



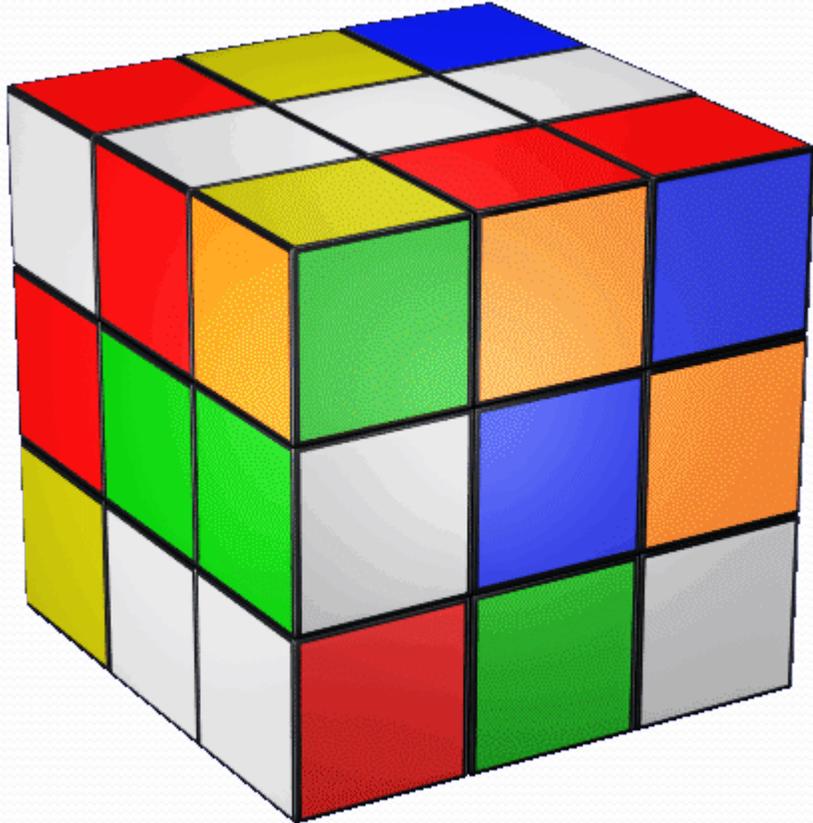
Successful Tools for Case Managers

Jodie Sue Kelly cygnetassociates.com

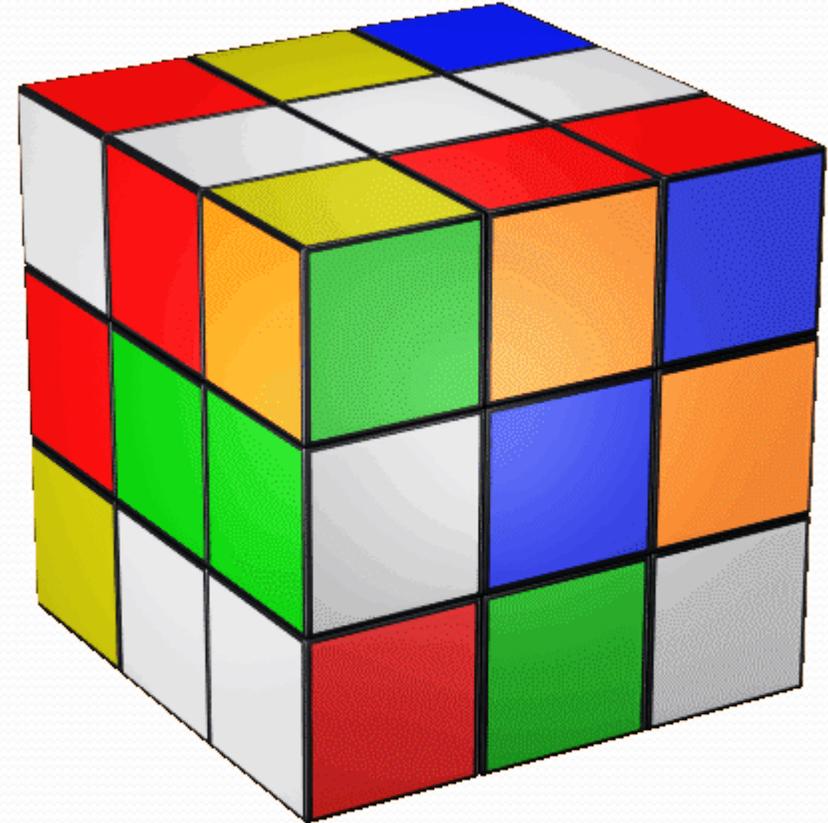
Agenda: Overview Course

- **Building Participation in Orientation**
- **Assessment and Planning**
 - **What Is Job Ready and**
 - **How do I get them There?**
- **Goal Setting**
- **Effective Case Notes**

Two Major Challenges That Need Simultaneous Solutions



Participation/
Compliance

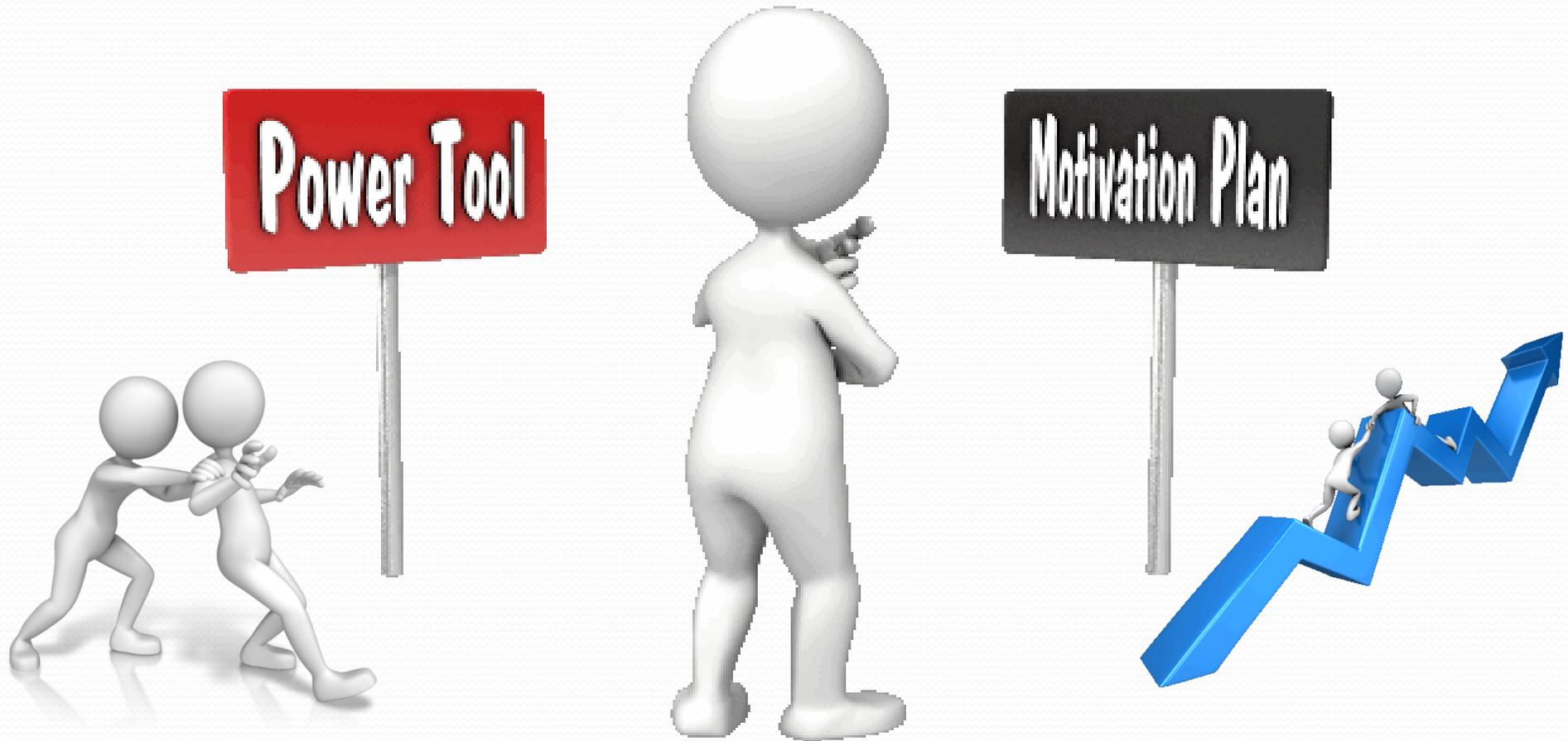


Placement

Most Systems Strongly Lean Toward Compliance



“We have a participation problem.
Where do I find the solution?”



