

Case Management 101

GCAA Annual Conference
Hyatt Riverfront Hotel Savannah
Georgia

Shaping the Future... One Family
at a Time

July 20, 2016

Empowering individuals and families toward self-sufficiency producing outcomes to improve their lives and foster independence.



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CORE SKILLS FOR FAMILY DEVELOPMENT SPECIALIST CERTIFICATION TRAINING

Overall Course Objectives:

- 1) ability to support and empower families through skillfully building a collaborative relationship,
- 2) ability to help families identify their goals and barriers and develop a plan to achieve their goals,
- 3) awareness and intervention strategies for dealing with challenging family issues-psychological, emotional and interpersonal,
- 4) skillful application of core coping skills for families within systemic understanding of families and their context,
- 5) ability to identify strengths, develop a plan and coordinate a network of resources in partnership with families to help them achieve their goals, including skillful application of family assessment tools (eco-map, geno-gram, timeline, matrix, balance wheel),
- 6) ability to advocate for families within communities through application of community organizational and group facilitation skills,
- 7) ability to access appropriate sources of professional growth, utilize self-awareness skills and ongoing self-care resources while providing Family Development services.

SHIFTING TO A FAMILY DEVELOPMENT PARADIGM

<i>From</i>	<i>To</i>
Short-term Thinking.	Long-term Thinking.
Emphasis on Crisis Intervention.	Emphasis on Crisis Prevention.
Seeing Deficits.	Seeing Strengths.
Ignoring/Devaluing Difference.	Recognizing/Affirming Difference.
Low client expectation.	High client expectation.
Disadvantaged have different aspirations than more advantaged.	Aspirations are similar; access to resources differ.
Professionals know better than parents or lazy people.	People have different kinds of knowledge.
Reliance on experts.	Reliance on the “common-wealth” of communities.
Bureaucratic norms and goals.	Consumer norms and goals.
“WE” choose for “THEM”.	Consumers choose for themselves.
Power over.	Power with and among.
My views are better.	My views are different.

PARALLEL SHIFTS IN PARTICIPANT SELF VIEW

<i>FROM</i>	<i>TO</i>
Feeling hopeless	Feeling hopeful
Self-doubt	Belief in self
Self-blame	Promoting the possible
“They owe me”, blaming others.	“I am responsible for my future”, taking control of my own life.

THE FAMILY DEVELOPMENT PROCESS

JOINING

Through regular personal visits in family homes or other safe meeting places, the Family Development Specialist joins in a long-term partnership with each family member. This partnership is based on:

- ✓ TRUST
- ✓ RESPECT
- ✓ RESPONSIBILITY
- ✓ INTEGRITY

ASSESSMENT

By approaching a variety of assessment tools, the Family Development Specialist meets with each family to identify:

- ✓ FAMILY STRENGTHS
- ✓ FAMILY PATTERNS AND TRENDS
- ✓ FAMILY VISION FOR THEIR FUTURE
- ✓ BARRIERS TO REACHING THEIR VISION
- ✓ FAMILY RESOURCES TO SUPPORT THEIR VISION

PLANNING

The Family Development Specialist supports the family to actively move toward the family's vision of self-sufficiency through the setting and achieving of short-term and long-term goals that are:

- ✓ FAMILY DRIVEN (developed by the family)
- ✓ REALISTIC
- ✓ ACHIEVABLE (revising to insure success experience)
- ✓ SYSTEMATIC (moving towards family vision)

SUPPORT

Ongoing emotional support is the core empowerment technique made possible by the Family Development Specialist, family and community partnership. The results of this support are witnessed in:

- ✓ FAMILY EMPOWERMENT
- ✓ FAMILY HEALING
- ✓ FAMILY COMMITMENT
- ✓ FAMILY VISION ATTAINMENT
- ✓ FAMILY SELF-SUFFICIENCY

LINKING

Throughout the process, each family is linked to the wider community to access:

- ✓ BASIC LIVING RESOURCES
- ✓ PHYSICAL AND EMOTIONAL HEALTH RESOURCES
- ✓ SOCIALIZATION OPPORTUNITIES (assist to break isolation patterns)
- ✓ NEW FAMILY SUPPORT SYSTEMS

