Evidence-Based
”Remote” Case Management Approaches

Presented by: June Fisher, LSW
In Conjunction with the
Bureau of Early Intervention Services and Family Supports through Early Intervention Technical Assistance

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Thank You
Breathe and Believe

Be not afraid of growing slowly,
be afraid only of standing still.
**Program Goals, Objectives and Tasks**

**Goal:** To utilize knowledge and skills to engage individuals, families and communities in the planning process.

**Objective:** Know how to engage consumers and professionals to develop a consumer focused collaborative service plan

**Tasks:** Self-Care, Review information & Practice skills by developing a individual service plan

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**Skill: Set your intentions**

- **KNOWLEDGE:** Stanford Study: A Positive Attitude Literally Makes Your Brain Work Better
  - Your outlook on learning, it turns out, matters just as much as your IQ.

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“If you’re feeling self-conscious or overstimulated, turn off your camera and save your energy for when you absolutely want to perceive the few non-verbal cues that do come through.”

Understanding Our Brains

<table>
<thead>
<tr>
<th>Positive Vision</th>
<th>Negative Vision</th>
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</thead>
<tbody>
<tr>
<td>Brain healing response system activated</td>
<td>Brain stress response system activated</td>
</tr>
<tr>
<td>Connecting with others system activated</td>
<td>Defensive response system activated</td>
</tr>
<tr>
<td>Vision of positive outcome</td>
<td>Vision of a negative outcome</td>
</tr>
<tr>
<td>Long-term (+) positive impact</td>
<td>Long-term (-) negative impact</td>
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</table>

Have you ever worked with a difficult/resistant consumer & YOU WERE ABLE TO guide them through the behavior change process so they could improve their knowledge and skills (behavior)?

Skill: Begin From a Position of Confidence & Strengths

- You have the skills! Prior to the interaction, identify the skills you POSSES and WILL need to use
- One must have CONFIDENCE to stay in the “thinking brain”
- ACTIVITY: List and share 3 skills you have used to “engage a challenging staff”?  

Starting with strengths
Self-care
Tuning In To Self
Teaching self-care
Tuning In To Others
Using solution focused questions Focused Listening
Consistent supervisions
Developing Plans
Teaching organization
Acknowledging progress
Follow-up
Demand for work
Organization
Managing body language
And so many more...
What Can We Make a person Do against their will?

• NOTHING except forced incarceration or placement in a psychiatric hospital the rest is free will.

• It is your choice to be here today, I can only guide the process, it is up to you what you take away.

• I can guarantee, if you are able to stay present, you will fine tune existing skills and perhaps even learn a new skill/technique or two.

Guidelines for on-line learning and sharing

Source: https://extension2.missouri.edu/cm150
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Guidelines
On-Line Learning & Sharing

• Remain present
• All questions are GREAT QUESTIONS
• Muted participants please raise your hand
• Utilize the RESOURCES
• We are on a journey with the ongoing destination of CQI (continuing quality improvement)

IT IS OUR JOB TO MANAGE OUR BRAIN SO WE MAY EFFECTIVELY ENGAGE, GUIDE AND LEARN FROM THEIR BRAIN

Skill: Creating Safety
Knowledge: Our Brain is Designed to Respond to DANGER and REWARD Signals

Tune-In To Self
Preparing for an Interaction

1. Breathe and believe with confidence
   • As needed, mini break
2. Check equipment – head sets help
3. Check confidentiality – your family – pets OK
4. Check structure so you can focus
5. Have an agenda (provided ahead of time?)
6. Follow your guidelines – consistency is needed
7. Breathe and believe!! And do it AGAIN
Take a Moment…Step Back… NOTICE
We Have Been Demonstrating Our Strengths

KNOWLEDGE: Mirror Neurons
• Important discovery in the last decade of neuroscience.
• Designed to respond to actions that we observe in others.
• Responsible for myriad of other sophisticated human behavior and thought processes.
• Defects in the mirror neuron system are being linked to disorders like autism.