Power Tools

Coerce

Threaten

Fiat

Punish

Sanction

Brow Beat

Strong Arm

Intimidate

Command

Compel

Pressure

Dominate

Demand



Motivational Strategies

Inspire
Persuade
Reason
Convince
Boost
Encourage
Excite
Fuel
Spark
Support

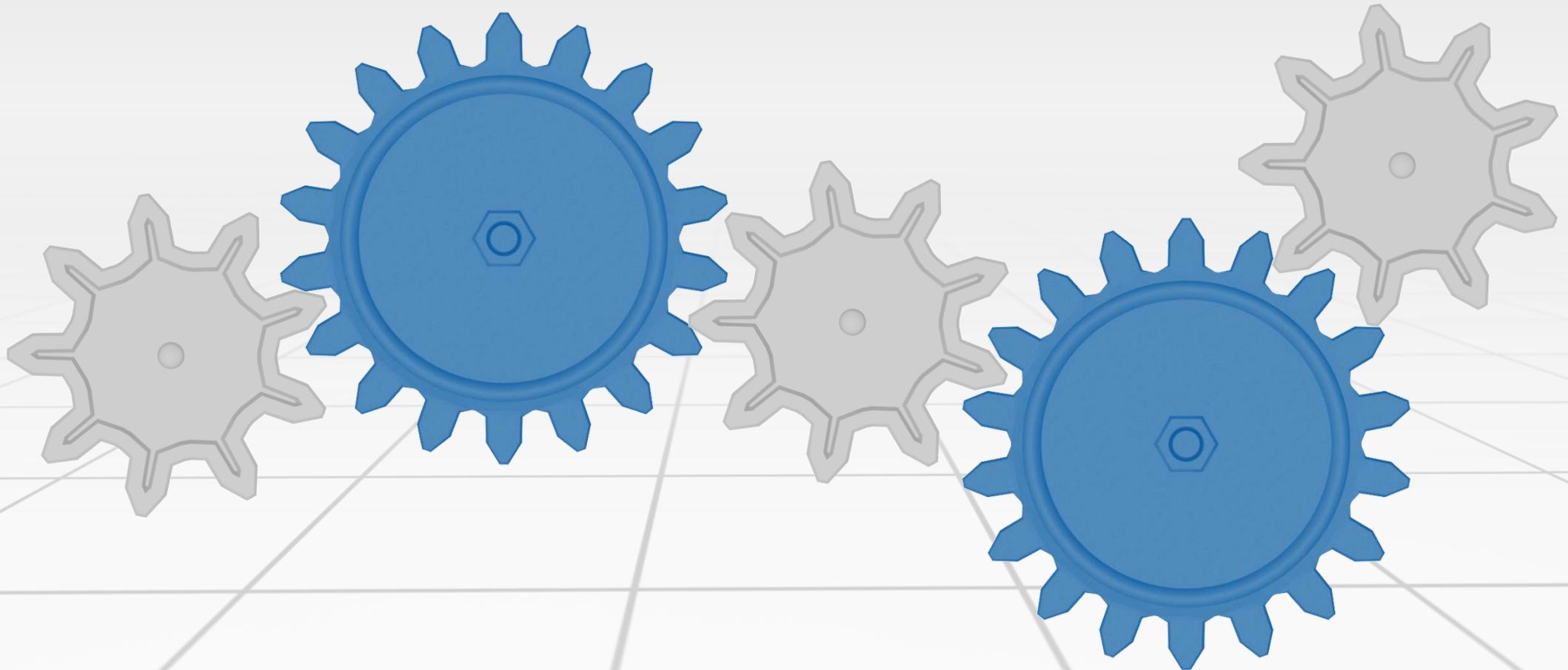
Motivate
Stimulate
Spur
Induce
Invigorate
Strengthen
Energize
Fire Up
Rally
Encourage



Prime Opportunities to Build Engagement



Theme: Pick a Selling Proposition that Motivates



In your experience, which of the three most accurately depicts the motivation of the person applying for aide?

I applied for TANF because I was hoping to get an Individual Responsibility Plan.

I applied for TANF because I want help becoming self sufficient.

I applied for TANF because I need money.





What's Your Theme? What Are You Selling?

Compliance

Short Term Messages

- Get A Job
- Get Training
- Get Training and A Job

Longer Term Messages

- Self-Sufficiency
- Build a Career Pathway
- Career Advancement
- Income Improvement



Messaging



“Okay, your application to give you temporary help in the form of cash and food stamps has been approved. This will buy us some time as we work to provide a more secure financial solution to you and your children. Together you and I will work to help you create a plan to improve your income without the need of cash aid and food stamps.”

Tip: Start with the “theme” at the beginning.



Orientation: The Pressure is On!

Boringly, Dull, Energy-Draining Orientation That Negates Your Outreach Work



Fill Out Paperwork as Applicants Enter

Staff Introductions

Mission of the Organization

History of the Organization

Eligibility Requirements:

Income

Barriers

Residency Requirements

Review of Calendar of Training Workshops

Rules at the Center (dress, smoking, etc.)

A review of the various staff and their roles

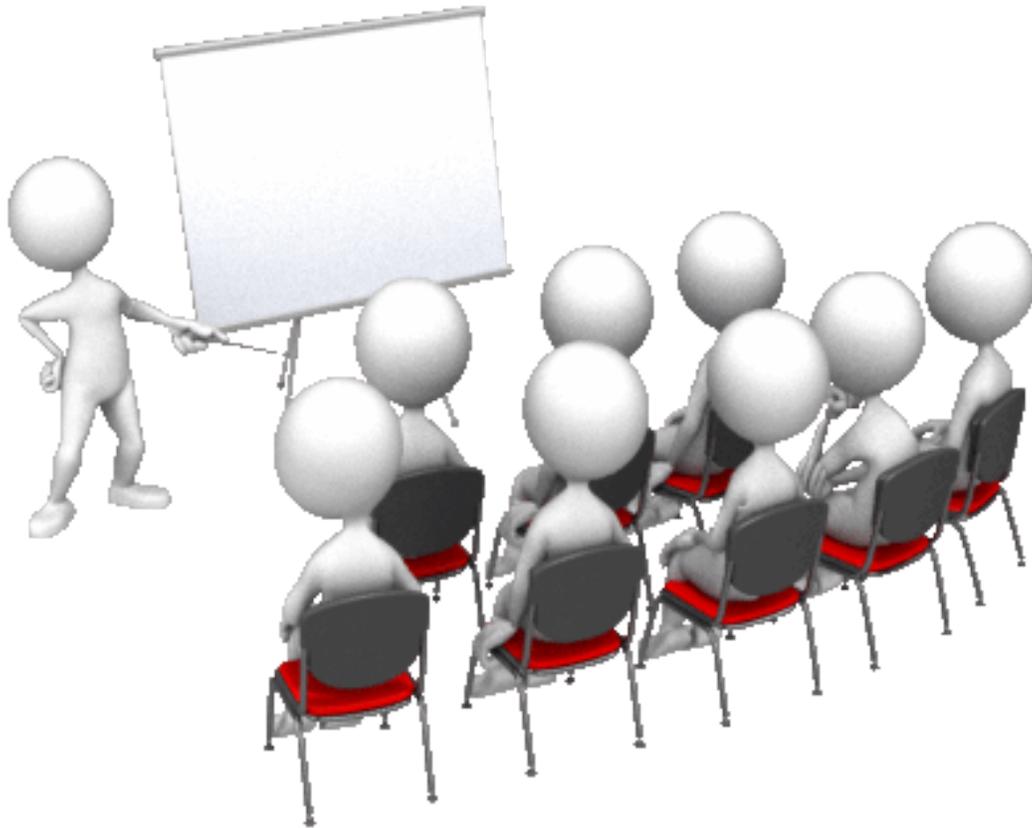
Steps in the Process

Big Ending: Let's take the CASAS/TABE.

Questions?

**Bad Underlying
Assumption:
the applicant has
already made
"purchase"
decision.**

Sample from Somewhere: TANF Introduction



Who is (TANF Provider) (Name of Program)?

- ▶ *“Helping Government Serve the People”*
- ▶ TANF Provider (Name of Program) is a for profit business contracted by the State of X, Division of Public Assistance to provide case management services for recipients of TANF cash benefits
- ▶ TANF Provider has the responsibility to follow State and Federal guidelines that govern the Any State TANF Program.
- ▶ TANF Provider Staff are dedicated to assisting families in working toward their employment goals and continues assisting even after families reach self-sufficiency if you meet criteria



What are you required to do to receive temporary cash assistance?

Anyone receiving TANF is required to:

- ▶ Follow all rules and regulations of the program so that you can qualify for the maximum benefit amount
- ▶ Participate in 40 hours per week of approved work activities to gain and maintain employment and self-sufficiency
- ▶ Submit required documentation to verify participation in work activities as outlined on your individual Family Self-Sufficiency Plan
- ▶ Report any changes in household composition, living situation, expenses or income to DPA and to your TANF Provider Case Manager within 5 days of the date of change



What are Work Activity Requirements?

