

The Accountable Case Manager Group Exercises

Exercise 1

Exercise 2

Exercise 3

Exercise 4

Exercise 5

EXERCISE ONE

Exercise One: Instructions

This first exercise is an attempt to elicit from the class what they know, or what they believe, about delivery of services aimed at persons in poverty and promoting self-sufficiency of such persons.

The exercise assumes that there are two extremes in connection with service delivery: Direct Services vs. Case Management. In reality there are probably gradations between these, and overlap of these. For the sake of this exercise, however, assume that the choice is between doing Direct Services Only, and doing service delivery WITH or VIA Case Management.

The class is divided into four groups. Each group directs their focus on a particular question pertaining to the two modes of service delivery:

- A. What are the advantages of a Direct Service only approach to serve persons in poverty or promoting self-sufficiency?
- B. What are the disadvantages of a Direct Service only approach to serve persons in poverty or promoting self-sufficiency?
- C. What are advantages of utilizing Case Management to serve persons in poverty or promoting self-sufficiency?
- D. What are disadvantages of utilizing Case Management to serve persons in poverty or promoting self-sufficiency?

Record your findings as a list of items on a flip chart to present to the rest of the class. Members of the class from other groups will have an opportunity to question items on your list, so be prepared to explain what you consider to be an advantage, or a disadvantage.

You will also have an opportunity to re-examine what other groups are presenting.

Exercise One – Direct Services vs. Case Management

Advantages of Direct Services Only	Disadvantages of Direct Services Only
Group A	Group B

Exercise One – Direct Services vs. Case Management

Advantages of Case Management	Disadvantages of Case Management
Group C	Group D

EXERCISE TWO

Exercise Two: Instructions

Imagine that you are part of a “blue ribbon” committee tasked with conducting a feasibility study for implementing a case management system in a CAA. The CAA has multiple funding sources and programs as well as satellite offices to cover a multi-county service area.

The feasibility study must determine what resources are required to sustain a successful case management system. The task is broken down into four categories of resources: (A) Policy and Procedures needed, (B) Physical Resources needed, (C) Community Relationships needed, and (D) Human Resources/Skills needed. Your “blue ribbon” committee has assigned a task force to each of these resource categories and you are a member of one of them (Group A, B, C, or D). You should focus on your particular resource category. Later, you will have an opportunity to comment and review the other resource categories.

Your group (task force) should make a list of resource items deemed necessary to support a successful case management system. Record the list on a flip chart to present to the rest of the class. If you need to qualify items on your list, feel free to do so. The other members of the class will have an opportunity to question items on your list, so be prepared to explain why your resource items are important for case management.

In order to carry out this assignment, you have to imagine or mentally simulate a case management system in operation (that is the point of the exercise). Further, you have to discuss, explain, share, and form a consensus about your imaginary case management system with other members of your group. Defining the resources needed (and qualifying them as necessary) is further step in articulating an understanding of what is involved in a case management system.

Exercise Two – Agency Resources for a Case Management System

Policy and Procedures	Physical Resources (including financial)
Group A	Group B

Exercise Two – Agency Resources for a Case Management System

Relationships with Community Entities	Human Resources and Skills
Group C	Group D

EXERCISE THREE

Exercise 3 (Intake Functions, Resources, Issues, Content, and Skills)

In order to operationalize an effective intake process, there are a number of issues to be aware of, resources that should be deployed, content matters to be determined, and skills applied in specific ways. This exercise examines these matters through four assignments outlined below.

Each assignment asks for the group to develop a list.

- A. What can go wrong in an intake procedure?
- B. What considerations might an agency use to determine what information to collect at intake?
- C. What resources, supports, and arrangements are necessary for operating a common or central intake function?
- D. Write a help wanted ad for an intake position, including skills requirements and duties.

Divide the class into four groups and give each an assignment A – D (use Exercise 3 handouts when giving assignments). Give each group flip chart paper and markers to record their work for presenting to the class. Allow 5 to 10 minutes to work on task.

Ask each group to present their assignment and findings to the rest of the class. After all groups have presented their report, review each assignment again by inviting comment and additional input from the rest of the class.

Finally, look for useful relationships among the four assignments. Are there items in part C or part D that might mitigate issues in part A? Are there any items in part B that might contribute to issues in part A? If part C includes computer technology resources, is this reflected in part D (job description)?

