLUTIONS
INSTITUTE FOR SOCIAL AND ECONOMIC DEVELOPMENT

Part Two

The Six Stages of Case Management

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

Three Dimensions of Case Management

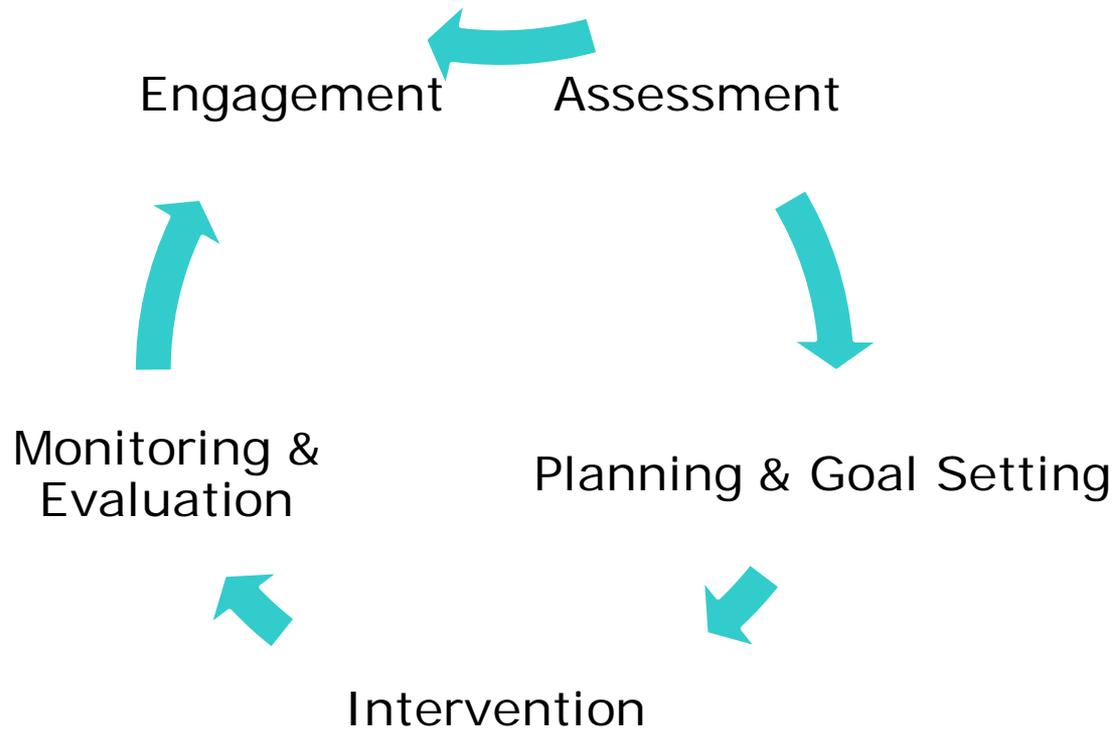




Six Stages of Case Management

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

Process of Case Management is CONTINUOUS



Stage 1: Engagement

What does engagement mean?

- to obtain and hold the attention of;
 - to pledge or promise;
 - to interlock or cause to mesh
- (The American Heritage Dictionary)*



Engagement

Engagement is both
a **process**
and
an **outcome**

The Process of Engagement



Balancing

Your support and
help

with

Your professional
authority

to...

The Outcome of Engagement

...**produce** an ongoing case manager and client **relationship**

that

results in the pursuit and accomplishment of agreed upon **goals**.



Engagement in the Wilson-Fish Context

When ...Where...How?

1. Outreach
2. Eligibility determination
3. Enrollment

Effective Engagement

Involves...

- Tuning into self and client
- Focused/ active listening
- Clarification of role and purpose
- Respect
- Clear and accurate response to client questions
- Honesty
- Dependability



Effective Engagement

- Identification and support of client strengths
- Seeking to understand the client's point of view
- Culturally sensitive practice
- Connecting program goals with client goals
- Investment in client success
- Outcomes-oriented practice
- Regular feedback
- Confrontation when necessary
- Appropriate use of authority

Avoiding Authority Extremes



Too "soft"

Stance is submissive

Fear of conflict

Ambivalent about client potential

Minimizes authority

Goal for client: cooperation

Style is inconsistent

Avoiding Authority Extremes



Too “tough”