Risk Matrix

	Housing/Shelter	Food/Nutrition/ Clothing	Mental/Soc/Em ot Health	Employment
Thriving	<ul style="list-style-type: none"> ▪ Able to own or live in long term affordable housing ▪ Safe and appropriate housing ▪ Chosen to suit preferences 	<ul style="list-style-type: none"> ▪ Always able to furnish ▪ Regular and balanced food ▪ Variety and high quality foods ▪ Clean and durable clothes 	<ul style="list-style-type: none"> ▪ No problems ▪ Able to choose and pay for mental health services ▪ Wellness behaviors 	<ul style="list-style-type: none"> ▪ Permanent and stable employment ▪ Full benefits ▪ Sustaining employment ▪ Constant new skill development; transferable skills
Self-Sufficient	<ul style="list-style-type: none"> ▪ Safe and secure ▪ Dwelling for at least 12 months ▪ Ability to pay 	<ul style="list-style-type: none"> ▪ Always has resources for healthy food and appropriate clothing ▪ Dietary requirements for special conditions (i.e.; pregnancy, diabetes, asthma etc. met) 	<ul style="list-style-type: none"> ▪ Access ▪ Has health insurance ▪ Resources for mental health care of choice ▪ Timely treatment 	<ul style="list-style-type: none"> ▪ Full-Time or adequate employment ▪ Meets basic needs ▪ Benefits ▪ Market relevant skills
Stable	<ul style="list-style-type: none"> ▪ Semi-permanent ▪ Relatively safe & secure housing ▪ Mostly has ability to pay 	<ul style="list-style-type: none"> ▪ Sufficient personal and community resources for food and clothing 	<ul style="list-style-type: none"> ▪ Adequate access ▪ Adequate insurance ▪ Resources for mental health care 	<ul style="list-style-type: none"> ▪ Under-employed ▪ Inadequate pay and benefits
Vulnerable	<ul style="list-style-type: none"> ▪ Temporary or transitional housing ▪ Rent uncertain ▪ Unsafe or crowded 	<ul style="list-style-type: none"> ▪ Limited knowledge of food, food preparation and clothing resources ▪ Recommended Daily Allowances not met 	<ul style="list-style-type: none"> ▪ Limited access ▪ Limited insurance ▪ Limited resources for mental health care 	<ul style="list-style-type: none"> ▪ Temporary or part-time ▪ No benefits ▪ Limited skills
In-Crisis	<ul style="list-style-type: none"> ▪ Homeless or on verge ▪ No income for housing ▪ Dangerous or bad situation 	<ul style="list-style-type: none"> ▪ No food and preparation ▪ Clothing inadequate ▪ Malnutrition ▪ Eating Disorders 	<ul style="list-style-type: none"> ▪ No access; providers not available ▪ No insurance 	<ul style="list-style-type: none"> ▪ Unemployed ▪ No prospects or skills ▪ Chronic or long-term unemployment

Housing/Shelter

- 5 - Thriving: able to own or in long term/affordable/safe/appropriate housing
- 4 - Self Sufficient: safe & secure dwelling for at least 12 months, ability to pay
- 3 - Stable: in semi-permanent / relatively safe & secure housing, mostly ability to pay
- 2 - Vulnerable: temp or transitional housing, rent uncertain, unsafe or crowded
- 1 - In-Crisis: homeless or on verge, no income for housing, dangerous/bad situation

Transportation

- 5 - Thriving: consistent/dependable transport, license, safe/reliable car & insurance
- 4 - Self Sufficient: dependable trans, basic car insurance/license or choose public tran
- 3 - Stable: access to trans when needed, safe
- 2 - Vulnerable: limited access, possibly unsafe, driving without license, reg, ins
- 1 - In-Crisis: no access to transportation to satisfy basic needs

Food/Nutrition/Clothing

- 5 - Thriving: always able to furnish regular & balanced food, clean & durable clothes
- 4 - Self Sufficient: always has resources for healthy food and appropriate clothing
- 3 - Stable: sufficient personal & community resources for food and clothing
- 2 - Vulnerable: limited knowledge of food, food preparation & clothing resources
- 1 - In-Crisis: no food and preparation, clothing or seriously inadequate

Income/Budget

- 5 - Thriving: sufficient/stable income, regular savings, some non-essential purchases
- 4 - Self Sufficient: sufficient/stable income, can pay bills, little or no savings
- 3 - Stable: adequate income, able to meet basic needs, little left for non-essentials
- 2 - Vulnerable: inadequate income, occasional problems with basics, overdue bills
- 1 - In-Crisis: no money or basic needs, overwhelming debt, no knowledge of resources

Energy Assistance

- 5 - Thriving: ample personal resources to easily meet energy needs
- 4 - Self Sufficient: adequate personal resources to meet basic needs
- 3 - Stable: limited personal resources, community help needed to meet needs
- 2 - Vulnerable: shut off notice, less than 10-day supply, limited personal resources
- 1 - In-Crisis: power off, out of deliverables, no personal resources
 - N/A: included in rent
 - N/A: homeless

Employment

- 5 - Thriving: permanent/stable/sustaining employment, full benefits
- 4 - Self Sufficient: full-time or adequate employment meets basic needs, benefits
- 3 - Stable: under-employed, inadequate pay and benefits
- 2 - Vulnerable: temporary or part-time employment, no benefits, limited skills
- 1 - In-Crisis: unemployed with no prospects or skills
 - Not able to work

Medical Care

- 5 - Thriving: covered by insurance, practices medical/dental preventive medicine
- 4 - Self Sufficient: gets medical/dental care when needed, partial coverage
- 3 - Stable: gets medical/dental care with subsidy, inconsistent use of system
- 2 - Vulnerable: inappropriate/limited use and access of system
- 1 - In-Crisis: no coverage or access to medical/dental, ignores health problems

Pregnancy/Infant Care

- 5 - Thriving: receiving prenatal care, mother/child w/o health issues w/o subsidy
- 4 - Self Sufficient: receiving prenatal care/immunizations, well baby visits current
- 3 - Stable: adequate access/insurance/resources for prenatal care with subsidy
- 2 - Vulnerable: limited access/insurance/resources for prenatal care
- 1 - In-Crisis: no access/insurance/resources for prenatal care
 - N/A: not pregnant/no infant

Personal Assist Care

- 5 - Thriving: able to choose/afford personal in-home options of choice w/o subsidy
- 4 - Self Sufficient: access/insurance/resources for in-home personal care of choice
- 3 - Stable: adequate access/insurance/resources for in-home personal care with subsidy
- 2 - Vulnerable: limited access/insurance/resources for in-home personal care
- 1 - In-Crisis: no access/insurance/resources for in-home personal care
 - N/A: no need for chore services, or in-home personal or medical care

