

StaffSkills

Case Management/Coaching Series

Module One

StaffSkills Schedule

Note: There is a 15 minute morning and afternoon break each day.

Day One 9:00 a.m. - 3:30 p.m.

9:00 - 11:30	Introduction/Welcome Module 1: Principles and Practice
11:30 - 12:15	Module 2: Customer Assessment (begins)
12:15 - 1:00	Lunch
1:00 - 3:15	Module 2: Customer Assessment (continued)
3:15 - 3:30	Evaluation

StaffSkills Schedule

Note: There is a 15 minute morning and afternoon break each day.

Day Two 9:00 a.m. - 3:30 p.m.

9:00 - 9:30 Application of Training Information

9:30 - 12:15 Module 3: Developing Plans

12:15 - 1:00 Lunch

1:00 - 3:15 Module 4: Arranging and Referring

3:15 - 3:30 Evaluation

StaffSkills Schedule

Note: There is a 15 minute morning and afternoon break each day.

Day Three 9:00 a.m. - 3:30 p.m.

9:00 - 9:30	Application of Training Information
9:30 - 12:00	Module 5: Using Case Consultation and Support
12:00 - 12:45	Lunch
12:45 - 2:30	Module 6: Recording Information
2:30 - 3:30	Final Wrap Up, Evaluation, and Certificates

StaffSkills Definitions

Case Management

StaffSkills Definitions

Case Management

→ Case management is both a process and a functional area.

StaffSkills Definitions

Case Management

- Case management is both a process and a functional area.

➔ It's a partnership between staff and customer.

StaffSkills Definitions

Case Management

- Case management is both a process and a functional area.
- It's a partnership between staff and customer.

➔ Together a staff person and a customer design and coordinate a program of services.

StaffSkills Definitions

Case Management

- Case management is both a process and a functional area.
- It's a partnership between staff and customer.
- Together a staff person and a customer design and coordinate a program of services.

➔ Both staff person and customer have responsibilities.

StaffSkills Definitions

Case Management

- Case management is both a process and a functional area.
- It's a partnership between staff and customer.
- Together a staff person and a customer design and coordinate a program of services.
- Both staff person and customer have responsibilities.

➔ Goals are to move a person into satisfactory employment and to link them to career center system components.

StaffSkills Definitions

Case Management

- Case management is both a process and a functional area.
- It's a partnership between staff and customer.
- Together a staff person and a customer design and coordinate a program of services.
- Both staff person and customer have responsibilities.
- Goals are to move a person into satisfactory employment and to link them to career center system components.

➔ Case management includes managing and supporting a group of individuals as they progress through services.

StaffSkills Definitions

Coaching

StaffSkills Definitions

Coaching:

**Providing assistance to an individual
in order to solve a problem or do something better
through direct discussion and guided activity**

Key Principles for Staff

Key Principles for Staff

➔ **All activities are intended to help a customer continue to move forward toward employment.**

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.

 **Assessment is an ongoing process.**

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
- Assessment is an ongoing process.

➔ Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
- Assessment is an ongoing process.
- Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.

➔ Customers deserve accurate information in ways they can hear.

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
 - Assessment is an ongoing process.
 - Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.
 - Customers deserve accurate information in ways they can hear.
- ➔ **Develop, understand, and maintain a network of support and service providers.**

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
- Assessment is an ongoing process.
- Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.
- Customers deserve accurate information in ways they can hear.
- Develop, understand, and maintain a network of support and service providers.

➔ **Be clear about your role, the Center's purpose, and your expectations.**

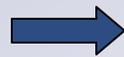
Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
- Assessment is an ongoing process.
- Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.
- Customers deserve accurate information in ways they can hear.
- Develop, understand, and maintain a network of support and service providers.
- Be clear about your role, the Center's purpose, and your expectations.

 **Keep accurate, up-to-date records.**

Key Principles for Staff

- All activities are intended to help a customer continue to move forward toward employment.
- Assessment is an ongoing process.
- Your primary assessment tool is the capacity to actively listen, observe, and organize relevant information.
- Customers deserve accurate information in ways they can hear.
- Develop, understand, and maintain a network of support and service providers.
- Be clear about your role, the Center's purpose, and your expectations.
- Keep accurate, up-to-date records.

 **Do not promise services that you or the center cannot provide.**

Ethical Considerations

Ethical Considerations

➔ **Be honest, direct, and professional with customers.**

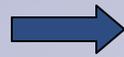
Ethical Considerations

- Be honest, direct, and professional with customers.

 **The relationship is a partnership based on trust, honesty, and mutual respect.**

Ethical Considerations

- Be honest, direct, and professional with customers.
- The relationship is a partnership based on trust, honesty, and mutual respect.