Stance is superior

Fear of losing control

Pessimistic about client potential

Heavy on authority

Goal for client is compliance

Style: inflexible

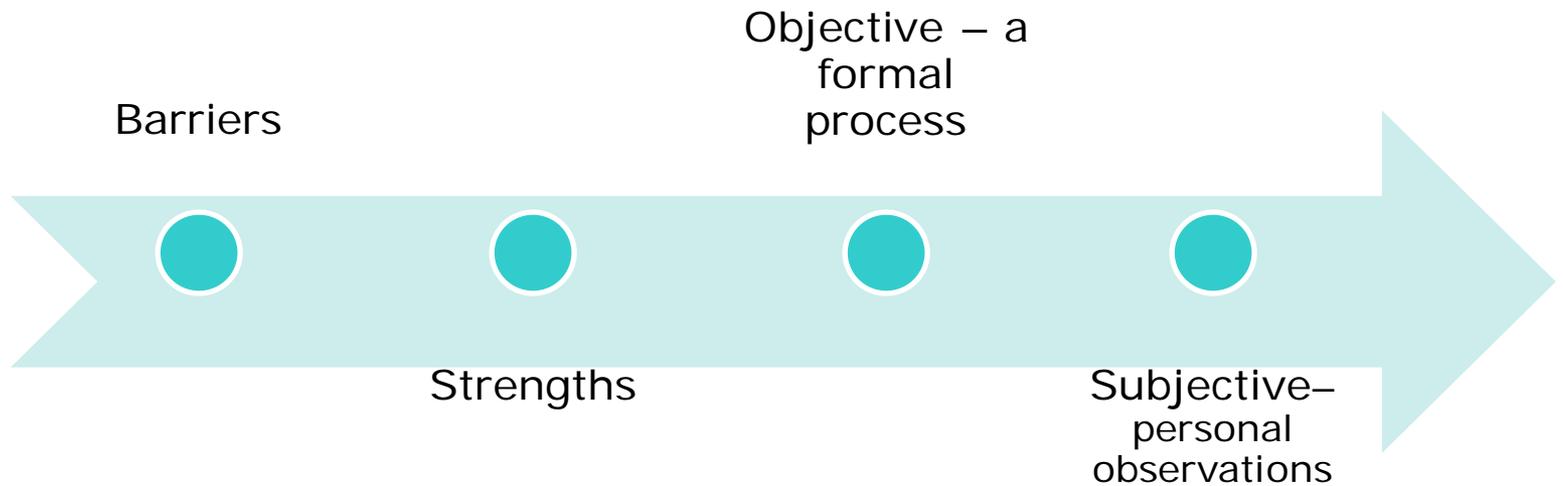
Stage 2: Assessment

An **evaluation** or **estimation** of

an individual or family's

abilities and **potential**

Assessment



Assessment is....



A joint
activity for
the case
manager and
the client to
identify...

Assessment Will Identify...

Extent & nature of
refugee's needs

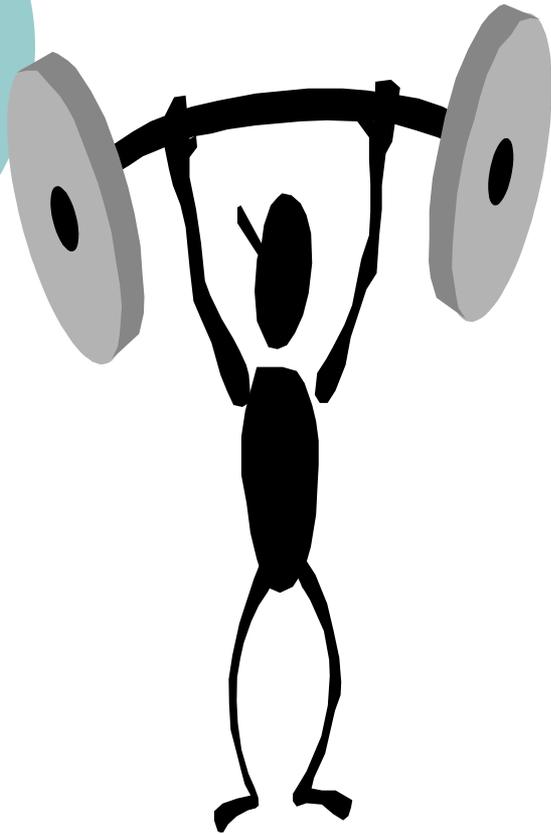
Capacity of
refugee to address
these needs –
their strengths