Mental/Soc/Emotional Health

- 5 - Thriving: no problems or able to choose and pay for mental health services
- 4 - Self Sufficient: access/insurance/resources for mental health care of choice
- 3 - Stable: adequate access/insurance/resources for mental health care
- 2 - Vulnerable: limited access/insurance/resources for mental health care
- 1 - In-Crisis: no access/insurance/resources for mental health care

Chemical Dependency/Abuse

- 5 - Thriving: no problem or 5 yrs free of drugs, treatment complete, no need of support
- 4 - Self Sufficient: year drug free, completed treatment, still receiving support srvs
- 3 - Stable: drug free, attending treatment program, receiving support services
- 2 - Vulnerable: chemically dependent, currently in treatment program
- 1 - In-Crisis: chemically dependent, not receiving treatment, no support services

Family Relations

- 5 - Thriving: strong supportive network, strong family identity
- 4 - Self Sufficient: physically safe, emotionally secure, sense of family unit
- 3 - Stable: negative behaviors, seeks change, some support
- 2 - Vulnerable: little or no interaction, household composition changes often
- 1 - In-Crisis: unable to develop relationships, no support systems

Parenting/Child Education

- 5 - Thriving: excellent parenting skills and/or developmental problems well handled
- 4 - Self Sufficient: good parenting skills or problems handled with support w/o subsidy
- 3 - Stable: resolving parenting issues or receiving services with subsidy
- 2 - Vulnerable: limited parenting skills or child development problems, limited resource
- 1 - In-Crisis: no parenting skills or child development problems w/o access/insur/resour
 - N/A: no children

Child Care

- 5 - Thriving: able to afford/access many options for child care
- 4 - Self Sufficient: easy access to licensed/acceptable or special needs childcare
- 3 - Stable: limited access to acceptable or special needs childcare with subsidy
- 2 - Vulnerable: limited access or no subsidy to acceptable or special needs childcare
- 1 - In-Crisis: no access/subsidy to acceptable or special needs childcare
 - N/A: no young children

Education, Adult

- 5 - Thriving: post-secondary education/training, positive attitude towards education
- 4 - Self Sufficient: actively pursuing post-secondary ed, values formal education
- 3 - Stable: high school diploma or GED, demonstrates some academic achievement
- 2 - Vulnerable: realizes value of ed, working on GED, improving literacy
- 1 - In-Crisis: history of school failure, doesn't value education, lacks basic skill

Community Involvement

- 5 - Thriving: actively involved in community affairs, positive contribution
- 4 - Self Sufficient: meaningful/supportive involvement, feel part of community
- 3 - Stable: minimal involvement, express desire for greater involvement
- 2 - Vulnerable: appears isolated, lacks motivation/confidence to be involved
- 1 - In-Crisis: no positive/constructive involvement, limited social skills

Legal Problems

- 5 - Thriving: no legal problem and not prone to legal problems
- 4 - Self Sufficient: minor legal issues pending or resolved, obtains legal council
- 3 - Stable: medium legal issues pending, has legal council
- 2 - Vulnerable: major legal issues or prone to problems, legal council issues
- 1 - In-Crisis: major legal issues, no legal council

TIMELINE

The timeline creates a family chronology, a running account of significant family events. Timelines can be completed for the family as a whole, for each family member, for a particular period of time or around a specific area, like employment, parenting, education or significant relationships.

To construct a timeline, draw a line across a sheet of paper, mark off yearly intervals and ask family members to note various events--good and bad--that seem significant to them. These might include: ***marriages, births, accidents, jobs gains and losses, chronic or serious illnesses, relocation, untimely deaths or suicide, divorces, or other life cycle transitions.***

Next, you will scale the family's life events between a -5 and +5 (scaling questions), asking them where they are on the scale. Then connect the dots so a picture of events emerges. Ask family members to point out any patterns they notice--***periods of difficulties and accomplishments, recurring obstacles, and solutions found to challenges faced.*** ***Note how these long-term patterns might be strengths or barriers to overcoming or achieving a goal.***

Timelines encourage family members to ask themselves:

"What problems have we faced, how do we feel about them and how did we face them?"

"What have been moments of success and celebration?"

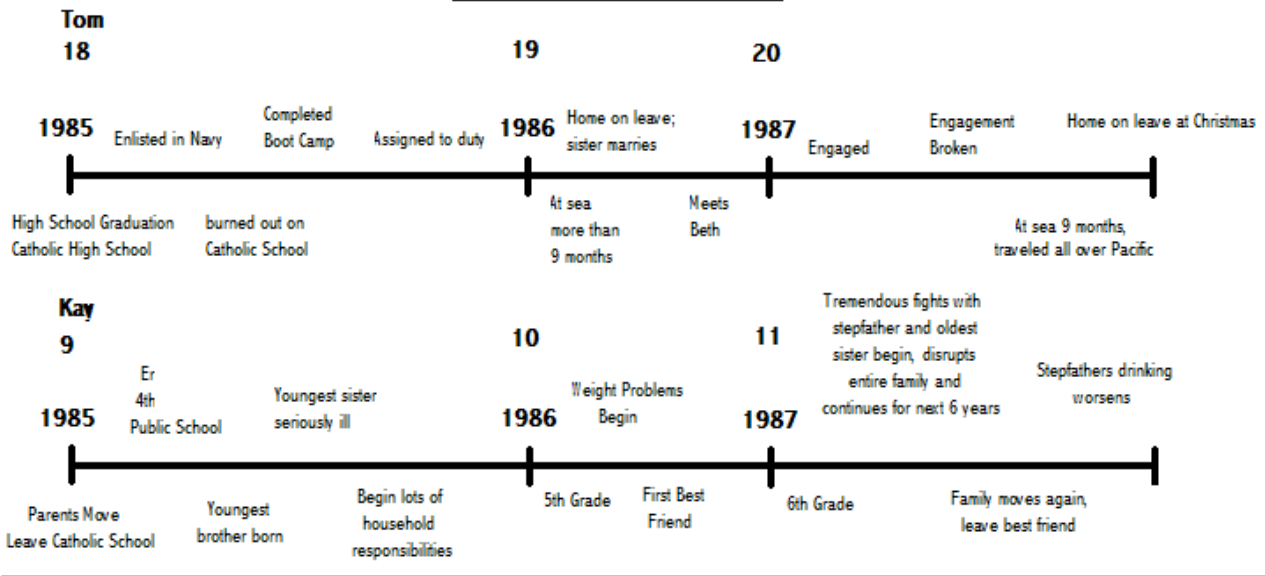
"How did we create those?"

