



FALMOUTH INSTITUTE.

Case Management Professional Development System

The Falmouth Institute Case Management system has been designed to address the issues and provide the skills and information needed to assist the professionals working as case managers in Indian Country. Through this innovative program, professionals can learn to understand case management, their roles as case managers in Indian Country and develop the vital skills needed to assist the clients whom they serve.

Within Tribal communities, members of a case management team may come from many different departments or organizations, such as schools, health care facilities, hospitals, employee assistance programs or tribal enterprises. These professionals may also have different goals, objectives and backgrounds, so we have structured this program to address the specific needs of each group. This program is divided into three segments:

Level One: Introduction to Tribal Case Management

Level Two: Tribal Case Management

Level Three: Client Development

Each level is delivered during a one-week on-site (per level) within your facility. You can choose to provide individual levels or the complete program to members of your Case Management team.

No matter where they are when they enter, through this program, case managers can become familiar with the activities and responsibilities of others involved in social work and will be better prepared to offer guidance, assistance and support to those they serve. Like many methods of social work professional development, case management rests on a foundation of training, values, knowledge, theory and skills used in the effort of reaching established goals that will benefit the client and the community.

Goals for the members of your Case Management team may include:

- Enhancing developmental, problem- solving, and coping capacities of clients
- Creating and promoting the effective and humane operation of systems that provide resources and services to people

- Linking people with systems that provide them with resources, services and opportunities
- Improving the scope and capacity of the delivery system
- Contributing to the development and improvement of social policy

Level One: Introduction to Tribal Case Management

Cultural Competency and Case Management

Segment Objectives:

- Identify American Indian cultural values, practices and traditions of the Indian family
- Use the identified American Indian cultural values, practices and traditions and incorporate into case management practices and enhance the success of program clients

This segment examines the cultural strengths inherent in Indian cultures and examines how the caseworker can effectively deal with cultural differences and integrate the strengths into the case planning process.

Focus to include:

- American Indian communicating and parenting
- American Indian values related to the worlds of family, work and career
- The differences between urban Indian cultures and reservation Indian cultures
- Indian cultural values, traditions and practices as they affect daily living and case planning

Case Management and Historical Trauma on American Indian Families

Segment Objectives:

- Caseworker will identify and understand the effects of historic trauma on Indian families
- Assess the risk factors and case planning to overcome behavioral issues
- Utilize community resources to assist the client to ameliorate trauma

This segment will provide knowledge regarding historical trauma and the underlying research and theory. We will focus on how historical trauma may impact the motivation, functioning and capability of clients to involve themselves in the development and participation in a case plan.

Focus to include:

- Helping to foster a safer environment for healing

- Encouragement and empowerment of the clients through giving options and choices
- Understanding and dealing with trauma in the lives of clients
- Identify and utilizing community resources

Effective Interviewing For Case Planning

Segment Objectives:

- The caseworker will learn the theoretical foundation and skills needed to effectively interview program clients, resulting in the development of individual case plans that lead to self-sufficiency
- Staff will learn the knowledge and skills necessary to effectively establish professional boundaries when working with program clients
- Practice interview techniques

This segment covers strategies and steps to conduct interviews and core assessment of American Indian clients. It takes into account the requirements of the assignment and the families' values, traditions and needs with regard to giving and receiving information, as well as building working relationships. This segment will identify and make use of client strengths and identify potential barriers to self-sufficiency. The segment will also assist the caseworker to focus on all aspects of the interview and assessment of the families' needs.

Focus to include:

- Establishing effective relationship with clients
- Vital elements of the interview process
- Strength and resource assessment
- Assessment of risk factors, including domestic abuse, housing, substance abuse, criminal behavior and mental health issues
- Awareness of personal values, biases and beliefs

As a result of this segment, caseworkers will gain skills to conduct interviews that result in a thorough assessment of client resources, risk factors and strengths. In addition, participants will be able to use family and cultural knowledge of the individual American Indian family to make case planning culturally sensitive and establish appropriate interventions.

Accurate and Informed Client Assessment

Segment Objective:

- Provide staff with knowledge and skills required to conduct effective assessments that are based on program goals and services

- Provide staff with familiarity and skills on career, psycho-social, health, basic skills and career readiness instruments for assessment. Include those instruments or skills to measure employment retention rate, earnings change, credential and diploma attainment rate, and skill attainment rate
- Provide staff with knowledge and skills to use assessment data in the development of case management plans

This segment builds skills to utilize culturally based strengths to develop, implement and monitor effective case plans and advocate for resources that help American Indian clients achieve self-sufficiency.

Focus to include:

- Helping clients define goals for employment and services
- Developing and modifying the case plan
- Reducing resistance
- Making effective referrals
- Collaborative case management: moving from coordination to collaboration
- Casework with empathy
- Helping clients define goals for employment and services
- Making effective referrals

Level Two: Tribal Case Management

Technical and Organizational Skills for Case Management

Segment Objectives:

This course covers techniques case managers can use to organize their work to meet the many demands of the job. It also addresses technical aspects of case management in a human services setting related to helping Native Alaskan clients achieve self-sufficiency and access resources.

Focus to include:

- Organizing and prioritizing work
- Time management
- Case documentation and narrative
- The job search process and resume writing
- Community resource lists
- Stress Management

As a result of this course, participants will develop skills for taking an organized approach to their work and their assistance to clients.