Capacity of
refugee's support
network to
address needs

Capacity of agency
to meet these
needs

Document needs
and strengths
clearly

A Strength-Based Perspective



What people have learned about themselves, others and their world

Personal qualities, traits and virtues

What people know about the world around them

The talents people have

Cultural and personal stories and lore

Pride and dignity

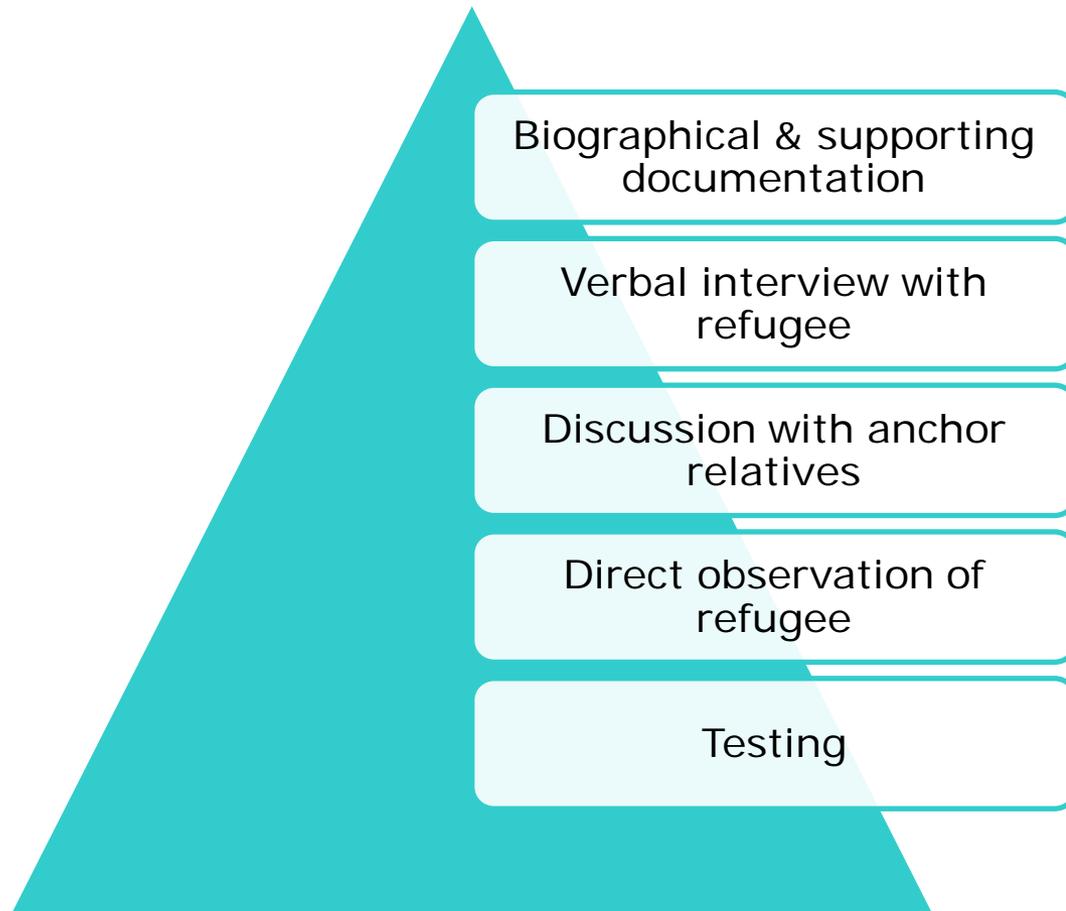
The community

Assessment in the Wilson-Fish Context

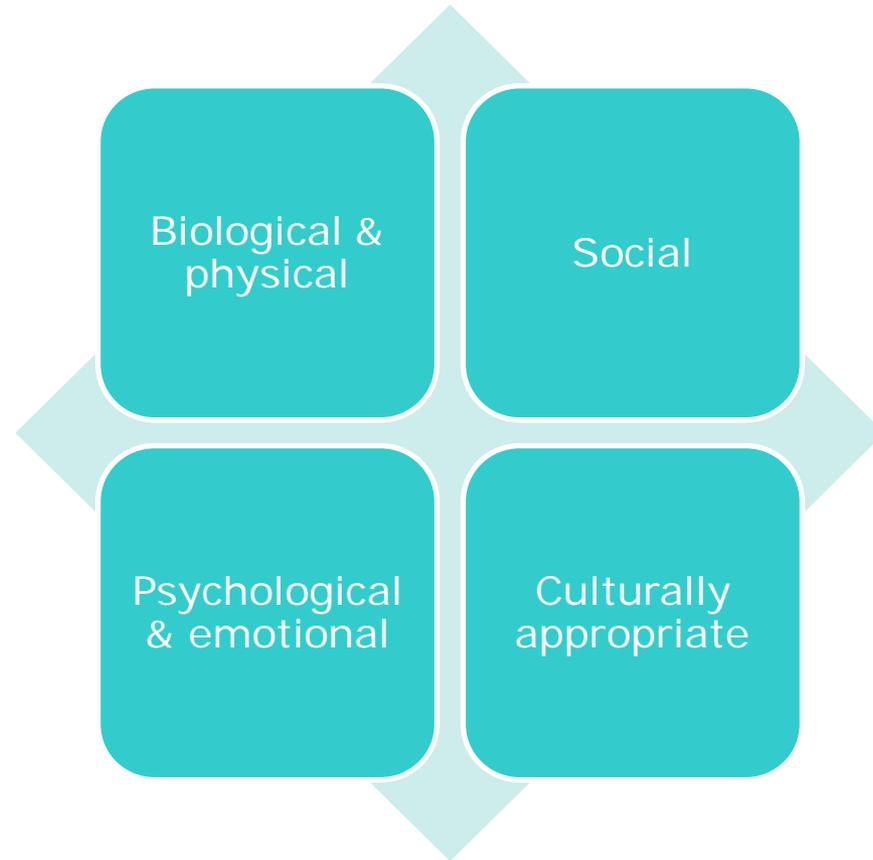
When....Where....How?

- Initial Assessment
 - Assessment forms & documentation
 - FSSP
- On-going assessment
 - Case notes, other documents (e.g. test results, evaluations, etc)

Assessment Determines Needs Using the Following Methods



Assessment Is Holistic & Comprehensive



Assessment is Participatory

Opportunity for refugee to:

- ✓ **articulate** needs
- ✓ **prioritize** needs
- ✓ be **present** and **involved** in planning