Exercise 3 (Intake Functions, Resources, Issues, Content, and Skills)

What can go wrong in an Intake?	What information should be collected at Intake?
Group A	Group B

Exercise 3 (Intake Functions, Resources, Issues, Content, and Skills)

What resources, supports, and arrangements are necessary for operating a common or central intake function?	Write a help wanted ad for an intake position, including skills requirements and duties.
Group C	Group D

EXERCISE FOUR

Exercise Four

Analysis of the Family Outcome Matrix

Notes to Trainer:

Exercise Four is used to introduce the practice of analysis to support client management, and improve the decision making of both the case manager and the client. The exercise demonstrates that the analysis and interpretation of outcome data produces useful information to support decision making and can be used to measure well-being and performance.

Instructions:

Each group should have their own easel or be given flipchart paper and marker pens. Each group should identify a recorder/scribe and a presenter. Have each group brainstorm a list of items according to their assignment. Give the class no longer than 10 minutes to work on their assignment.

Organize the class into four groups. Prior to the training day, prepare an index card for each group using the exact language below. When administering the exercise, give a card to each group and issue the assignment as follows:

Group A: Income

Group B: Employment

Group C: Housing and Education

Group D: Transportation and Childcare

Have each group review the Outcome Matrix in the assigned domain. Tell them:

- To identify the changes that have occurred in the specific domain(s) over the three time periods identified in the Outcome Matrix: July 3, August 17 and November 9 and write it down on their easel sheet.

This is the first level of analysis, to accurately describe what happened.

- To identify changes across domains that may have affected or resulted in an improvement of well-being and write it down on their easel sheet. You are looking for associations and relationships.

This is the second level of analysis, to understand the relationships interventions and their resulting outcomes. You are not looking for a statistical correlation or causality but a common sense association.

- The trainer should circulate among the groups to stimulate thinking if a group gets “stuck” or seems to be missing important factors.
- Post the list from each group on the wall. If there is no easily accessed wall space, either have a person hold their list or post it on the trainer’s easel in the front of the room. Have each group’s presenter report their findings to the class. Report assignments A through D in the same order as listed above which follows the presentation (from left to right) on the Outcome Matrix.
- As each group reports their findings, it is possible that someone from another group has a thought to add to the list. If this happens, say: “We’ll come back to that, let’s get through all the lists first.” This allows for each group’s work to stand unmolested for at least a little while.
- After each group has reported out on their respective domain(s), this is the first level of analysis, open the discussion to the second level of analysis which is to identify changes across domains that may have affected or resulted in an improvement of well-being. Do this as an entire class. Encourage group discussion. You do not need to write down their answers.

After you have completed the group discussion, go back to the PowerPoint presentation and review the “official” answers from the book. You will already have covered most of the answers from the individual group presentations.

Exercise Four: Analysis of the Family Outcome Matrix

1 st Level	Domain: _____				
Identify Changes in this Domain occurring over the three time periods.	<p style="text-align: center;">Baseline 7//06:</p> <p style="text-align: center;">Re-assessment 8/17/06:</p> <p style="text-align: center;">Re-assessment 11/9/06:</p>				
2 nd Level	Income	Employment	Education	Transportation	Childcare
Identify changes across Domains that might have affected or improved well-being.					

<p>1st Level</p> <p>Identify Changes in this Domain occurring over the three time periods.</p>	<p>Domain: _____</p>				
<p>2nd Level</p>	<p>Income</p>	<p>Employment</p>	<p>Education</p>	<p>Transportation</p>	<p>Childcare</p>
<p>Identify changes across Domains that might have affected or improved well-being.</p>	<pre> graph TD A[Income at 300% of Poverty] --> B[Hired as Welder] A --> C[Purchased a car] B --> D[Finished Vo-Tech] D --> E[Vouchers for metro bus] E --> F[After school Program] F --> C </pre>				

EXERCISE FIVE

Administer Exercise Five

Write a Case Plan Identifying: Strengths and Needs, A Plan of Action, Implementation and Follow-up, and Goals and Objectives

Notes to Trainer:

The entire Chapter Eight is a hands on exercise where participants analyze a hypothetical case and prepare a case plan. Preparation of the case plan has three exercises:

Part One – Strengths and Needs

- What are her strengths?
- What are her primary needs?
- What are her secondary needs

Part Two – Plan of Action, Implementation and Followup

- What would be a possible plan of action?
- How would you implement the plan?
- What type of follow-up would you conduct?

Part Three – Goals and Objectives

- Write goals and objectives for Jane. Explain how you would demonstrate that she is moving from dependency towards independence.

Instructions:

Each group should have their own easel or be given flipchart paper and marker pens. Each group should identify a recorder/scribe and a presenter.

- Organize the class into four groups: Group A, Group B, Group C, Group D.
- Have the class go to page 109 of their text while you are showing slides 8-2-109 and 8-3-109 on your PowerPoint. Read out loud or have a participant read each of the two paragraphs of the case scenario to the class.