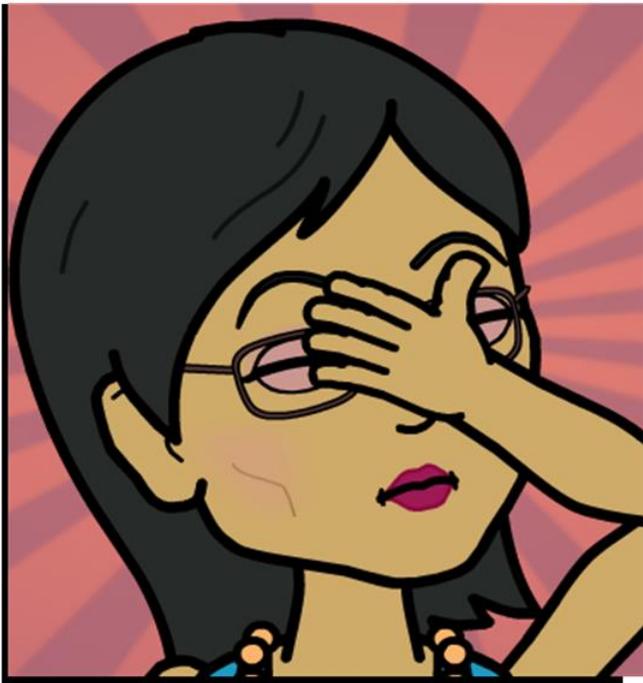
Readability Formula	Grade
<u>Flesch-Kincaid Grade Level</u>	15.2
<u>Gunning-Fog Score</u>	16.1
<u>Coleman-Liau Index</u>	19.8
<u>SMOG Index</u>	13.9
<u>Automated Readability Index</u>	16.1
Average Grade Level	16.2

- ▶ Approved Work Activities have been determined by State and Federal regulations, and all activity must be verified by approved documentation
- ▶ Some examples of approved work activities are: Supervised Work Search, Job Development Activities and Paid Employment
- ▶ Some examples of approved verification of activities are: paystubs, homework logs, and signed activity logs if participating in other approved work search/learning activities
- ▶ Work Activities are assigned based on individual employment goals and steps needed to reach those goals
- ▶ Discuss specific work activities you participate in and the verification needed with your Employment Advocate

What do you mean by "Self-Sufficiency?"

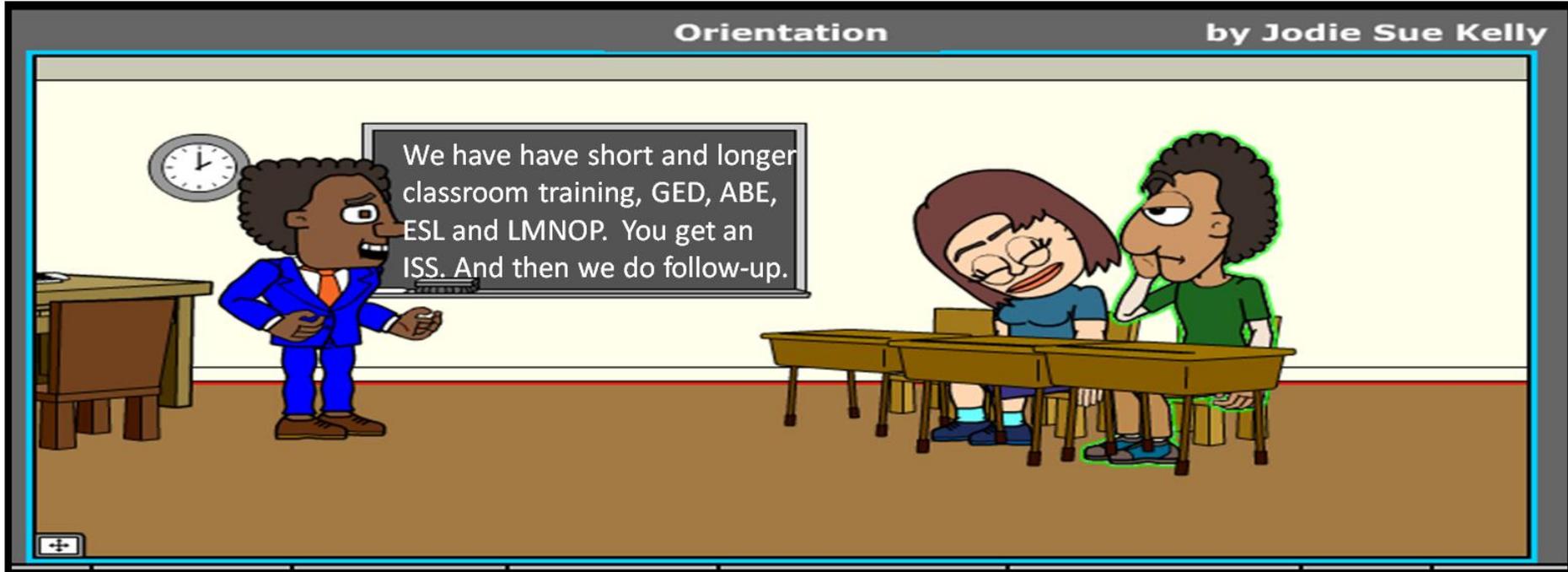
- ▶ What does "self-sufficiency" mean to YOU?
- ▶ What do I need to do to reach self-sufficiency?
- ▶ What would it take for my family to close our TANF case and no longer be reliant upon Public Assistance?
- ▶ How does the Any State Temporary Assistance Program define "self-sufficiency"?
- ▶ What happens when I find work?
- ▶ What can I expect from TANF Provider after I reach self-sufficiency and close my case due to employment?





People don't want "services". They want the outcome. Motivate through outcomes.

Avoid Jargon that even your own families don't understand.



What's Your Theme? What Are You Selling?

Short Term Messages

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- Get Training
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Longer Term Messages

- Self-Sufficiency
- Build a Career Pathway
- Career Advancement
- Income Improvement



Sample Fun, Informative Motivational, Engaging Orientation

Welcome and Introductions

Get Acquainted

Agenda for Orientation

Expectations/Want to Know

Overall Goal of Organization (Increase Income)

How it Works (Training/Scholarships/Jobs/Advancement)

It Takes A Team

What Others Have Said

Goal Setting Activity

Rules and Responsibilities

What Happens Next?

Questions and Answers

Candy Mania



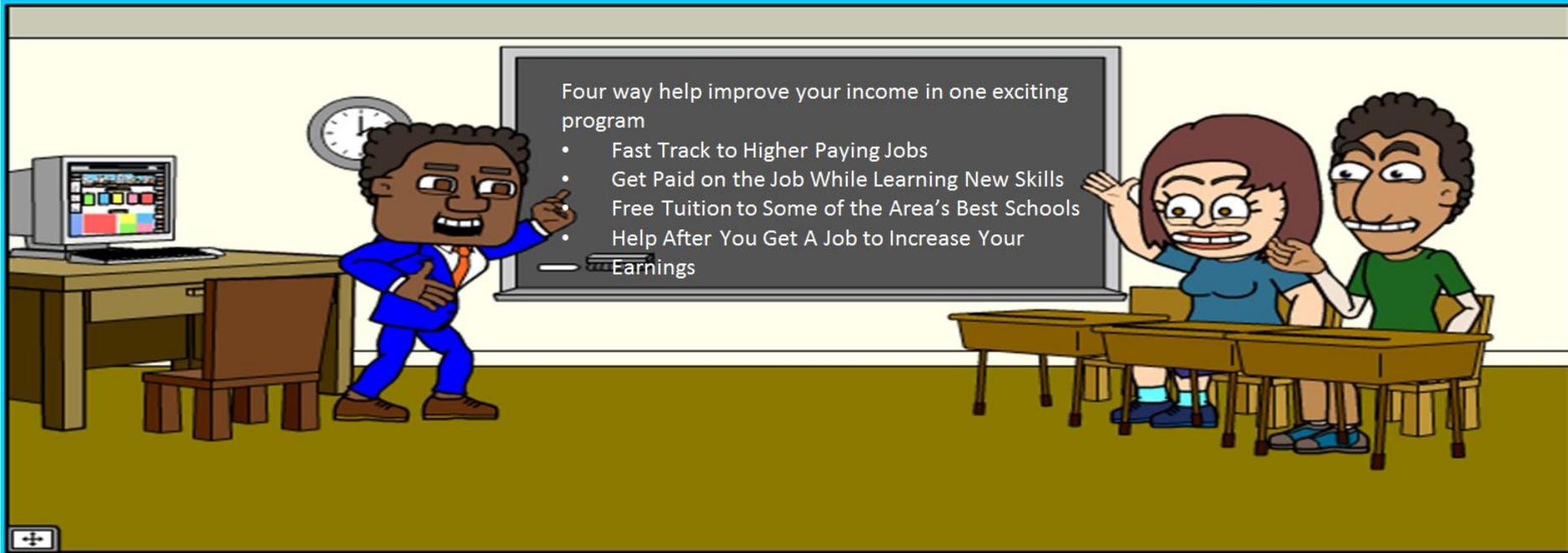


Sell Outcomes, Benefits

Messages from their perspective.