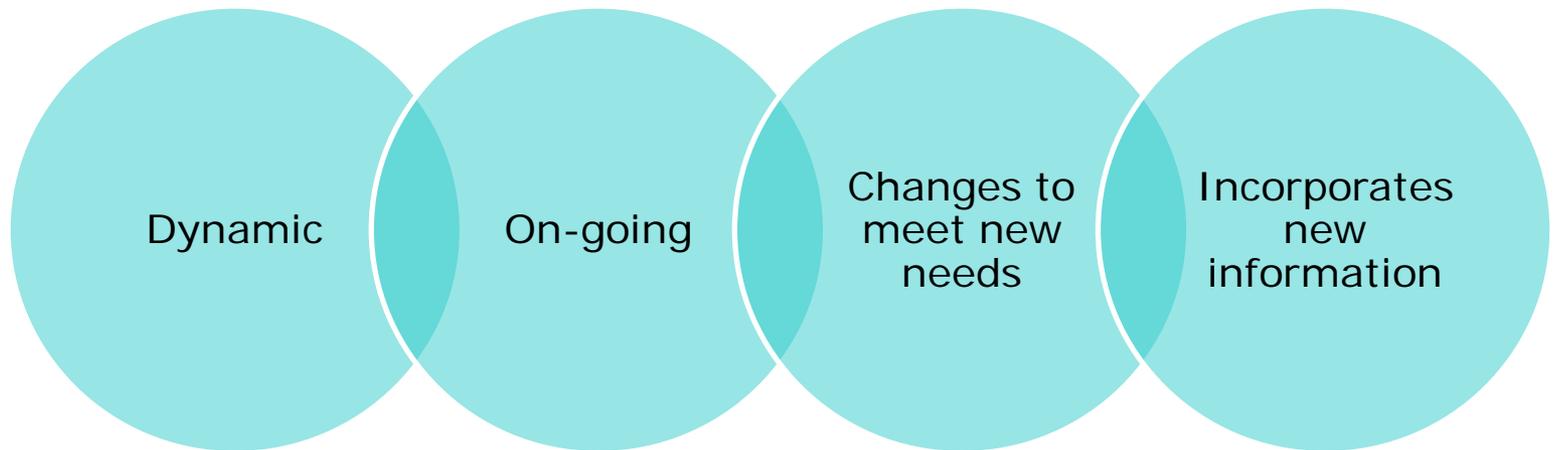
Assessment is Systematic

It is formal

It uses
available
data

It uses
tests and
evaluations

Assessment is a Process



Assessment is a Product

It is a complete set of materials that clearly identifies client needs and barriers to success



Stage 3: Planning & Goal Setting

The planning process:

Explores **full range** of goals

Establishes **specific goals** with the client

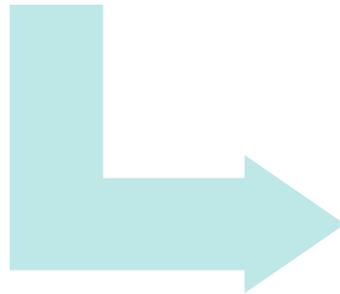
The Skilled Helper Concept

The skilled helper comes alongside a client and assists with:

- Formulating a plan of action
- Accepting responsibility for their own future
- Transferring newly acquired skills and knowledge to fresh situations
- Establishing appropriate and realistic goals
- Becoming self-directive and develop the skills of problem-solving,
- Building their inner strengths and utilizing external resources and support groups

Planning & Goal Setting in the Wilson-Fish Context

The Key Document....



Family Self-Sufficiency Plan

- Enhances client's strengths
- Reduces barriers
- Is in objective terms and time-referenced

The Family Self Sufficiency Plan Outlines a Process...

Details the **steps** and projected **timeframes** to be taken by:

the **client**

the **agency**

other **family members...**

Suggests a Pathway...