Case Documentation

Segment Objective:

- Review the critical elements effective and technically accurate case notes, and other documentation and reporting requirements
- Multi-purpose documentation meets the requirements for case plans and additionally meets the requirements of the program
- Writing objective case plan notes that report on the progress of the case
- Utilize the program's case management technology to manage case records and the tracking of client progress

Case noting is an important part of case management and is a valuable skill. This workshop covers fundamental writing concepts and skills, as well as techniques for collecting, documenting and storing information in a manner that meets the requirements of the program and regulations. We will focus on writing accurate, succinct and precise case notes.

Focus to include:

- Grammar, spelling, punctuation and capitalization
- Matching goals and tasks of the case plan with activities
- Valuable elements of documentation
- Case record as a legal document
- Documentation and keeping records
- Recording service delivery efforts
- Reviewing case plan activities

Developing an Effective Case Plan

Segment Objective:

Managers, staff and supervisors will understand and develop an effective case plan that assists the client to move to self-sufficiency.

- Development of client goals and activities
- Use of strengths-based, solution based methodology

Building upon the assessment of client needs and functioning, we will explore the development of a tangible plan that spells out specific goals, objectives and activities with the support and direction of the case manager. Information gathered from a thorough assessment of client resources, assets and needs will be used to develop a case plan for self-sufficiency based on a strengths-based, solution focused approach. We

will discuss the use of formal and informal assessment tools, understanding of the outcome of assessments and the development of goals and tasks that are based on client needs.

Focus to include:

- Formal and informal assessment strategies
- How to take assessment results into goals and activities
- Monitoring and evaluation of case plan effectiveness
- Strength based case management

Caseload Management

Segment Objectives:

- Provide case managers with knowledge and skills to effectively follow through with cases according to files, notes and plans
- Provide case managers with the knowledge and skills to effectively manage and organize a caseload
- Resource and referral follow up

This segment follows up on the case planning process by continuing to focus on case implementation through a strength-based, solution-focused perspective developed in case planning. It addresses the use of strength-based follow up, skills and assessments in case monitoring, providing accountability, identifying additional barriers and case plan modification.

Focus to include:

- Ongoing engagement of the families in the case planning process
- Modifying plans that are family-friendly
- Practicing follow up interviewing skills that facilitate strength-based planning
- Using assessed strengths to develop informed, achievable objectives and activities
- Developing strengths into the development of services

Participants will use and apply strengths-based practice to the development of workable case plans for the benefit of families.

Level Three: Client Development

Client Coaching Skills

Segment Objective:

Provide case managers, family preservation and other identified staff with technical assistance and coaching skills to support client self-sufficiency and youth participant development.

The caseworker is a helper. This segment focuses on the interpersonal skills staff can use to motivate and support clients. The segment addresses ways to handle difficult situations that can arise in the case planning and implementation.

Focus to include:

- Employing the client in the change process
- Motivating clients to support change
- Overcoming difficult client behavior
- Crises prevention and intervention
- Focusing on the issue, situation or behavior and not the person
- Using cultural approaches to motivation
- Assisting clients in job searches, resume development and interviewing

Client Personal/Professional Skill Building

Segment Objectives:

- Staff will acquire strategies for motivating and empowering clients to self-sufficiency
- Provide staff with opportunities to develop insight and understanding of special client concerns and barriers
- Provide staff with skills and techniques to identify and address special client concerns and issues through direct client training and coaching
- Provide staff with skills and knowledge supporting the healthy development of youth and their families

Focus to include:

- The keys to self-sufficiency
- From changing habits to changing perceptions through a variety of practices, strategies and interactions
- Use coaching practices and motivational techniques
- Effective use of resource and referral networks

Assessing Employment Skills for the Tribal Client

Course Objectives:

- The case manager will be able to effectively identify participant barriers to employment within overall self-sufficiency plans (mental health, chemical dependency, housing, language and culture, health and disability, motivation, self-esteem, etc.)
- Identify skills, education and employment that will foster the participant's success

This course covers appraisal, assessment, assessment tools and practices for articulating effective work participation plans. Case managers will understand how to use assessment to move clients from assistance to self-sufficiency.

Topics include:

- Fundamentals of appraisal and assessment
- How to use testing, interpretation and evaluation
- How to link assessment to a welfare to work plan
- Advancing the assessment to reduce time between referral and activity
- Increasing communication and understanding between participant and case manager

Employment Services Skills

Course Objectives:

- To increase unsubsidized employment for clients
- To increase retention of employment for participants through skill building and support
- To increase earnings received in unsubsidized employment
- To enhance career and employment opportunities for low income families

This course will assist the case manager in proactively working with private businesses and public agencies to identify training and development needs on an individual, group and organization-wide basis for clients; coordinate the development of education, employment and training plans and curriculum for participants; assist with the integration of client educational plans, career plans and community resources by coordinating with community partners; assist clients in developing employment plans, work opportunities, applications, resumes and other employment and skill building activities.

Topics include:

- Accountability and job search techniques
- Determining employability through labor market information
- Review of labor laws
- Creating constructive activities that lead to self-sufficiency

- Determining which services best help families obtain/maintain employment
- Basic skill development programs
- Monitoring client employment plans and outcomes
- Increasing participation rates, life skill and work ethic building
- Job search skills
- Labor market information
- Employment goal setting
- Resume writing
- Job retention skills



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