'Benefits Presentation'

by Jodie Sue Kelly



- Four way help improve your income in one exciting program
- Fast Track to Higher Paying Jobs
 - Get Paid on the Job While Learning New Skills
 - Free Tuition to Some of the Area's Best Schools
 - Help After You Get A Job to Increase Your Earnings

Later, that evening.....

Cool. Do you think they would help me?

So I had my meeting today and they told me that they want to help me earn more money. We sure could use that.

'Discussion |

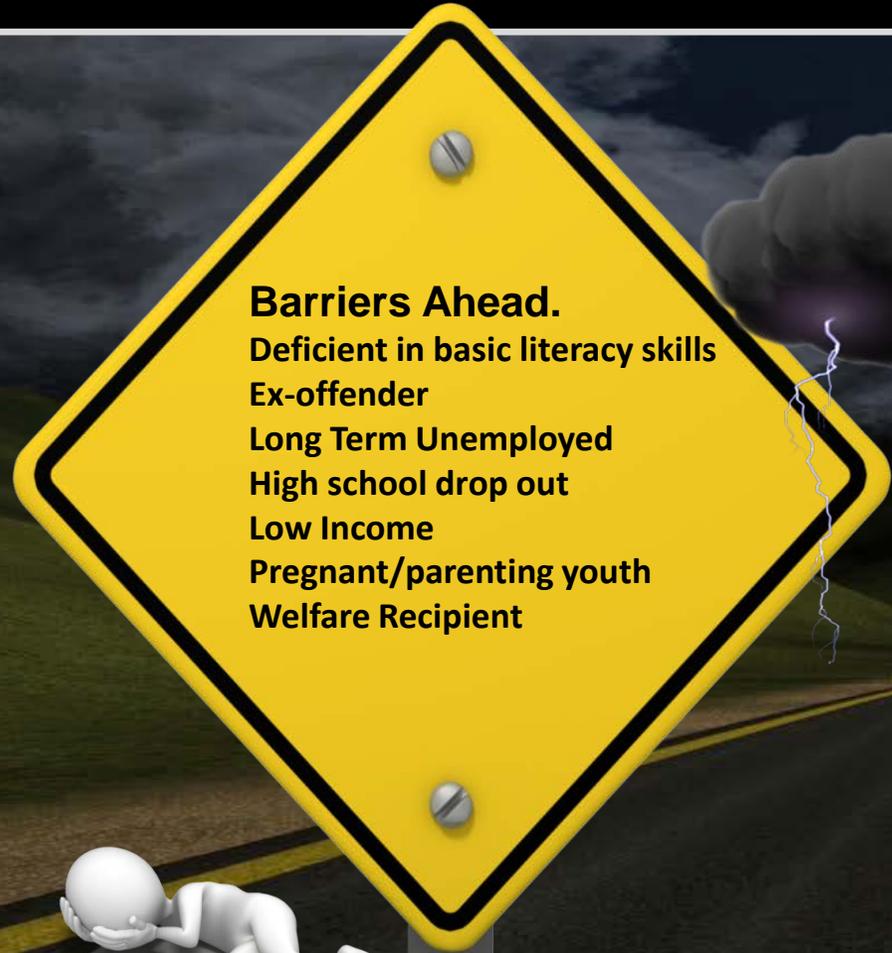
by Jodie Sue Kelly



Are We Using Motivational Phrasing that Builds Excitement Or Bureaucratic Terminology that Customers Don't Understand.

1. We have vocational training in a skill, trade or occupation.
2. We have skill training, job search workshops and academics.
3. You can get a GED and tutors to help you move through quickly.
4. We can offer you free tuition at some of the area's best schools.
5. You can earn some money while you complete your education.
6. You will catch up on your math and reading skills.
7. One thing you will learn here that can help cut your job search time is how to submit an online resume. You'll learn the tricks of how to successfully submit a resume that gets noticed.
8. We have placed more than 50 mandatory customers in jobs this year.
9. We have workshops on job search and career planning that you are required to attend.
10. With the right training, you can to work and get a higher salary than you might be able to earn otherwise.
11. Services to get you working and earning more than cash assistance will ever pay.
12. We can supply job postings and information about projected earnings and skills necessary to obtain those jobs.
13. We offer life skills classes on budgeting, stress management and job interviewing.
14. Everyone must go through diagnostic testing and assessment to identify goals, barriers, strengths and weaknesses.
15. On a job you can get raises, promotions, and more hours. That gives you more money.





I have so many barriers
I won't make it.



How well meaning workforce programs reinforce low self esteem, raise the psychological price and turn off potential clients.

Words We Should Banish from Using in Ads, Websites, Orientation, Dialogue and Plans

Barrier



Drop Out



Offender



Disadvantaged



Low Income



Long Term Unemployed



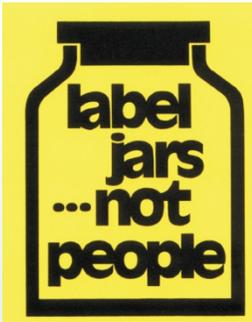
Identified Challenges:

Please select the challenges from the list below that would prevent the customer from going to work.

Reading/ Writing Skills Below 9th Grade	Advanced training (College, OJT, Etc.) U.S.	Lack of Skills in an Occupation
English as a Second Language	Citizenship/Legal Status	Valid Social Security Card/Driver's License
Childcare	Transportation	Need H.S. Diploma/GED
Criminal Record	Domestic Violence	Upcoming Court Appearances
Ability to work under supervision	Willingness to Change/Adapt/Learn	Clothing/Uniforms/Tools required for job

Assigned Activity	Responsible Party	Start
<input type="checkbox"/> Assessment- TABE Participant has completed the TABE Assessment. TABE has indicated that participant has achieved a total battery score of _____.	Participant	
<input type="checkbox"/> Assessment -CAREERSCOPE Participant has completed the CareerScope Assessment. CS has reviewed the results of the CareerScope with the participant and the results indicate that the participant has a strong interest in _____ career cluster.	Participant	
<input type="checkbox"/> Job Search Participant will participate in Intensive Job Search Activities, including resume assistance, interviewing techniques, networking events, in house recruitments and additional seminars. Participant understands the program goal of securing unsubsidized employment and if at any point secures employment (PT or FT), will notify the CS immediately.	Participant	
<input type="checkbox"/> Work Experience Orientation Participant has attended mandatory Work Experience Orientation at the CSCF Office.	Participant	
<input type="checkbox"/> Work Experience Enrollment Participant is determined to be in need of WIA training assistance. Participant has been determined eligible for the WIA Work Experience Program. The participant will begin the work experience assignment on ____/____/____ with the _____ agency in _____ position. Participant is responsible for arriving at the WE worksite on time each day, working assigned hours- maximum of 40 hours per week, following all safety rules and adhering to the rules and regulations of CSCF's WE Program and the Worksite Agency. The participant is responsible for successfully completing their worksite assignment for the full duration of the ____ week program. The participant will work directly with the WIA Placement Specialist and Worksite Supervisor during planned and unplanned monitoring visits to discuss any issues/concerns.	Shared	

Assigned Activity	Responsible Party	Start
<input type="checkbox"/> Training Research Participant has completed has reviewed the CSCF Approved Training Matrix and completed the Training Research Form.	Participant	
<input type="checkbox"/> Occupational Skills Training Participant is determined to be in need of WIA training assistance. Participant will enroll into _____ for the _____ program. Participant understands they are responsible for successfully completing training and expected to attend all classes and maintain an acceptable GPA.	Participant	
<input type="checkbox"/> Transportation: <input type="checkbox"/> Gas Card <input type="checkbox"/> Bus Pass <input type="checkbox"/> N/A Participant may be provided transportation on an on-going as needed basis. All support services are subject to funding availability.	Shared	
<input type="checkbox"/> Monthly Contact Participant understands monthly contact is required and Career Specialist will contact them every 30 days.	Shared	
<input type="checkbox"/> Post-Program Job Search At completion of training, participant understands if they have not secured employment they will be required to participate in Job Search Services. The participant understands the program goal of securing unsubsidized employment. If at any point you secure employment (PT or FT), the participant will notify the CS immediately.	Shared	
<input type="checkbox"/> Post Case Closure Follow-Up Participant understands they may be asked to participate in customer satisfaction surveys (local and statewide) to gauge their level of success with WIA. The WIA CS will contact the Participant for up to one year following the completion of the WIA Program for post closure follow-up.	Shared	
<input type="checkbox"/> Other: Participant work site information change <input type="checkbox"/> Start Date <input type="checkbox"/> End Date <input type="checkbox"/> Change in worksite _____ <input type="checkbox"/> Position _____		
<input type="checkbox"/> Other:		



We assign negative labels to people and call them “barriers”.