"What are the patterns of our lives?"

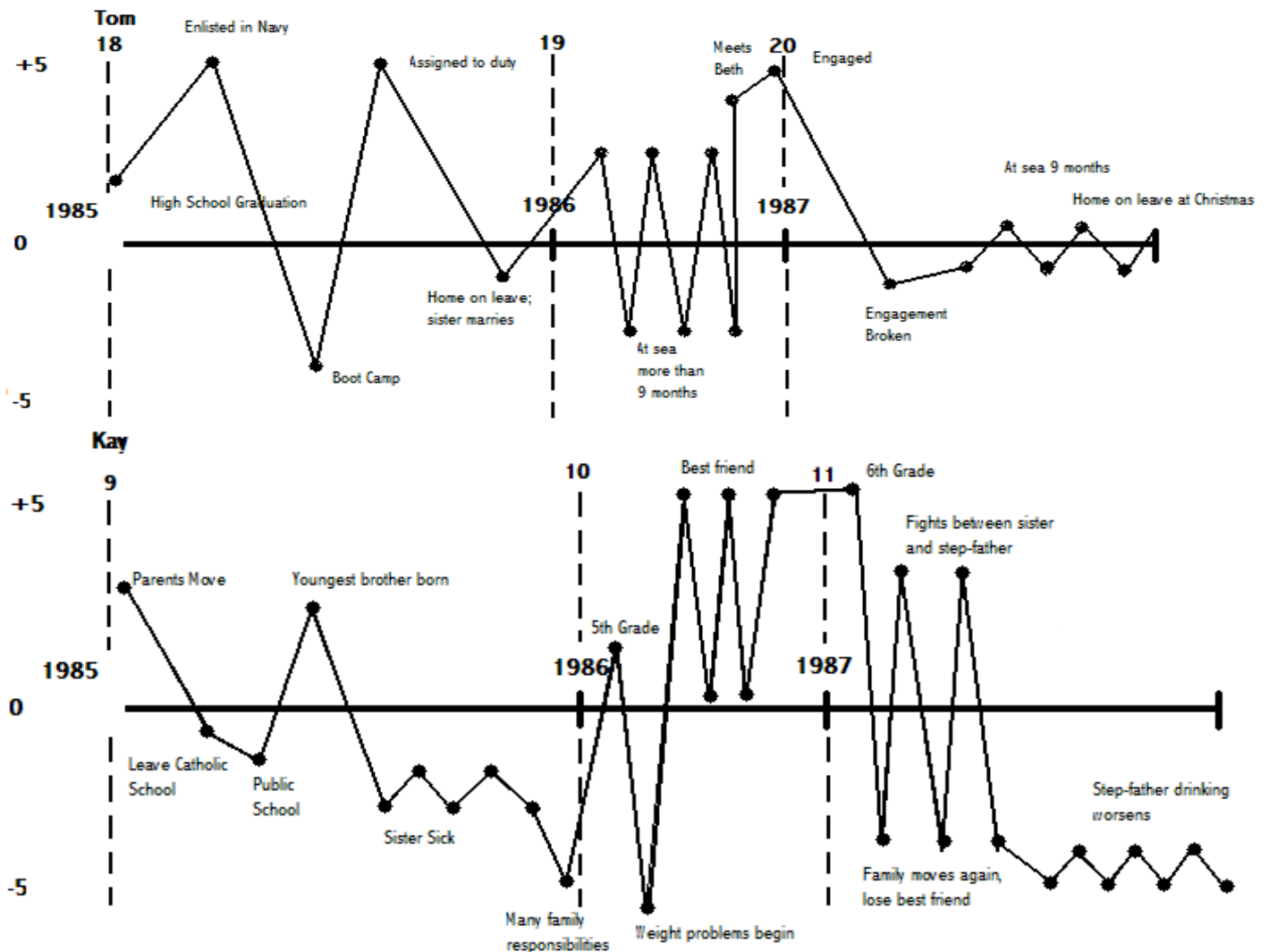
The timeline thus clarifies a person's understanding of a past or present problem, a recurring issue or a strength that can be built on. By comparing individual timelines, family members can compare experiences and appreciate differences in how they see and do things.

Once the timeline is completed, you and the family will have gathered a good deal of information about the strengths on which to build and the barriers that will need to be overcome.

Timeline: Version One



Timeline: Version Two



ECO-MAP

Eco-maps allow us to create a snapshot of the relationships a family has with other individuals and institutions.