...To Reach a Goal

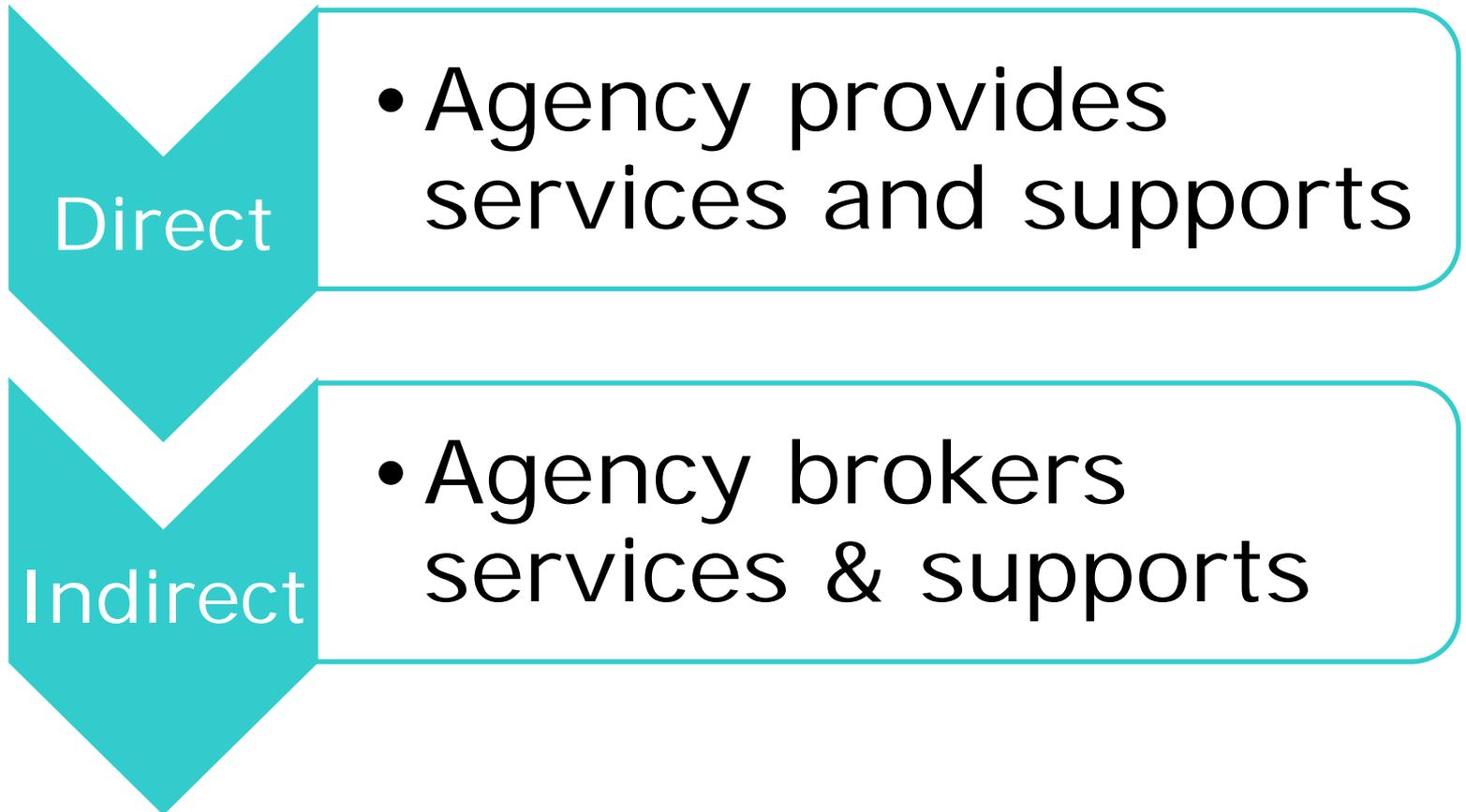
...to work toward the earliest possible
employment and **self-sufficiency**
for the family



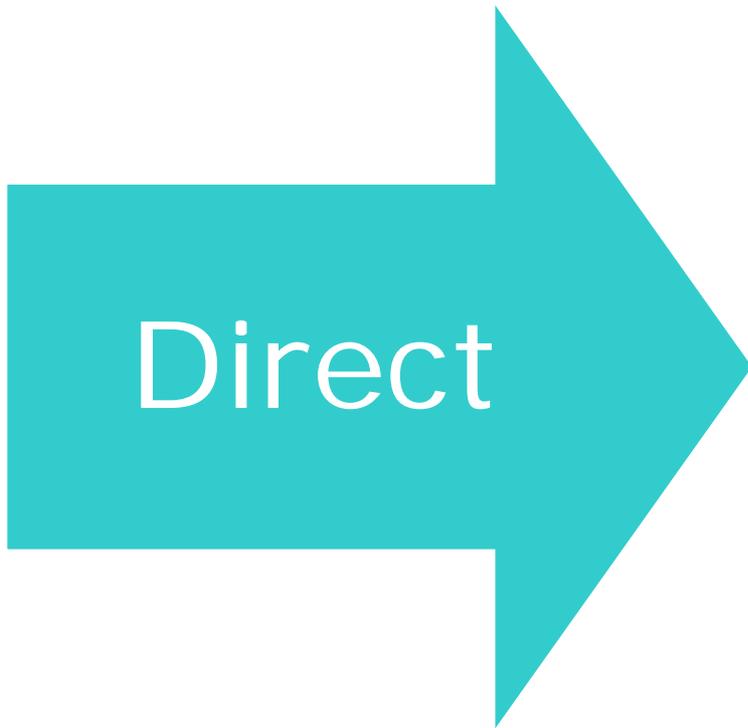
The Key Elements of a Family Self-Sufficiency Plan

- Relates directly to the assessment
- Identifies strategies to remove barriers and build on strengths
- Identifies actors – who does what
- Outlines activities
- Has a timeline
- Lists expected changes and goals
- Family budget for self-sufficiency

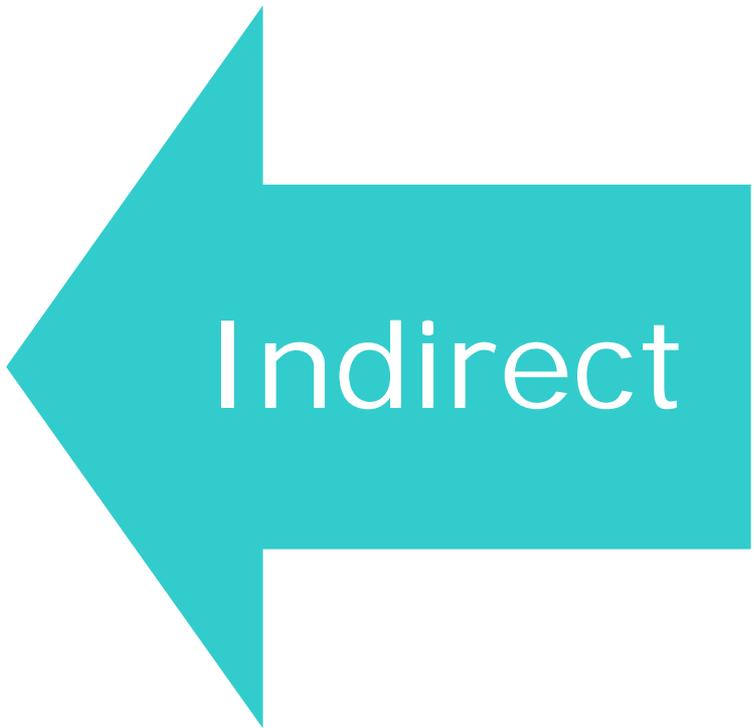
Stage 4: Intervention or “Working the Plan”