Deficient in basic literacy skills

Ex-offender

Documented disability

High school drop out

Homeless/runaway

Foster care

Pregnant/parenting youth

Needs additional assistance



You have some situations or challenges that need to be planned around.

- Need help in reading and math
- Need help to find an employer who isn't concerned about a criminal record
- Need to plan around a learning, physical or mental disability
- Left school prior to graduation and so needs GED or diploma.
- Doesn't have a place to call “home” and is living with a foster family or in a shelter.
- Need to consider his or her baby as part of the plan for school or work.
- Need to provide other assistance getting into school or into a job.

Strategies to Pull Em In





Shelia Brooke's Time On Welfare to Work:

48 total-23=25 Remaining

48	47	46	45	44	43	42	41	40	
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0

Save Your Months on Welfare to Work.

Life is full of unknowns.



Shelia Brooke's Time On Welfare to Work:

48 total-23=25 Remaining

48	47	46	45	44	43	42	41	40	
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0



Shelia Brooke's Time On Welfare to Work:

48	47	46	45	44	43	42	41	40	
39	38	37	36	35	34	33	32	31	30
29	28	27	26	25	24	23	22	21	20
19	18	17	16	15	14	13	12	11	10
9	8	7	6	5	4	3	2	1	0

Time Flies...
Plan For Your Future Now.

_____. You must **discuss** with me the reason for this failure and arrange counseling **within 10 calendar days** or you may be sanctioned, which may cancel or reduce your temporary cash assistance and/or your food assistance benefits.

If the reason you did not comply with your assigned activity is because you need assistance, we may be able to help you. If we agree you need services for your situation, we will refer you for these services. For example, if you need childcare to comply with an assigned activity, we may be able to assist you with the needed childcare. You may also have another good reason why you did not comply.

Good reasons for not complying with your assigned activity may include:

•If you have one of the above, or another good cause reason, please let us know. You may be able to receive additional services or comply with other activities that fit your situation better. If you are working, you may be eligible for transitional services if your temporary cash assistance is cancelled. Transitional services include childcare, Medicaid, transportation, and education or training.

If you do not *personally discuss* with me the reason for failure by %DATEPLUS10%, a level ____ sanction will be requested. Sanctions do not affect your Medicaid. IMPORTANT: If you have more than one failure without good cause within a 30 calendar day period, you will be sanctioned. *The penalties for failing to comply with an assigned activity or comply with an alternate requirement plan are listed with this notice.*



Tip: Review Your Reading Levels

A Reading Level Assessment of Materials Designed for Clients

Readability Formula	Grade
<u>Flesch-Kincaid Grade Level</u>	10.3
<u>Gunning-Fog Score</u>	13.1
<u>Coleman-Liau Index</u>	12.1
<u>SMOG Index</u>	9.7
<u>Automated Readability Index</u>	10.7
Average Grade Level	11.2

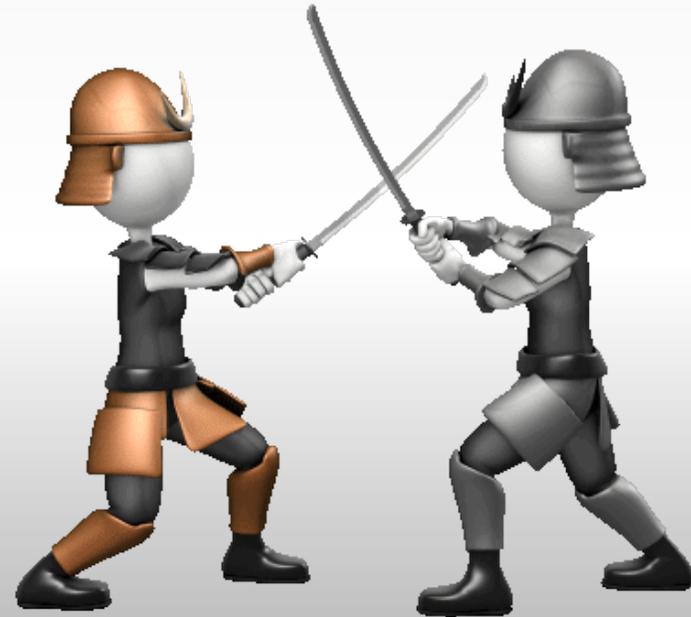


<https://readability-score.com/>

Simple Graphic Message



Central Challenge For Workforce Programs



**Employer
Services**

**Case
Managers**

Attitudes of Too Many of Our Job Seekers.

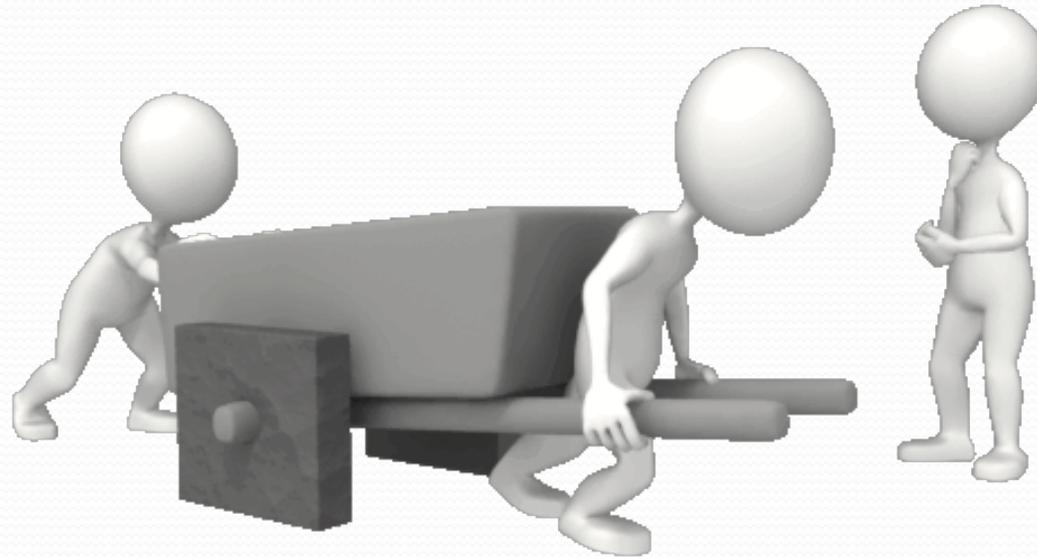
I want to go to school but I am not sure that I want to work.

I better be able to take time off when ever I want or I am out of there.

I would take this until I found something better.

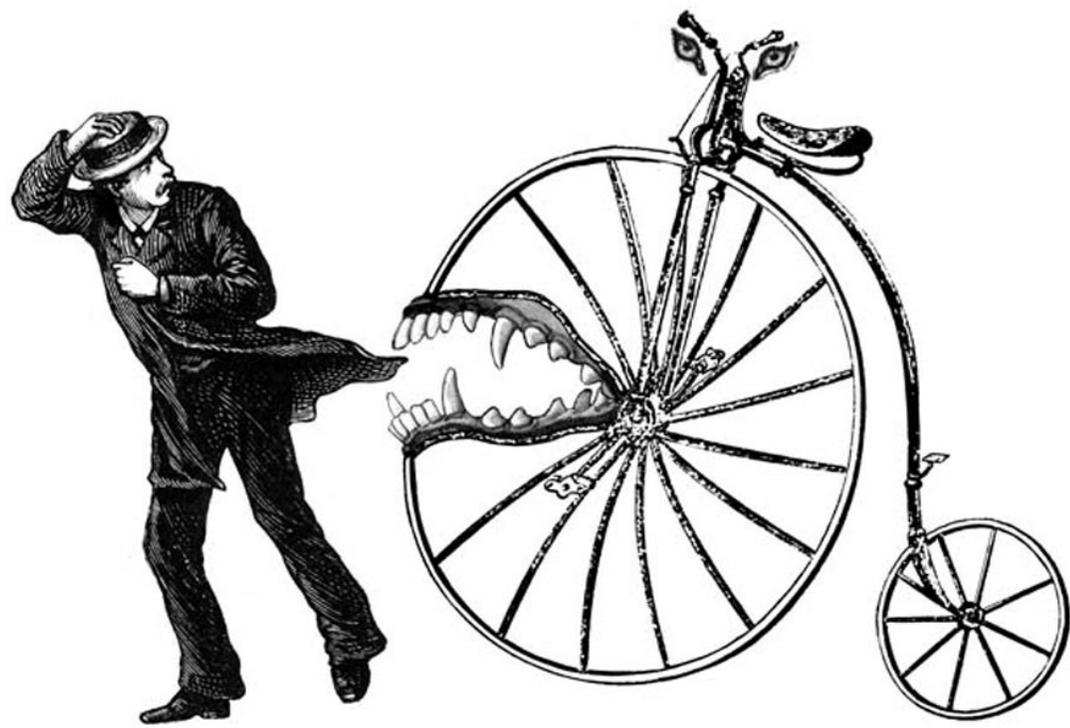


***It's a Heavy Lift to Sell Something
That Doesn't Work.***



Employer is Dissatisfied





A VICIOUS CYCLE

What does it look like when someone is competitive for a job?

