CASE MANAGEMENT SERIES: ENGAGEMENT AND ASSESSMENT

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The Florida Housing Coalition, Inc., is a nonprofit, statewide membership organization whose mission is to bring together housing advocates and resources so that all Floridians have a quality affordable home and suitable living environment.
Webinar Logistics

• Participants are muted
• Enter your questions in the box in your webinar panel
• Handouts are available with this webinar
• Forgot to ask a question or want to ask privately? Email me at rosado@flhousing.org
• This webinar is being recorded and will be available at www.flhousing.org
• A survey will immediately follow the webinar; please complete it! Thanks!
Quick Poll – Who Are You?

A. Case Manager/Support Services Staff
B. Frontline Staff
C. Supervisor/Executive Staff
D. Funder/Grant Administration
E. Other
Case Management
Must Haves
Must Haves

- Trauma Informed
- Housing Focused
- Recovery Oriented
- Person Centered
| **Trauma Informed** | Recognizes that individuals experiencing homelessness have a higher prevalence of trauma histories  
“What is wrong with you?” to “What happened to you?” |
|---------------------|---------------------------------------------------------------------------------------------------|
| **Recovery Oriented** | Recognizes the participant as the expert and their strengths are essential to their recovery  
Recovery looks different for everyone |
| **Housing Focused** | Stable housing is always the goal  
Housing First philosophy |
| **Person Centered** | Assessments are focused on strengths  
Offer choice in decisions (housing, treatment, programs) |
<table>
<thead>
<tr>
<th>Case Management Models</th>
<th>Description</th>
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<tbody>
<tr>
<td>Progressive Engagement</td>
<td>Minimal assistance in beginning. Increased only if necessary. Good model for RRH. Client does not “fail” out of services.</td>
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<tr>
<td>Critical Time Intervention</td>
<td>Usually used post-institutionalization or when intensive services are needed. Intensive services in the beginning; decreased as client becomes stable. Time limited (9 months).</td>
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<tr>
<td>Assertive Community Treatment</td>
<td>Reserved for people with the most serious mental illness; 24 hour coverage; provider of all services; most intense community CM available; can be used in PSH</td>
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<tr>
<td>Intensive Case Management</td>
<td>Usually associated with PSH or in the mental health system; intensive case management provides a high level of case management as long as is needed; coordinates all services for clients</td>
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Assertive Engagement
Discussion
Today: Voluntary Services

• Participant has the choice to engage or not
• No “participate or else”
• Voluntary for participant; not voluntary for staff
• Housing is not tied to participation in services
Why?

• Removes barriers to participants engaging
  • Missing appointments
  • Premature case closure
  • Power imbalances
• Really listens to participants’ goals and works to accommodate those
• Rapport, rapport, rapport!
How?

- Throw away “one size fits all” approach
- Meet participant where they are at
- Be authentic
- Be flexible
  - Where does the participant feel comfortable meeting?
  - Should walk in hours be available?
- Be transparent
  - What are you able to offer? What is not a part of your service scope?
- Be persistent
  - Can I come back next week?
  - Is there a better time for you?
  - Is there anything I can do for you?
Case Management is NOT

- Parenting
- Mentoring
- Fixing
Case Management IS

• Partnering
• Encouraging
• Solution-focused
Example – “Mary”

Challenges

• High utilizer with over 15 inpatient psychiatric admissions in the past 6 months
• Cycling through the system (jail, emergency room, psych hospital, shelters)
• In denial of substance abuse (alcohol, marijuana)
• Refusing housing options that have been recommended
• Misses appointments
• Recently evicted from PSH
• Argumentative with providers
• Banned from several social service providers
What Are Your Ideas?
Start with Strengths!
Example – “Mary”

Strengths

• Engaging with the mental health system on some level
• Receptive to outreach worker
• Potential for Supplemental Security Income/Social Security Disability Insurance Outreach, Access and Recovery (SOAR) candidate
• Fewer admissions when housing was stable in the past
• Responds well to peer support
Assessment
“Talk of problems and you create problems; talk of possibilities and you create possibilities.”

-Kerstin Mahlberg and Maud Sjoblom
Problems

Solutions
Solution-focused

- Not-knowing stance
  - We make no assumptions
- Everyone is doing the best they can
- Actively listening to responses
- Client is the expert
Assessments are Interventions

• Not just required paperwork – an opportunity to have a conversation

Simply, we are trying to find out:
• Why are they here? (Housing)
• What do they want?
• What are the solutions?
Motivational Interviewing
Open ended questions

• How can I help you with ___?
• Help me understand ___?
• How would you like things to be different?
• What are the good things about ___ and what are the less good things about it?
• What have you tried before to _____? (ex. help you stay housed, stay sober, drink less, keep appointments, consistently take medication?)
• What do you want to do next?
Utilize Motivational Interviewing - OARS

Affirmations

- I appreciate that you are willing to meet with me today.
- I know it took you a lot of time to get here on the bus. I really appreciate you taking that time.
- You are clearly a very resourceful person.
- You handled yourself really well in that situation.
- That’s a good suggestion, great idea, etc.
- If I were in your shoes, I don’t know if I could have managed nearly so well.
- I’ve enjoyed talking with you today.
Utilize Motivational Interviewing - OARS

Reflective Listening

- **Repeating or rephrasing**: Listener repeats or substitutes synonyms or phrases, and stays close to what the speaker has said.
  - It sounds like you didn’t like that program very much.

- **Paraphrasing**: Listener makes a restatement in which the speaker’s meaning is inferred.
  - It seems like no one is really listening to what you’re saying you need help with.

- **Reflection of feeling**: Listener emphasizes emotional aspects of communication through feeling statements. This is the deepest form of listening.
  - So you feel a bit hopeless and discouraged.
Utilize Motivational Interviewing - OARS

**Summarize**

- Let me see if I understand so far…
- Here is what I’ve heard. Tell me if I’ve missed anything.
- (If there’s ambivalence) “On the one hand…, on the other hand…”
“If your services are meaningful to participants’ goals, they will choose engagement.”

Staff Observation from the HomeFree rapid re-housing program in Portland, OR
Case Management Series

- 3/1/2018 - Introduction to Working with Special Populations
- 3/15/2018 - A Trauma-Informed Approach
- 4/5/2018 - How to Work with Difficult Cases
- 4/26/2018 - Self-Care for Human Service Workers