Direct



Indirect



Direct Service Functions

1. Implementing plans
2. Teaching and instructing
3. Guiding and collaborating
4. Processing
5. Providing information
6. Supporting



Indirect Service Functions

1. Brokering
2. Linking
3. Advocacy
4. Coordination
5. Social network intervention
6. Technical assistance consultation

Interventions include



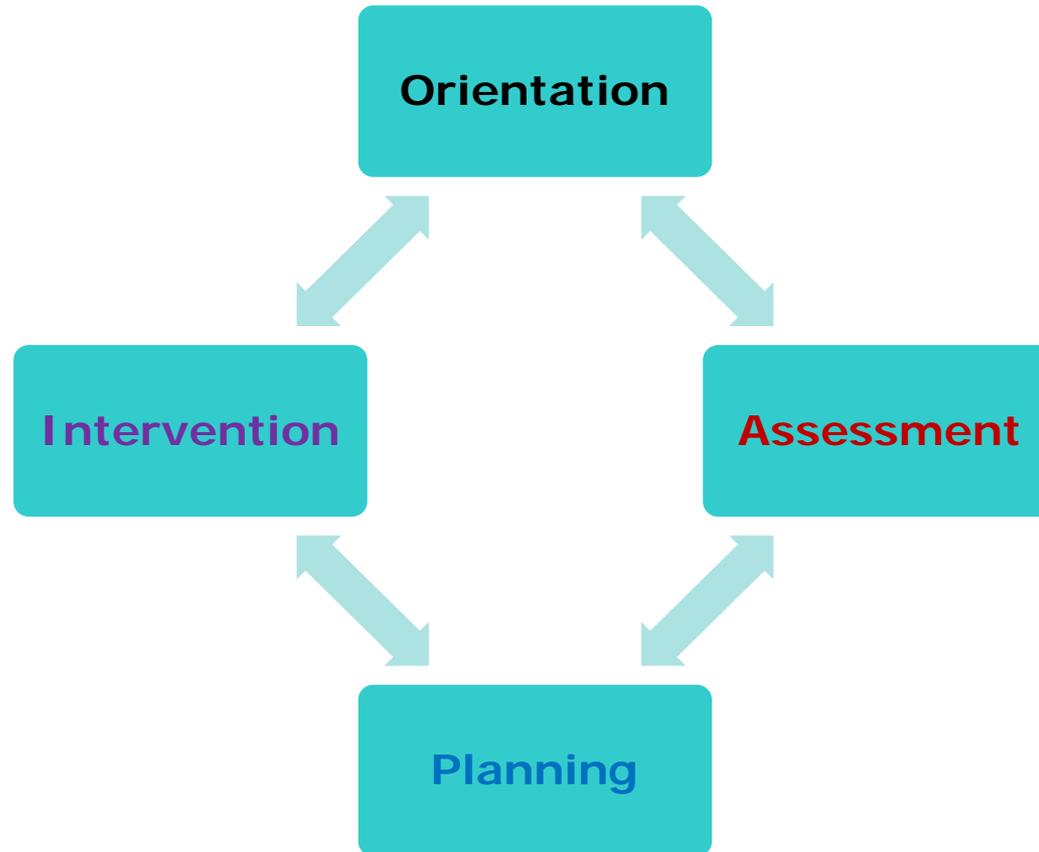
-
1. Orientation to the resettlement process
 2. Training or referrals to training
 - Cultural Orientation/Social Skills
 - ESL
 - Vocational Education
 - Financial Literacy
 - Medical treatment

Interventions are the responses to the FSSP!

They link the assessment (strategies) with the intervention plan:

1. Identified **barriers** should be listed with **interventions** to **overcome** them
2. Identified **strengths** should be listed with **interventions** to **build upon** them