What are Minimum Standards customers should meet before you give them a Career Source seal of approval?



What job search tools do they need?



What job retention skills/attitudes do they need to possess?

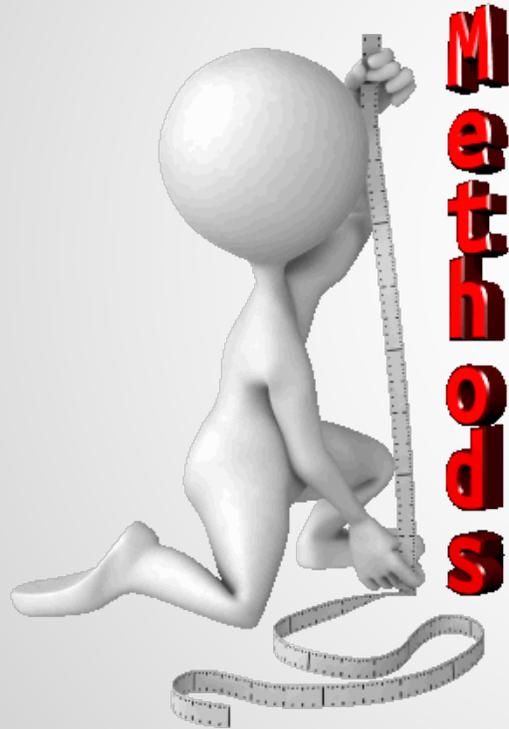


What occupational, academic skills/qualifications do they need?



What life challenges do they need to have plans/strategies around?

4 Ways to Conduct Assessments or Gather What To Build Job/Retention Success



- Self-Assessment
- Observation
- Structured Interview
- Formal Assessments

SELF ASSESSMENT

Job Search Tools

Yes No	Do you have a resume?	Yes No	Do you know how to answer difficult questions at a job interview? (Gaps, Reasons for leaving, conviction as examples).
Yes No	Do you know how to submit an online application?	Yes No	Do you have three professional references for a job?
Yes No	Do you have a cover letter that goes with your resume to submit for jobs?	Yes No	Do you know how to answer the “personality questions” asked on an online application?
Yes No	Do you have an email address for employers to use to contact you? If yes, what is it? _____	Yes No	Do you know what type of job you want to apply for?
Yes No	Do you have clothing that is appropriate to wear to a job interview?	Yes No	Do you have a contact phone number for employers to use? (Would get the message within hours)
Yes No	If an employer looked at your Facebook or other social media page, is there anything on it that you wouldn't want a potential employer to see?	Yes No	Can you list 10 marketable skills to an employer during an interview?
Yes No	Do you know how to use job search websites such as Indeed.com and SimplyHired.com?		







Telling: Low Impact for Attitude and Behavioral Change

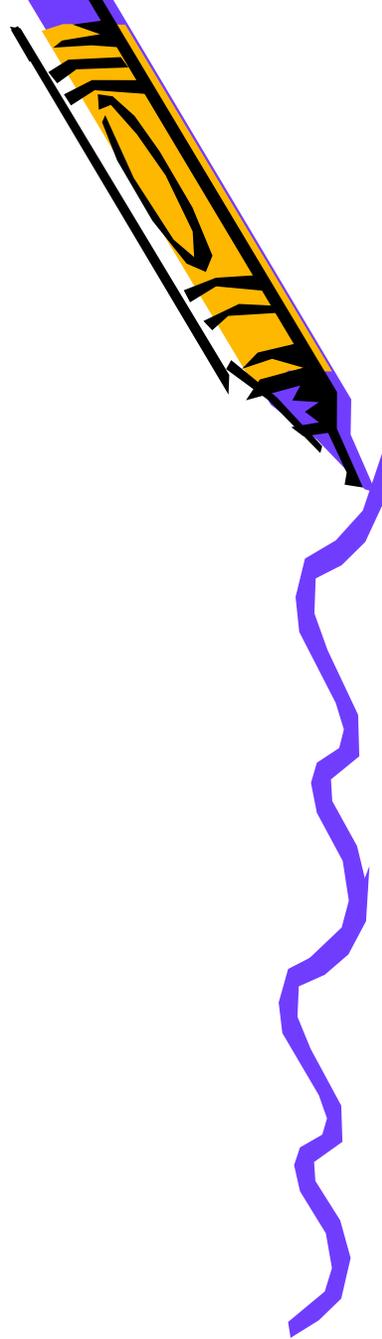


Who Are You?

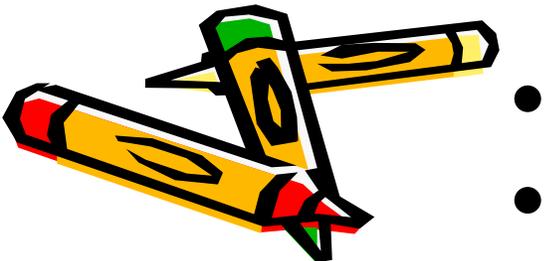




Who Are You?



- SA A D SD It is maddening when the court lets guilty criminals go free.**
- SA A D SD You love to listen people talk about themselves.**
- SA A D SD You are a fairly private person.**
- SA A D SD You have no big regrets about your past.**
- SA A D SD You like to talk a lot.**
- SA A D SD You are somewhat of a thrill seeker.**
- SA A D SD You like to be in the middle of large crowds.**
- SA A D SD Other people's feelings are their own business.**
- SA A D SD You have to give up on some things you start.**
- SA A D SD You would rather not get involved in other people's problems.**





Who Are

You?

Now?

!



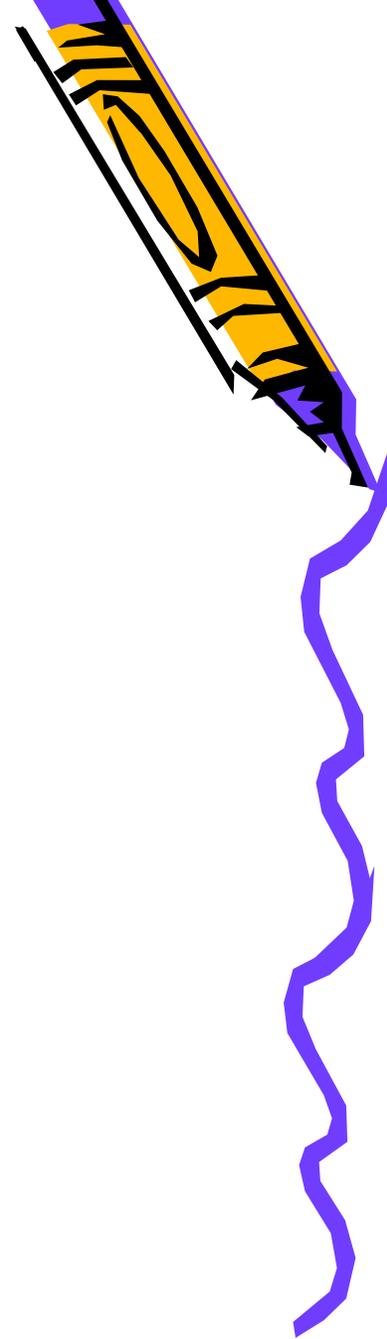
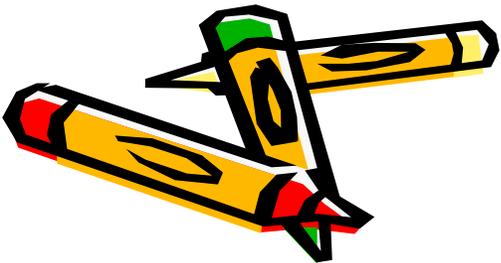
SA A D SD You know when people are in a bad mood, even if they don't show it.

SA A D SD You can wait patiently for a long time.

SA A D SD You are unsure of what to say when you meet someone.

SA A D SD You like to take frequent breaks when working on something difficult.

SA A D SD There are some people you really can't stand.



