

Tips for Using Dr Ford's Case Management Manual

Dr Ford's "Making Case Management Work" workbook is designed for individual use rather than group use. For this reason, practice guides have been created for facilitators of local practice groups to provide ideas for integrating the workbook in group practice sessions.

Local districts have discovered that the chapters in the manual should not necessarily be covered from front to back. Here is one recommended sequence for the manual's use.

1. Role of the Case Manager: Start with Chapter 1 and define what case management is and who is responsible for what. Include Dr Ford's case management principles:

- ✓ Participant driven
- ✓ Strength based
- ✓ Shared partnership between case manager and participant
- ✓ Participant should be involved in all areas of planning
- ✓ Participants are responsible for the outcome
- ✓ Case managers are responsible for the process

Introduce Dr Ford's empowerment/helping/abandoning model and the Karpman triangle/healthy boundary model (see related practice guide). These models can be useful to refer to during skill practice and role play.

2. Counseling Skills: Once workers are clear about the case manager's role, spend a fair amount of time on Section 3: Counseling Skills (you can refer to the skills as "communication skills" because workers do not see themselves as counselors).

- ✓ Chapter 9: Asking open ended questions--This takes lots of practice.
- ✓ Chapter 8: Active listening--Workers are sometimes so busy figuring out how to ask open ended questions they aren't actually listening to the answers.
- ✓ Chapter 10: Confrontation--Workers are faced with this daily, e.g., "what if's," "yes buts," etc.
- ✓ Chapter 12: Summarizing
- ✓ Chapter 13: Problem Solving

Managing the interview can be a challenge in itself. Working on redirecting and maintaining focus in the interview will be ongoing.

3. **Assessment tool - 7823:** At the same time you practice the Counseling/Communication skills, use the 7823 to guide the conversation and identify motivators, strengths, challenges, and resources. For practice, fill out a “pretend” 7823 based on some real client experiences case managers have encountered.
4. **Assessment - Chapter 3:** The assessment is much easier if workers are comfortable with the counseling skills and the use of the 7823 assessment tool. It’s important to emphasize that assessment is ongoing. Every time a worker meets with the client, the assessment continues and builds on information previously gathered.
5. **Planning, arranging resources, and marketing the program** all go together.
 - Use role plays to practice having the client write her/his own plan.
 - Marketing includes offering choices. This is challenging because “not participating” is not an option. We explain that participation is required, but we offer a variety of choices to help participants become self sufficient. Marketing services may be a new skill for case managers so it is particularly important to model practicing these skills.
 - Create and use Ford friendly flyers about the local JOBS program opportunities where the language is not “agency” speak and activities sound interesting and fun.
 - Practicing marketing approaches can be included in assessment practice as well as role plays of other client contacts.
6. **The skills overlap and build on each other over time.** Initially, you may be doing practice and group role plays on specific topics such as listening for feelings or asking open questions. As you cover more skills, role plays may become broader in their scope and incorporate all of the skills. It’s OK to go back and work on previously practiced areas, as just spending a session on each chapter isn’t enough. Building skill levels takes repeated practice and integration over time.

If you have more tips to add, contact Cheré LeFore at CAF Training Services.