We can determine how many relationships a family has and the nature of the relationships with the Eco-map. With this picture, the family can identify its current strengths and challenges with regard to support and their interaction with others. We can also identify families that are isolated and families overwhelmed by the number of stressful relationships.

You begin by asking the family who they would like in their inner circle. We should not make assumptions about who a family wants placed in the center. **It is up to the family to define its own membership. This is an example of empowerment.** Different cultures and family systems will identify membership differently.



Then ask the family to label the additional circles around the inner circle. Ask the family to tell you about the systems their family is involved with. These could include: ***school, health care, church, employment, the state agency, or other family members and friends. You could also show relationships with areas such as money, substance abuse, mental health, transportation, education and hobbies.***

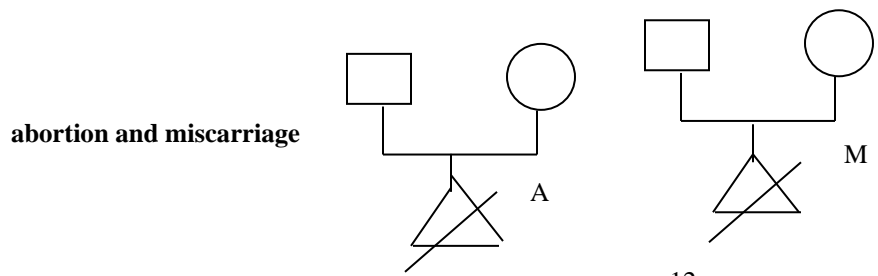
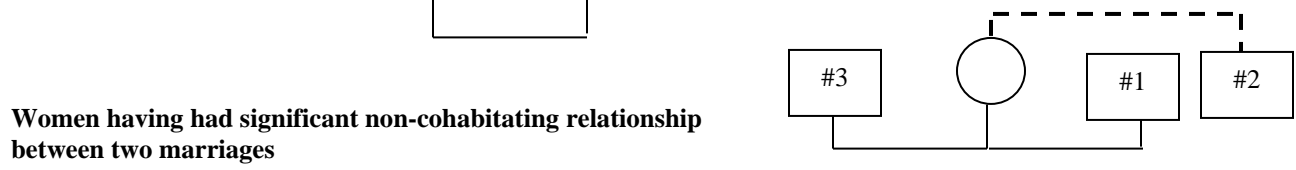
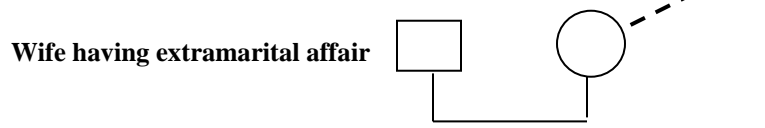
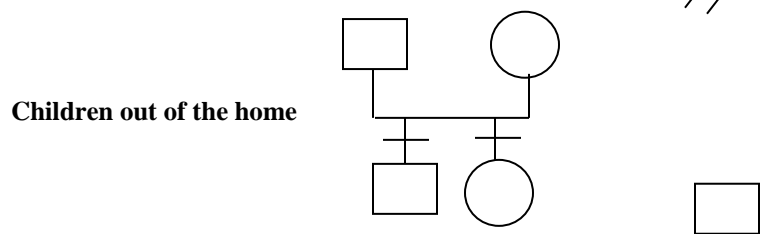
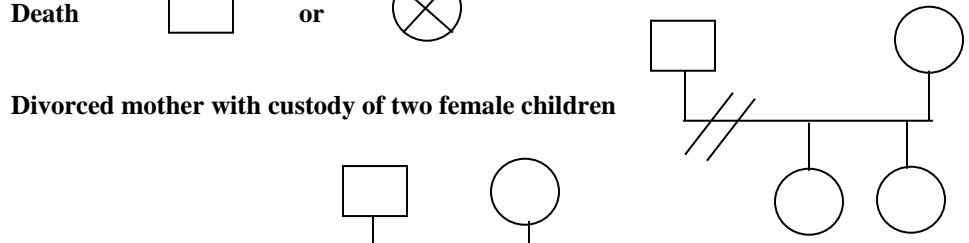
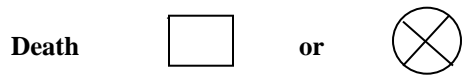
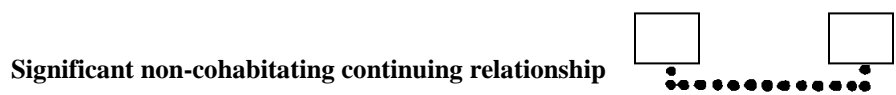
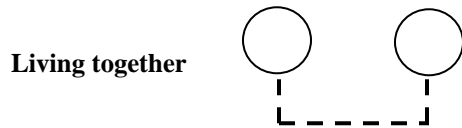
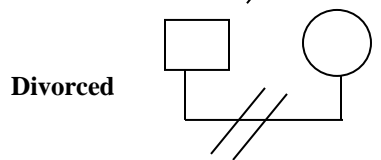
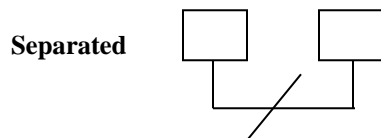
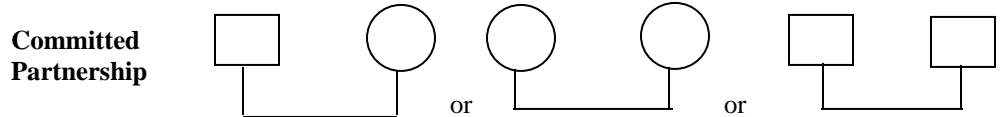
Once the circles are filled in, you will want to get a sense of the kind of relationships the family has with each support system. Are they **strong**, **tenuous/weak** or **stressful/conflictual**. You may also want to ask how much energy is used by the family in relation to each area.