SELF ASSESSMENT

Job Retention Tools

Job Retention Skills

Yes No	When you have to attend an event, do you generally run a little late?	Yes No	Have you ever walked off a job without giving notice?
Yes No	If you asked to do something on a job that you do not perceive is your job, do you get upset?	Yes No	Have you had more than one job that lasted less than a year?
Yes No	Have you gotten angry enough at job to have a verbal fight with a co-worker or supervisor?	Yes No	Can you use all of your past employers as references?
Yes No	Do you need skills for how to handle conflict and other situations at work?	Yes No	Did you ever leave a job because of a conflict with a supervisor?
Yes No	Have you had an employee evaluation at work that was less than positive?	Yes No	Have you ever worked at a job where your hours were continually cut until you almost had no hours?
Yes No	Are there some jobs that you might not be able to do because of a conviction?	Yes No	Have you had any problems with punctuality or attendance at a job.
Yes No	When you get an employee handbook at work, do you read it right away?	Yes No	Have you had problems retaining a job?

Vocational Skills, Occupational Skills, Academics and Training		Challenges you might face to working at a job or going to school.	
Yes No	Can you navigate the internet and use a computer?	Yes No	Are you pregnant?
Yes No	Are you currently in training, high school, vocational school or working on your GED?	Yes No	Do you have reliable transportation?
Yes No	Do you have a high school diploma or GED?	Yes No	Do you have a valid driver's license?
Yes No	Do you have ever earned any licenses, certificates or degrees?	Yes No	Do you have a social security card?
Yes No	Are you interested in going to school of any type?	Yes No	Do you have any mental or physical issues that might prevent you from going to school or going to work?
Yes No	If yes, which type of school would you like to attend? GED/HS diploma College, Certificate Program	Yes No	Have you ever been arrested or convicted of a crime other than a traffic violation? If so, explain.
Yes No	Do you know what kind of job you are interested in doing? If so, _____	Yes No	Where do you live? Own house Rent Live with someone Homeless Live in Shelter Other
Yes No	Do you have skills that you have developed through a hobby or volunteer job?	Yes No	Do you have reliable child care?



Structured Interviewing

- Use open ended questions rather than closed to actively involve the participant in the process.
- Ask for their resources before you offer yours.

Example:

Do you have reliable childcare? Yes No. (Closed)

What kind of childcare do you have? (Open)

Do you have reliable transportation? (Closed)

What options do you have available for transportation if you went to school or got a job? (Open)

Asking Primarily “Yes” “No” Questions





Open Question Starters

CLOSED

Did you get along with your boss?

Tell me about your relationship with your boss.

What...

Why....

How...

Can you describe..

Tell me...

Can you say more about that?

What do you mean by _____ ?

I'd be interested in knowing....

I'm not certain I understand....

Can you give me an example?

What would you like to know about _____ ?

I'd like to help you find the best possible information. Can you tell me more about your interest?

Draft Structured Interview Questions

Job Search Tools	Draft Structured Interview Questions:
Job Interviewing	So when was the last time that you can remember having a face to face job interview? How did you feel about your interview skills? What did you think you could have done better?
Resume	Tell me about your resume and what parts of it that you think might need improvement.
Voicemail	When you think about the voice mail message that you use and you think about a business person or possible employer calling it, what impression do you think your voice mail message would give the caller?
References	Tell me who you would use for a job reference (how you know the person, how long you have known them, and what you think they would say).

Draft Structured Interview Questions

Job Retention/Work Habits	Draft Structured Interview Questions:
Punctuality	When you have an appointment at an office or are invited to an event, how would you characterize your punctuality? Generally would you be early, right on time or often running a little late? Talk about that.
Reasons for leaving	Think about the last three jobs you have held. Can you tell me the job and tell me what happened that made you leave those job?
Communication skills	Tell me about a time that you had a conflict on a job. Tell me what happened and how you handled it.
Attitude about self	What are your greatest strengths at a job and what are things you need to work on and improve?

Draft Structured Interview Questions

Occupational Skills, Licenses, Diplomas, Credentials, Academics	Draft Structured Interview Questions:
Occupational Skills	Tell me about your marketable skills. What things can you do and which of those things are you really good at?
Education	Give me a run down of all of your education starting with high school. Tell me what certificates, diplomas, licenses and such that you have earned that might help you to get a job.
Vocational programs	You indicate that you want to be (fill in occupation) and that you want to go to school. Can you talk a little bit about how you decided that (fill in occupation) was what you wanted to do.
Work Experience, Internships, Community Service	We have business and non-profit partners who accept people for work experience, internships and community service projects. These types of programs help people get some real world experience in a particular field. What might be some advantages to you of using these services?

Draft Structured Interview Questions

Plans for Outside Challenges (Housing, Legal, Family Management, Mental/Emotional, Physical Health)	Draft Structured Interview Questions:
Legal	Some occupations and professions prohibit individuals with certain criminal convictions from working in that field. Can you tell me about any legal issues that you have dealt with which could be a consideration for school or a job.
Financial Stability	In order to be able to go to school, you have to have some way to support yourself during that time. What ideas do you have about how you could live financially and you work toward increasing your skills?
Health considerations	So talk a little about your general health and how any health concerns could impact your ability to complete training or work at a job.
Family Support	What kind of assistance will your family or friends provide to help you get through the training?



Ask Permission before giving advice, providing information or expressing a concern.



- Would it be all right if
- I would like to share a concern with you if you are open to that.
- I am wondering if I could ask for a couple of minutes to provide you with some information that may be helpful to you.
- If you are okay with it, I would like to share some of the resources that have helped other clients I have worked with who have had similar dilemmas.
- I am really worried about something and I was hoping you would allow me to explain to you what I am worried about.
- I am going to need to spend a few minutes today on Would that be alright with you?



At first sign of resistance or disinterest, stop and engage the client in evaluating the information, advice or concern you shared.

“What part of that information, if any, applies to you? What is your immediate reaction?”

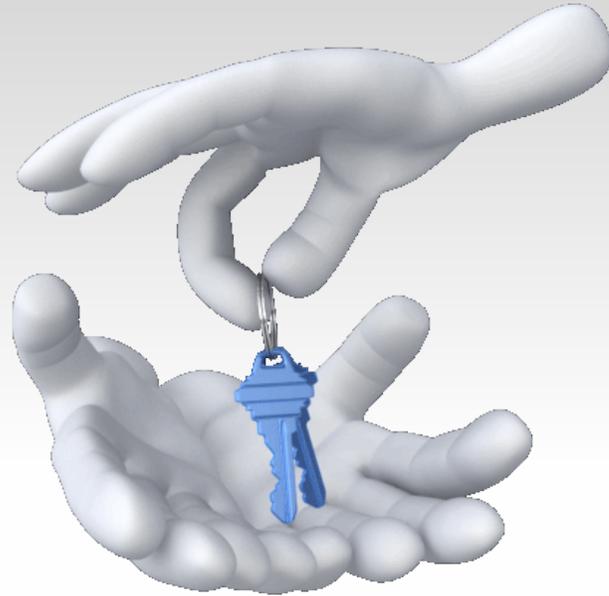
Career Plan to Move to “Competitive” Job Seeker and Job Retainer Status

Has Quality for Job Search Tools?



	Need	Assigned Activity/ Service	Responsible Party	Start Date	End Date
■	Clean Up Facebook	On Own	Client		
■	Create Professional Email Address	On Own	Client		
■	Develop Competitive Resume	One Stop Career Readiness Workshop	Client		
■	Answering message that is professional.	On Own/Career Readiness Workshop	Client CS Referral to Workshop		

Three Key Pieces of Information on Which to Build the Re-Engagement Argument



- **What service most interests me**
- **Life goals**
- **What I hate about my life right now**

Set Life Goals: All Motivation Begins with a Goal

66

- **It is useful to identify your goals and how you want your life to be once you are working. It will help you to stay motivated. Think and list five ways your life would be better if you had the higher level income you just calculated.**

- _____
- _____
- _____
- _____
- _____

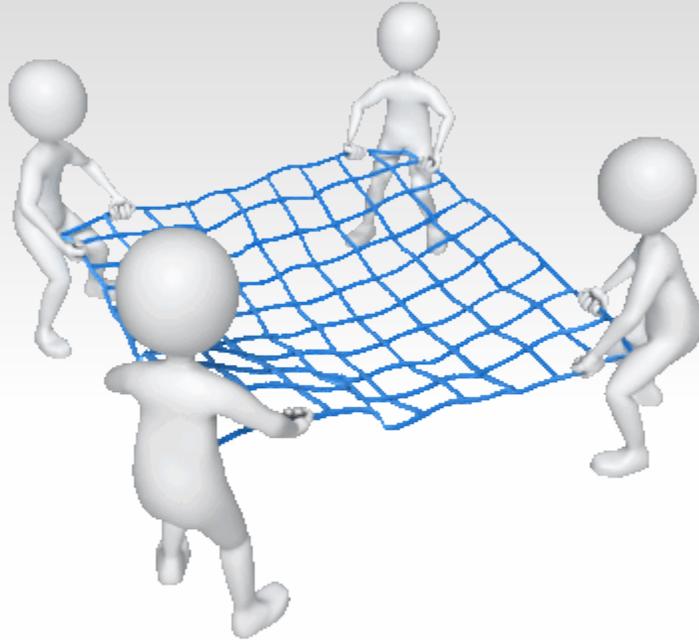


Staying on Track



Quicker You Catch: The Greater the Success

- **Decreasing Success as Time Goes On**



Poor Strategy to Re-Engage their interest!