 **Recognize the extent of your experience, provide only services and use techniques or tools for which you are qualified**

Ethical Considerations

- Be honest, direct, and professional with customers.
- The relationship is a partnership based on trust, honesty, and mutual respect.
- Recognize the extent of your experience, provide only services and use techniques or tools for which you are qualified .

➔ The primary purpose is to be of service to the customer.

Ethical Considerations

- Be honest, direct, and professional with customers.
- The relationship is a partnership based on trust, honesty, and mutual respect.
- Recognize the extent of your experience, provide only services and use techniques or tools for which you are qualified .
- The primary purpose is to be of service to the customer.

 **Personal gain, bias, and discrimination have no place.**

Ethical Considerations

- Be honest, direct, and professional with customers.
- The relationship is a partnership based on trust, honesty, and mutual respect.
- Recognize the extent of your experience, provide only services and use techniques or tools for which you are qualified .
- The primary purpose is to be of service to the customer.
- Personal gain, bias, and discrimination have no place.

➔ Improve services through continued development, customer feedback, and partner consultation.

Ethical Considerations

- Be honest, direct, and professional with customers.
- The relationship is a partnership based on trust, honesty, and mutual respect.
- Recognize the extent of your experience, provide only services and use techniques or tools for which you are qualified .
- The primary purpose is to be of service to the customer.
- Personal gain, bias, and discrimination have no place.
- Improve services through continued development, customer feedback, and partner consultation.

➔ Honor a customer's right to privacy and confidentiality.

Staff Should Expect:

Staff Should Expect:

➔ **To know in advance what they can and cannot promise customers.**

Staff Should Expect:

- To know in advance what they can and cannot promise customers.

➔ **Current center and other relevant policy which shapes their work.**

Staff Should Expect:

- To know in advance what they can and cannot promise customers.
- Current center and other relevant policy which shapes their work.

➡ **Access to consultation, support, and information to do their job.**

Staff Should Expect:

- To know in advance what they can and cannot promise customers.
- Current center and other relevant policy which shapes their work.
- Access to consultation, support, and information to do their job.

➔ **A safe, professional environment to perform duties.**

Staff Should Expect:

- To know in advance what they can and cannot promise customers.
 - Current center and other relevant policy which shapes their work.
 - Access to consultation, support, and information to do their job.
 - A safe, professional environment to perform duties.
- ➔ **To be treated with respect and not be subjected to verbal abuse, intimidation, or fear of physical violence.**

Initial Meeting Worksheet

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Content:

➡ **Briefly explain your role and the purpose of this meeting**

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Content:

- Briefly explain your role and the purpose of this meeting

 **Begin to determine what the customer is looking for (why they came in today)**

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Content:

- Briefly explain your role and the purpose of this meeting
- Begin to determine what the customer is looking for (why they came in today)

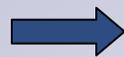
➔ Clarify expectations regarding the center, services, and the customer's part

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Content:

- Briefly explain your role and the purpose of this meeting
- Begin to determine what the customer is looking for (why they came in, today)
- Clarify expectations regarding the center, services, and the customer's part

 **Ask if there are any questions**

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Process:

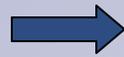
➔ **Help customer feel welcomed and listened to**

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Process:

- Help customer feel welcomed and listened to

 **Establish a positive tone for a working relationship**

Initial Meeting Worksheet

There are several process and content goals you will want to address.

Process:

- Help customer feel welcomed and listened to
- Establish a positive tone for a working relationship

 **Demonstrate efficacy**

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

➔ Help a person identify what they want to achieve

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

- Help a person identify what they want to achieve

➔ Help them formulate a plan that includes sequenced activities

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

- Help a person identify what they want to achieve
- Help them formulate a plan that includes sequenced activities

➔ Support them in carrying out (operationalize) the plan

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

- Help a person identify what they want to achieve
- Help them formulate a plan that includes sequenced activities
- Support them in carrying out (operationalize) the plan

➔ Provide the opportunities to apply, practice, and improve skills

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

- Help a person identify what they want to achieve
- Help them formulate a plan that includes sequenced activities
- Support them in carrying out (operationalize) the plan
- Provide the opportunities to apply, practice, and improve skills

➔ Focus people and get them moving by working on action items

Coaching

“Coaching is . . . providing assistance to an individual to solve a problem or do something better, through direct discussion and guided activity.”

- Help a person identify what they want to achieve
- Help them formulate a plan that includes sequenced activities
- Support them in carrying out (operationalize) the plan
- Provide the opportunities to apply, practice, and improve skills
- Focus people and get them moving by working on action items

➔ Supporting achievement of different and increasingly demanding goals.

Coach/Customer Cycle of Learning