Once the Eco-map is complete, ask the family what they notice. You may ask the family to identify the **strengths** they see, if there is anything they would like to **change or to be different**. You could say something like: ***“If we came back and looked at this eco-map in 6 months what would you like it to look like then?”***

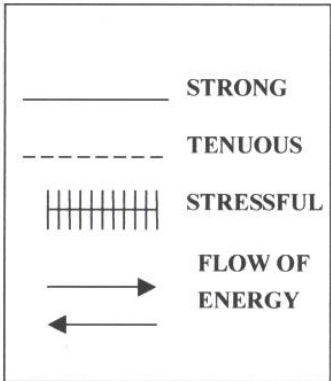
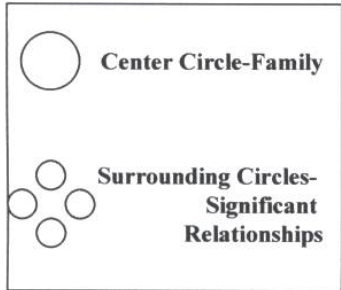
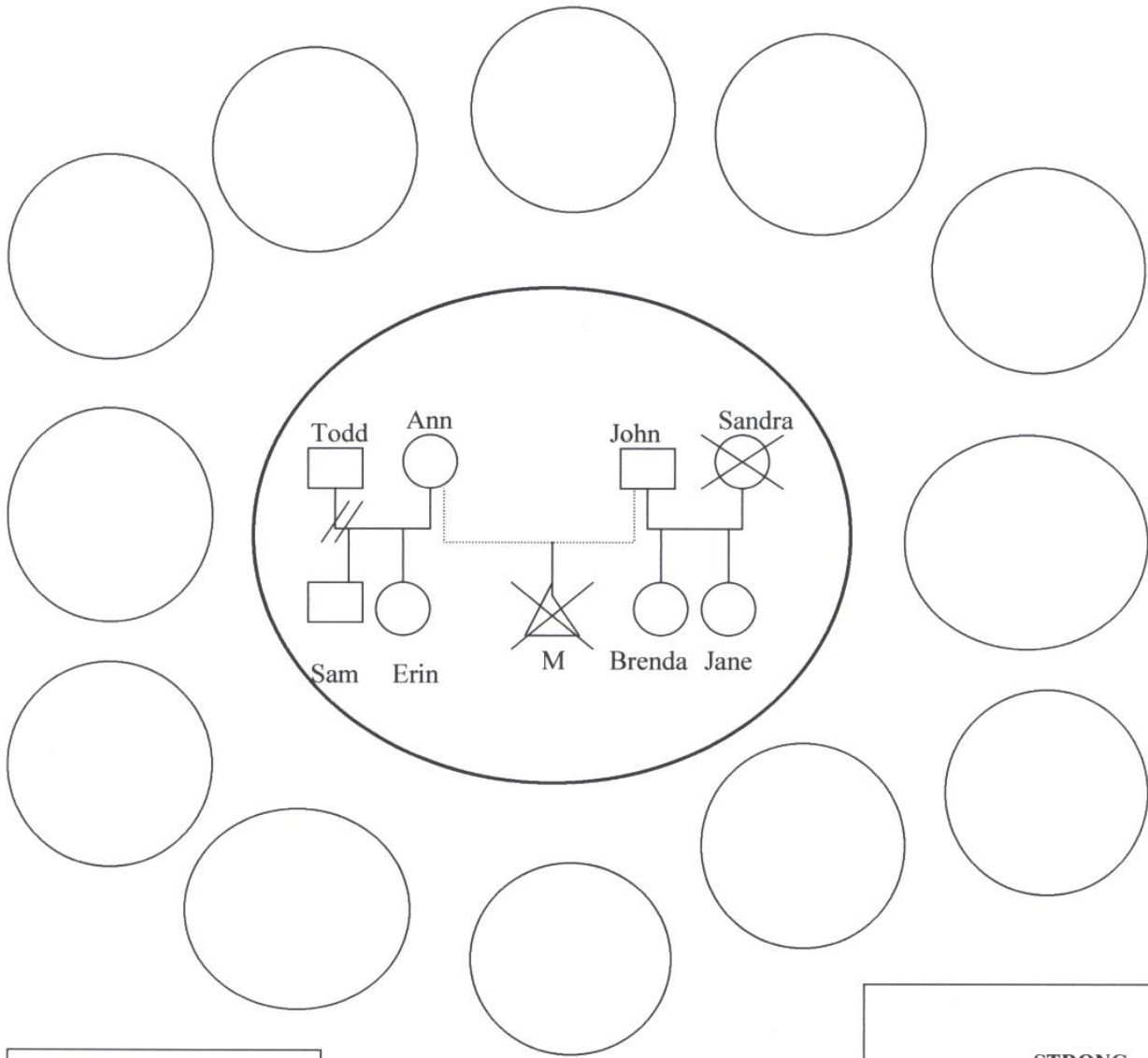
The Eco-map brings out important areas a family may have not yet explored and helps a family identify both current strengths and a vision for the future. It can help pick out generational patterns, validate feelings and allow the Family Development Specialist to elicit factual information and emotional material in an easy digestible, straight-forward and light hearted way.

