



# The Accountable Case Manager Training Agenda

Presented by Frederick Richmond  
The Center for Applied Management Practices

## Day One – The Accountable Case Manager – Theory and Practice

Registration and Introductions – 8:30AM-9:00AM

Chapter One: A Definition of Self-Sufficiency for Community Action  
Exercise One: Direct Services vs. Case Management

Chapter Two: Overview of Case Management in Community Action  
Exercise Two: Agency Resources for a Case Management System

Chapter Three: Intake for Case Management or Direct Services  
Exercise Three: Intake Functions, Resources, Issues, Content, and Skills

### Lunch – 12:00PM (on your own)

Chapter Four: Pre-Assessment for Case Management or Direct Services

Chapter Five: Comprehensive Assessment for Case Management or Direct Services

Chapter Six: Comprehensive Assessment and Accountability for Case Management or Direct Services—Using an Outcome Scale or Outcome Matrix  
Exercise Four: Analysis of the Family Outcome Matrix

Chapter Seven: Case Management Planning

Chapter Eight: Case Scenario, Case Management Exercises  
Exercise Five: Write a Case Plan

Chapter Nine: Developing Discharge Criteria and Closing the Case

Day One Wrap-up and Preview of Day Two – 3:45-4:00PM

## Day Two – The Helping Interview – Practice and Role Play

- Exercise 1-How NOT to Listen
- Exercise 2-Change
- Exercise 3-Ring Tone
- Exercise 4-Non Verbal Listening
- Exercise 5-Thinking Reflectively
- Exercise 6-Summarizing
- Exercise 7-Skills Role Play/Evaluation