Source: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3510904/
"Essentially, mirror neurons respond to actions that we observe in others. The interesting part is that mirror neurons fire in the same way when we actually recreate that action ourselves."
Source: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3510904/

Communication and Relationship Building
its ALSO about the NON-VERBAL SKILLS

• Body posture, stance, and proximity to the listener
• Dress and appearance
• Gestures and facial expressions
• Pitch
• Cadence and Speed of words
• Tone and volume of voice
• Eye movements and contact

Video: https://www.youtube.com/watch?v=KCIWmsDuf8

Poll
What’s Working

- Daily check-ins
- Not checking-in
- Video conferencing with colleagues, individuals and families
- Group video calls
- Group conference calls
- Providing in-home services
- Providing remote services
- Remote team meeting
- Providing a hybrid of services safely
Introductions
Still the Same and Unique

7 minutes in rooms

- Name, role, agency
- Strengths we have transferred to our hybrid model of professional services
- Strengths we have used to motivate ourselves and colleagues

When you feel stuck or get off track from your destination: apply *It Works ©*

1. Wonder
2. Observe
3. Respect
4. Knowledge
5. Skills

*It Works ©*
Method for Successful interventions

<table>
<thead>
<tr>
<th>Social Service Professional</th>
<th>Neurosurgeon</th>
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</thead>
<tbody>
<tr>
<td>Wonder</td>
<td>Wonder</td>
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<tr>
<td>Observe</td>
<td>Observe</td>
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<tr>
<td>Respect</td>
<td>Respect</td>
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<tr>
<td>Knowledge</td>
<td>Knowledge</td>
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<tr>
<td>Skills</td>
<td>Skills</td>
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</table>
Wonder
What does it mean to individuals, families and groups/communities to engage in the change process?

Wonder
- What has been your personal successes and challenges with the change process?
  - Successes
  - Challenges

Observe
How you, the consumer and the team is responding to the change process.
- What do you observe when the process is moving towards achieving outcomes?
- What do you observe when the process is stalled?
Respect

- The process!
- What actions do you take when a consumer is having trouble with the change process?
- What challenges do you experience re: tuning in to their story?

Knowledge: Of Individuals, families and groups response to change and how to establish appropriate goals, objectives and tasks.

Knowledge

Vividly describing your goals in written form is strongly associated with goal success
- Describe or picture goals = more likely to be successfully

- Writing things down happens on two levels:
  1. External storage: Review at any time
  2. Encoding: Writing things down sends it to the hippocampus and long-term storage.

Skill: Developing a consumer centered plan through collaboration, negotiation and teaming.

Skill: Tune in to self, Cleanse to Be present & USING your thinking BRAIN

- [https://www.youtube.com/watch?v=K-aAOLM5oSY](https://www.youtube.com/watch?v=K-aAOLM5oSY)

- KNOWLEDGE: Vicarious trauma is an occupational challenge for people working in social services due to their continuous exposure to victims of trauma and violence.

  ACTIVITY

- Signs that you or staff are impacted by vicarious trauma
- Things I can do to manage my exposure to consumer’s and colleagues trauma
- Things I can do for my staff to assist them as they manage their exposure to consumer’s and colleagues trauma:

My Individual Plan1 skill I would like to improve in next 30 days

Goal – quality professional

Motivation - effectively guiding others – a job

Readiness for Change - 6 stages

Review Plan – weekly for success
Objective

Specific positive behavior change needed to achieve goal:

Example: strengths-based and solutions-focused questions in every interaction.

Method of Measuring Change:

Example: at the end of each interview I will consciously review my use of strengths-based and solutions-focused questions.

Tasks
To achieve the change I need to take actions and receive support

<table>
<thead>
<tr>
<th>Who</th>
<th>What</th>
<th>When</th>
<th>Duration</th>
<th>Review</th>
<th>Outcome</th>
</tr>
</thead>
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<td></td>
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</table>
Contrasting Types of Questions

**Problem Questions**
- What is the worst this problem has been?
- What is going on during those bad times?
- Can you think of anything you are doing to cause this?
- Have you thought about getting treatment for this problem?

**Strengths Questions**
- Tell me about the times when this situation was/is a little bit better?
- What made it better?
- What are you doing differently during those times when things are a little bit better?
- What would your best friend (mother, child, etc.) tell you when things are going a little bit better for you?

Discharge Planning: How do we know when the desired outcome is achieved?

“The process by which the patient is assisted to develop a plan of care for ongoing maintenance and improvement of health care, even after he or she may be discharged from the acute care hospital. Sometimes referred to as continuity of care, discharge planning seeks to provide services that will enable the patient to become as independent as possible”. Source: Felong (2008)

Critical Tasks to Prevent “Relapse” and Sustainability

The client is an integral part of the entire intervention process
- A discharge plan begins at the start of services
- Clear open assessment discussion: needs, progress, success and challenges
- Focus on “the plan”
- On-going progress reviews
- Connections to community informal and formal community
- Development of a concrete “relapse Plan"
Our #1 priority is creating safety then we can attend to content.