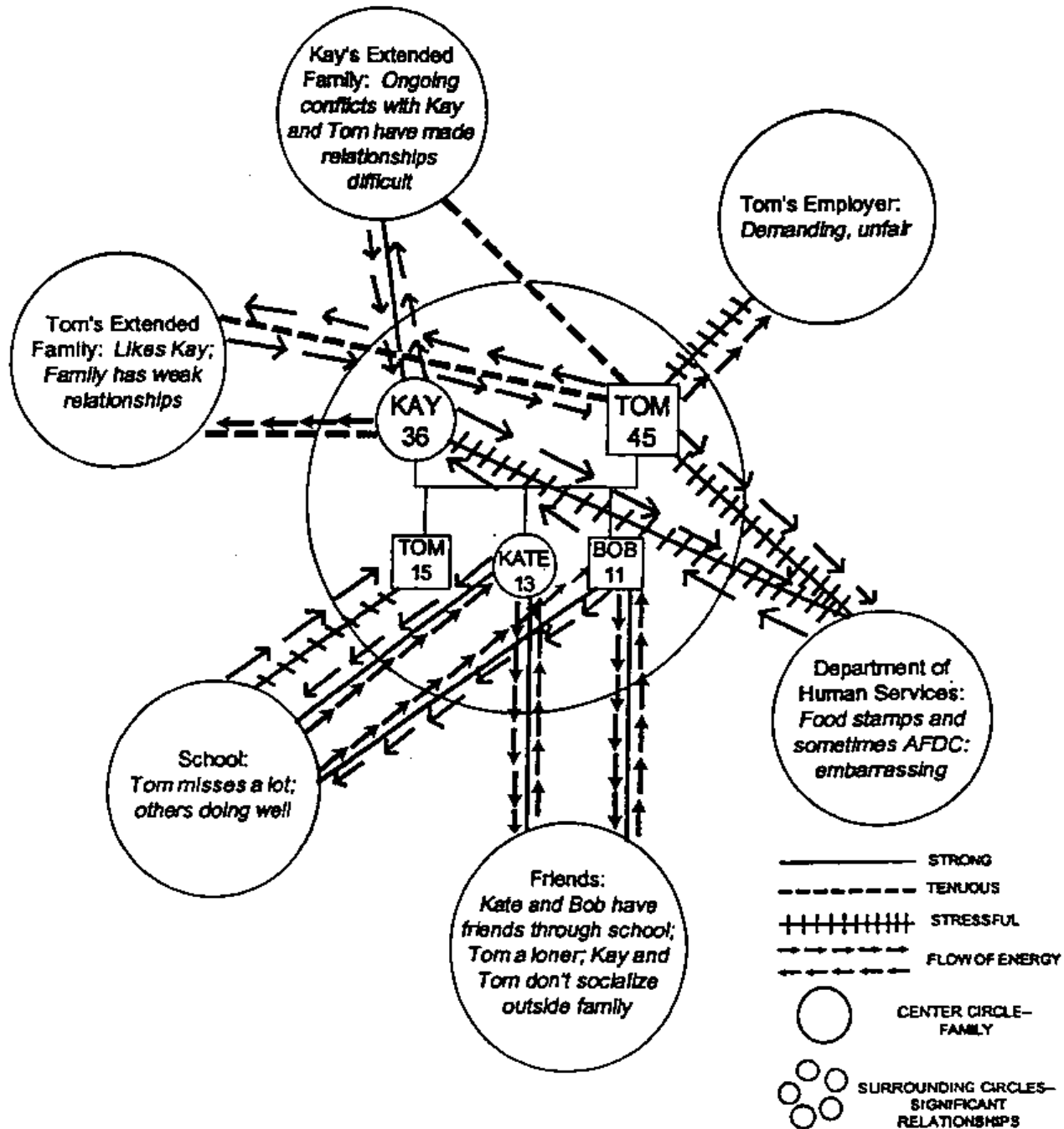
CONVENTIONS OF DIAGRAMMING FAMILY STRUCTURE

Male  Female 



ECO-MAP





McAfee, Empowering Families to Move out of Poverty, 1993.

VISION BUILDING

1. Describe how you would like things to be for your family tomorrow.

2. Describe how you would like things to be for your family next week.

3. Describe how you would like things to be different in one month.

4. Describe how things will be different for your family in six months.

5. Describe how things will be different for your family in one year.

6. Describe, given all the changes you want to make, where your family will be five years from now.

How To Use The Balance Wheel

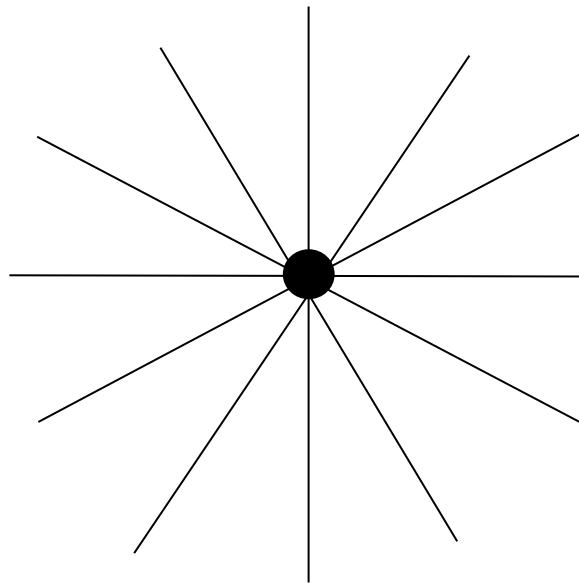
The purpose of the Balance Wheel is to give you a different perspective on how you view your life, priorities and what goals you may want to set.