Round Robin of Resettlement



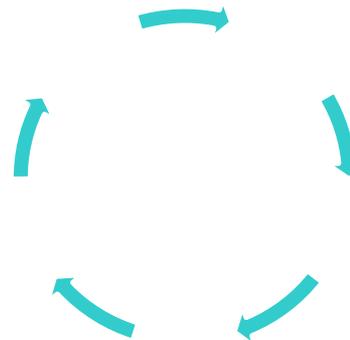
The Story of the Line and the Circle

Presenting **Resettlement** as

○ **The Line:**



○ **The Circle:**



Stage 5: Monitoring & Evaluation

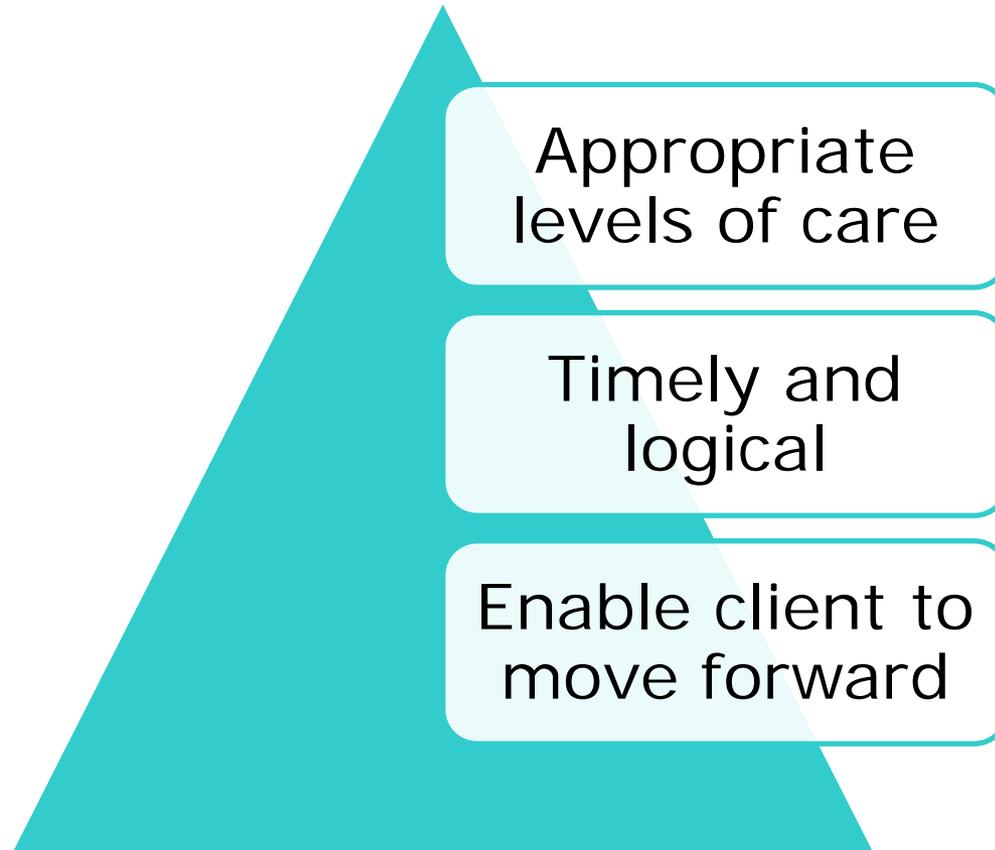
Goal

To assure that **quality services** (the best you can provide)

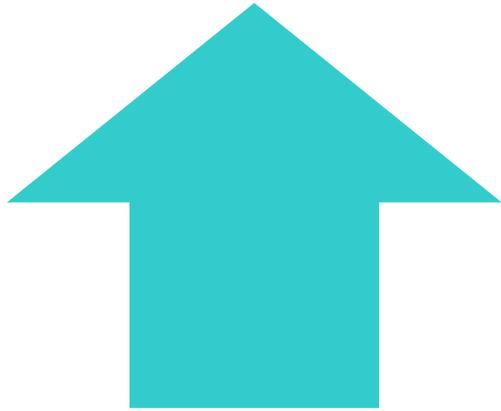
Services

- Are provided at the **appropriate** levels of care for each client
- Are provided in **timely** and logical fashion
- Enable client to **move forward** with their plan

Stage 5: Monitoring & Evaluation



Monitoring may be:

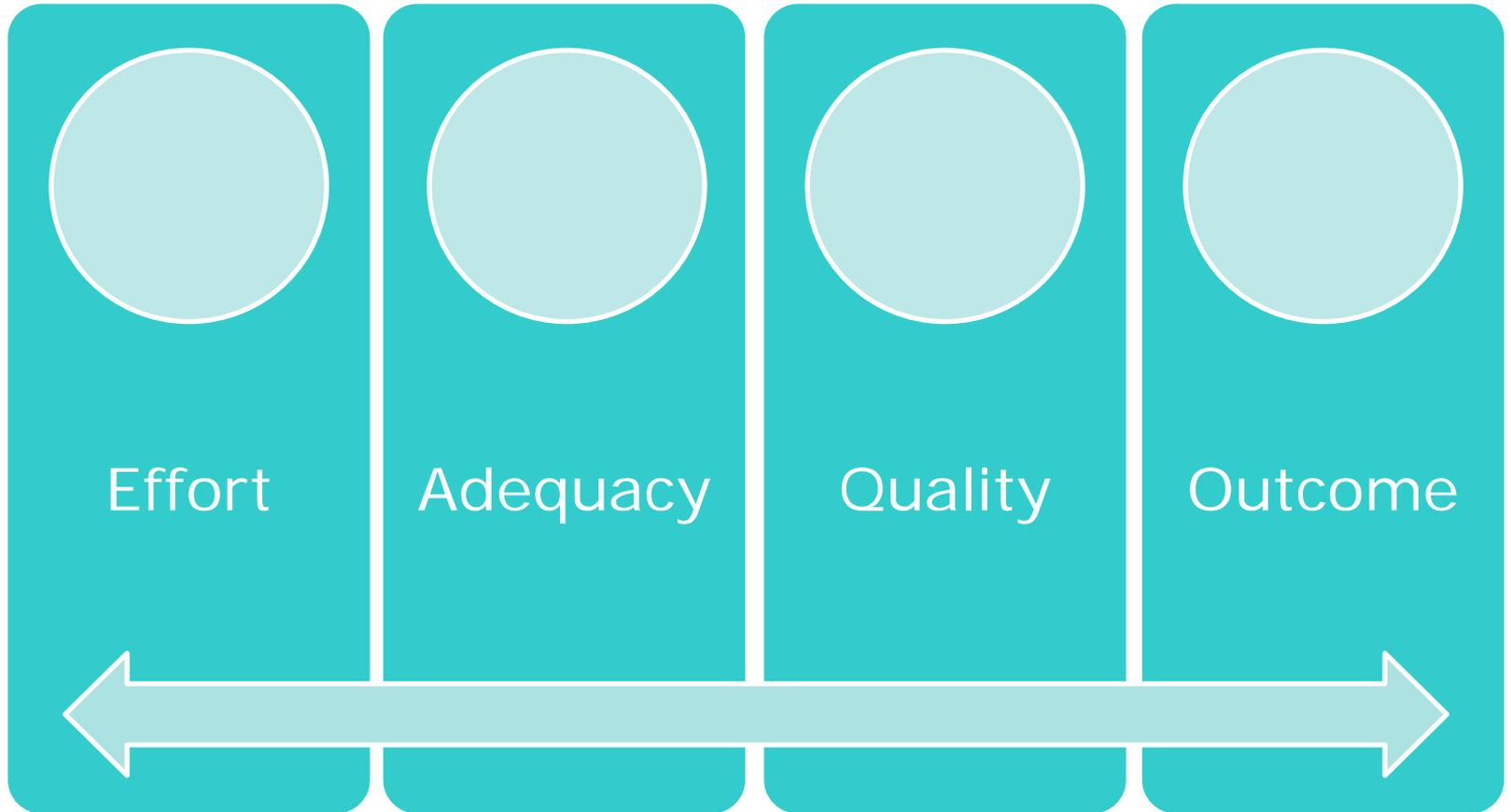


Formal

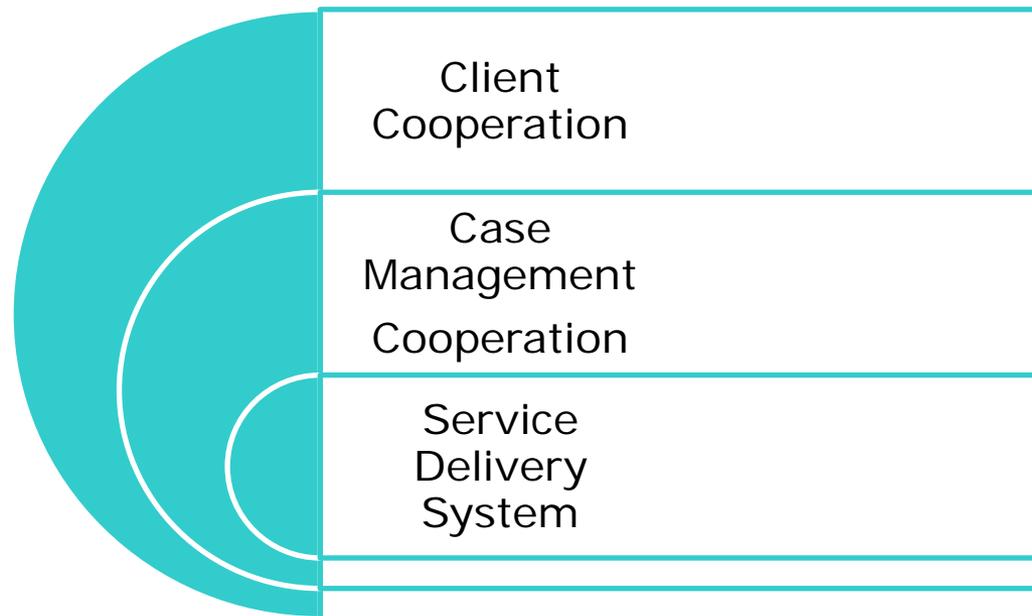


Informal

Monitoring Elements



Monitoring Identifies Issues in the Following Areas



Monitoring:

- Is an on-going process
- Asks “Is the agreed upon plan being carried out as intended?”
- **“Are we working the plan?”**

Evaluation:

- Focuses on whether the entire CM process is achieving expected goals
- You may seek client feedback
- **“Is this the right plan for the client?”**

Monitoring/Evaluation

Are we working the plan?

- monitoring

Is this the right plan?

- evaluation

Stage 6: Case Closure

- ✓ **Exit interview** with the client
- ✓ A **plan** for the next stage as needed

What to give to client:

- ✓ Letter officially **recognizing accomplishments**
- ✓ A list of **ways the agency can continue to serve the client**
- ✓ A list of **community resources and referrals**



*Thank You for the opportunity to share in
your work.*

For more information, please contact:

Peggy Gilbert

Senior Program Advisor, ISED Solutions
peggy.gilbert@isedsolutions.org

Meredith Lee

Senior Researcher, ISED Solutions
meredith.lee@isedsolutions.org