Our Brain Was Designed to Observe and Respond

Virtual interactions can be hard on the brain:
- Conversational nuances
- Safety and empathy
- Protection

The Brain MUST have a sense of calm to take in and retain accurate information

Skill: Creating Safety: Our Brain is Designed to Respond to DANGER and REWARD Signals
Parallel Process Leadership

https://insights.som.yale.edu/insights/do-teams-need-leaders


(c) Dynamic Training Solutions - It WORKS (tm)

More Tips

* “Walking meetings are known to improve creativity, and probably reduce stress as well”

(c) Dynamic Training Solutions - It WORKS (tm)

What Do These Pictures Say
We need to know
Where to Start?
What's Next?
We Have Strengths &
When? When? When?

Pro
We have the KNOWLEDGE & SKILLS

Challenge
Continuing in a Fluid Hybrid Model

Pro
We can still connect

Con
We may lose observing body language

RESPONSE
➢ Know that your tone and facial expressions create the environment
➢ Check-in via audio as soon as any level of confusion/conflict arises via email/text
### Pro vs. Con

<table>
<thead>
<tr>
<th>Pro</th>
<th>Con</th>
</tr>
</thead>
<tbody>
<tr>
<td>We can still connect</td>
<td>It’s different then we have done it before – or is it?</td>
</tr>
</tbody>
</table>

### RESPONSE

- Identify and embrace our past successes (phone, email, texting, intra-agency groups, social media, resource sharing)
- Have a schedule and follow it – structure and consistency are still achievable
- Follow agency scheduling protocols and ask each team member if they want it increased
- Start with a morning briefing or “stand up”
- Consult with many and learn each day

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### Review: Do’s and Don’ts of Services During Our Emotional Times

<table>
<thead>
<tr>
<th>Do’s: Your Team’s Pathway to SUCCESS</th>
<th>Don’ts That Could Negatively Impact Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue to Lead</td>
<td>Think even the people are OK on their own</td>
</tr>
<tr>
<td>Do all you can to manage confidentiality</td>
<td>Think: It’s all ok, no one wants to listen to us</td>
</tr>
<tr>
<td>If needed, immediately move from email and texting to audio/video communications</td>
<td>Think people can read between the lines</td>
</tr>
<tr>
<td>Set clear boundaries for you and the team</td>
<td>Stay connected 24/7</td>
</tr>
<tr>
<td>Start with a check-in</td>
<td>Get right down to business as usual</td>
</tr>
<tr>
<td>Attempt to create healthy work space</td>
<td>Work from here, there and everywhere</td>
</tr>
<tr>
<td>Provide EMERGENCY PROTOCOLS</td>
<td>Think they know what to do in all situations</td>
</tr>
<tr>
<td>Facilitate Team Communications</td>
<td>Isolate yourself or your team</td>
</tr>
<tr>
<td>Daily/Weekly Check-ins</td>
<td></td>
</tr>
<tr>
<td>Reach out for your OWN SUPPORT</td>
<td>Try to do it ALL ON YOUR OWN</td>
</tr>
</tbody>
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### Resources
Our Current State is Fluid and Changing

- Minimal daily/weekly check-ins with your team, leadership, and human resources/legal department
- Recognize staff experiences can be very different day to day
- We are managing our changing situation; we guide them to managing their changing situation and the world is doing its best to manage this changing situation.

ONGOING SUCCESSES

We CAN and WILL Guide Self-Care
When the power of LOVE overcomes the love of power the world will know peace
– Jimi Hendrix

References & More Resources

• Dorlee. Parallel Process, Boundaries and Authenticity
• Hackman, Richard. Do Teams Need Leaders?
• Ross, Danielle. Key Tips to Address technology frustration within your organization
• Sklar, Julia. ‘Zoom fatigue’ is taxing the brain. Here’s why that happens. National Geographic

More RESOURCES

https://ncwwi.org/index.php/resourcemenu/virtual‐workforce‐supports
https://www.redlands.edu/study/schools‐and‐centers/cape/telehealth/
https://ncwwi.org/files/---Documents/Supporting_the_Virtual_Workforce_Supervision_April_2020.pdf

KNOWLEDGE: Stages of Change

➤ Stage 1: Precontemplation
➤ Stage 2: Contemplation
➤ Stage 3: Determination
➤ Stage 4: Action
➤ Stage 5: Maintenance
➤ Stage 6: Relapse

(Prochaska, J.O., and DiClemente, C.C., 1984)