Attended A Step and Stopped Coming

No reminder of goal.

Hello. This is Karen from the XYZ Program. I was calling to reschedule your orientation or intake appointment. You were scheduled for (x) and you missed that appointment. I would like to get you rescheduled.

Y

U

C

K

Much better script for re-engagement!

Attended a Step and Stopped Coming.

Reminder
of real
goal.

Hi Michelle. This is Ann from xxx Inc. A while back, when we met, you said you hoped to get training so you could get a better job to provide more for your daughter. I am wanting to work out a plan for you so you can get back on track. I know how important increased money was to you and your child.

I

D

E

A

A More General Version for Recontact

Accepts
part of
responsibility.

Hi Marco. This is Robert at xxx Inc. and I am trying to reach you. My goal was to help you to _____. We were working on a plan and then we lost our momentum. I wanted to call to find out what I can do to get us back on track. I really want to help you to _____. Give me a call back at xxx-xxxx. I would be excited to hear from you.

I D E A



Inclusion of the dream is critical during on-going case management to continue motivation and change.

“You are taking some important steps toward making a better life for your children.”

- You are in school, you are making good progress and only have 4 weeks left.
- I would like to talk about any steps you have taken since our last conversation and then to talk about what is next.



Writing Coaching Notes That Support the Plan

The Concept



Changing Horse Midstream



Have you ever???

Taken over someone else's case and had no idea where to start or what to do?



Three Types of Case Notes

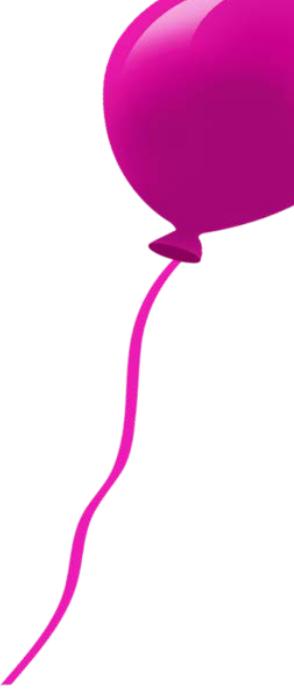
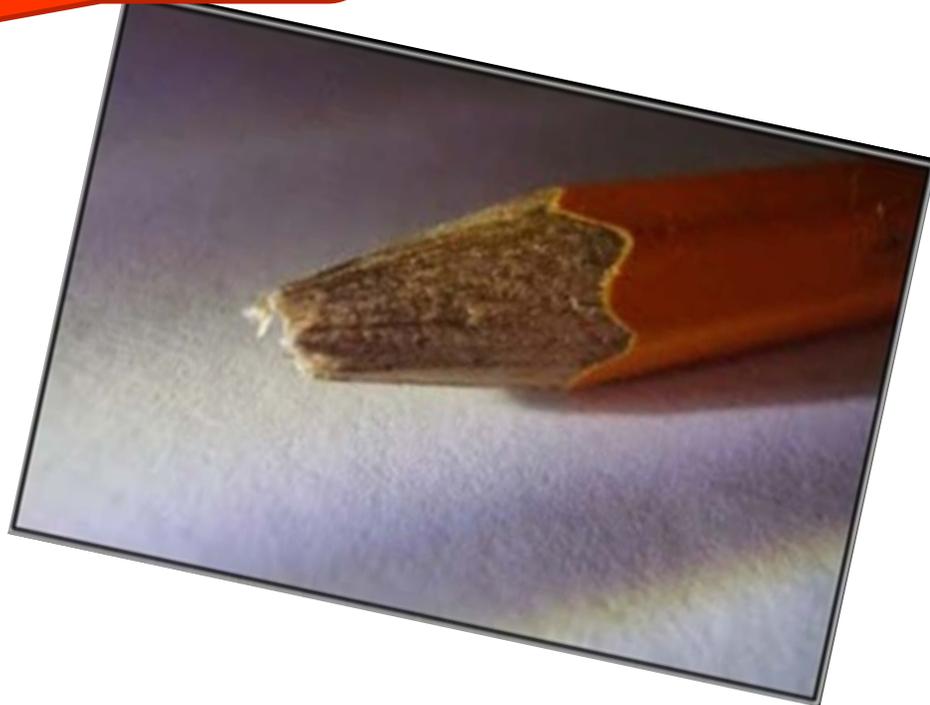
Dear Diary causes a domino of problems.



2/15/2014: Talked to Sue. She said things are going well. Son and family visited over the weekend and she had a nice time. All is well. She likes her work experience site and getting along well.



What's the plan?



I already told him all of this. Why am I doing this? What a waste of time.



I vaguely remember having this conversation before. I can't remember. I'm gonna have to wing it.



EEEEEEWWWHHAATT?!!



It's so easy to forget
with so many on my
caseload. What exactly
did we talk about?



Not sure we are
moving forward.
Is this worth it?

SQUARE ONE



Mr. Peters, in my opinion, is not yet ready to look for a job. He has several barriers (see IEP) that he needs to overcome before he is job ready. He was late again! I think he might have a drinking problem.

**My Opinions
Disguised as Facts.**

Motivation seems to be a problem for Selena. She just doesn't follow through.





Great! I can see that she was going to talk to co-workers and her boss about more hours. I know exactly what to talk about and I won't miss a beat.

Anyone can step in when a planning format is used.



Focus on Job, Retention and Earnings Increases.

- Tina agreed to tell her co-workers to call her if there is any day they can not work.
- She agreed to tell her supervisor that she would be willing to work if anyone calls off. She plans to do both this week.

If Plan A doesn't work, there are 25 other letters in the alphabet.

...
...
The really
... into

~~Plan A~~
Plan B.

Documenting via Case Notes



Dear Diary

(Reports a past event. Not planning related)

Opinion

(Should not be included in any case note. Not factual.)

Job Getting

(Planning related. Who is doing what by when.).

Writing Case Notes that Get Results



Type	Case Note
	<p>Lisa brought in pix of her baby. Says everything going well at the community service site. No complaints. She likes it okay and hopes this will help her to get a job.</p> <p>I agreed to review Stan's resume and provide feedback. I will email him comments by 09/15.</p>
	<p>Donna still doesn't know what job she wants to do. She dismisses anything she is qualified to do. And wants to do stuff she will never get.</p>
	<p>Marcy called me. She is depressed about being unemployed. She said she is looking but can't find anything.</p>
	<p>Emma agreed to review her Facebook page and delete all pictures that are unprofessional and review posts. It will be cleaned up by Monday 8/7.</p>
	<p>Vanessa says she is thinking about getting her GED. She said she knows she needs to get a diploma to be able to have more opportunity on a job.</p>
	<p>Joe agreed to go to attend job search workshop series and create a stronger resume, cover letter, and telephone script. He will attend the session beginning on September 13.</p>
	<p>Andrew's cell phone was stolen and he needs one for his job.</p>
	<p>Russ called to tell me that his car broke down so he didn't go to work yesterday. He did call his supervisor in advance.</p>
	<p>Carlos did not complete his financial aide agreement as promised. He never follows through.</p>

Writing Case Notes that Get Results



Type	Case Note
	Tom has completed his occupational skills training and has competitive tools for job search. I will set appointment for him with business services unit by Friday to begin creating a job search plan.
	Janet seems to be interested in applying to Express Medical. She knows it will be hard to get in. Completed child care application.
	Sarah recently had baby. Discussed the impact of baby on her plan to work. Sarah agreed to talk to her sister about being a back up babysitter. She will ask her tonight.
	Frieda agreed to take the Career Scope and then come to see me so we can discuss the results. The Career Scope is set up for Thursday afternoon.
	Patty doesn't assume responsibility for all the absences at the work experience site last week and now she has lost that position. The supervisor told her not to come back. Patty was angry at the supervisor and said she isn't ready to try to find another site.
	Talked to Dave at his work site. He called to get his gas voucher. Everything is status quo.
	Margaret was late again to work. The employer called and he is upset. I talked to Margaret. She seemed to be sorry. She said her alarm didn't go off.
	Doris who doesn't have a job – has a smart phone, an ipad and just got a dog. She doesn't have the money for those things but then wants up to pay for her gas.



“We have a plan. Baby Steps. I am moving ahead.”

Plans are mini-goals.
Meeting goals gives sense of achievement.
Getting a sense of achievement is motivational.