- First, identify the areas of your life that you feel are important. Below is a list of examples you can use.
- Second, label each gap in the wheel with an area on the list, until your list is in a circle around the wheel. You can add or remove “spokes” from you wheel to accommodate your list.
- Third, make some sort of distinguishing mark across the gap that reflects the energy you are putting into this area of importance in your life on a scale from 1 to 10 (1 being the center of the wheel and lowest and 10 being balanced for you at the edge of the wheel). Be very honest with yourself when doing this. Consider time, money, effort and sacrifices you make to invest in this area of life. You can color this in, or mark it in a way that you will know what it is representing.
- Fourth, with a different notation or color, fill in the gap between your marking and the edge of the wheel to reflect the energy you still need to give this area to create balance. Take a moment to reflect on your balance wheel and the “balance” in your life and goals.

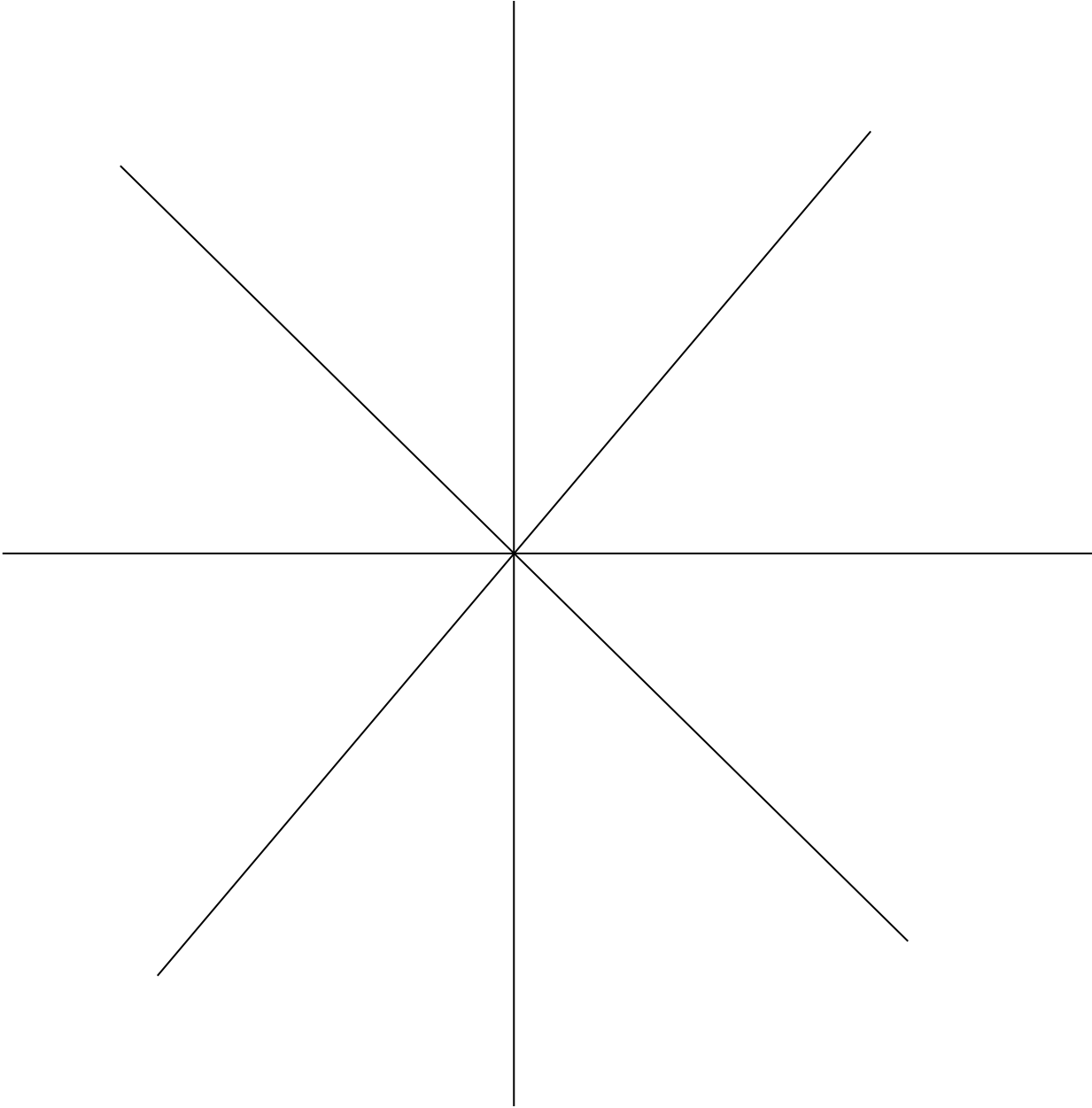
A wonderful use of this tool is, once it’s created, you will be able to view your life and see the areas that need a bit of work. You can then work on setting meaningful, attainable goals that will help you achieve your view of a balanced life. And don’t forget to give yourself credit for the areas you are doing well in!!

Life Area Examples:

1. Family
2. Personal
3. Community
4. Education
5. Health/Physical
6. Health/Mental
7. Recreation/Leisure
8. Spiritual
9. Friends/Relationships
10. Career/Job
11. Sports
12. Social
13. Finances



BALANCE WHEEL



BALANCE WHEEL

