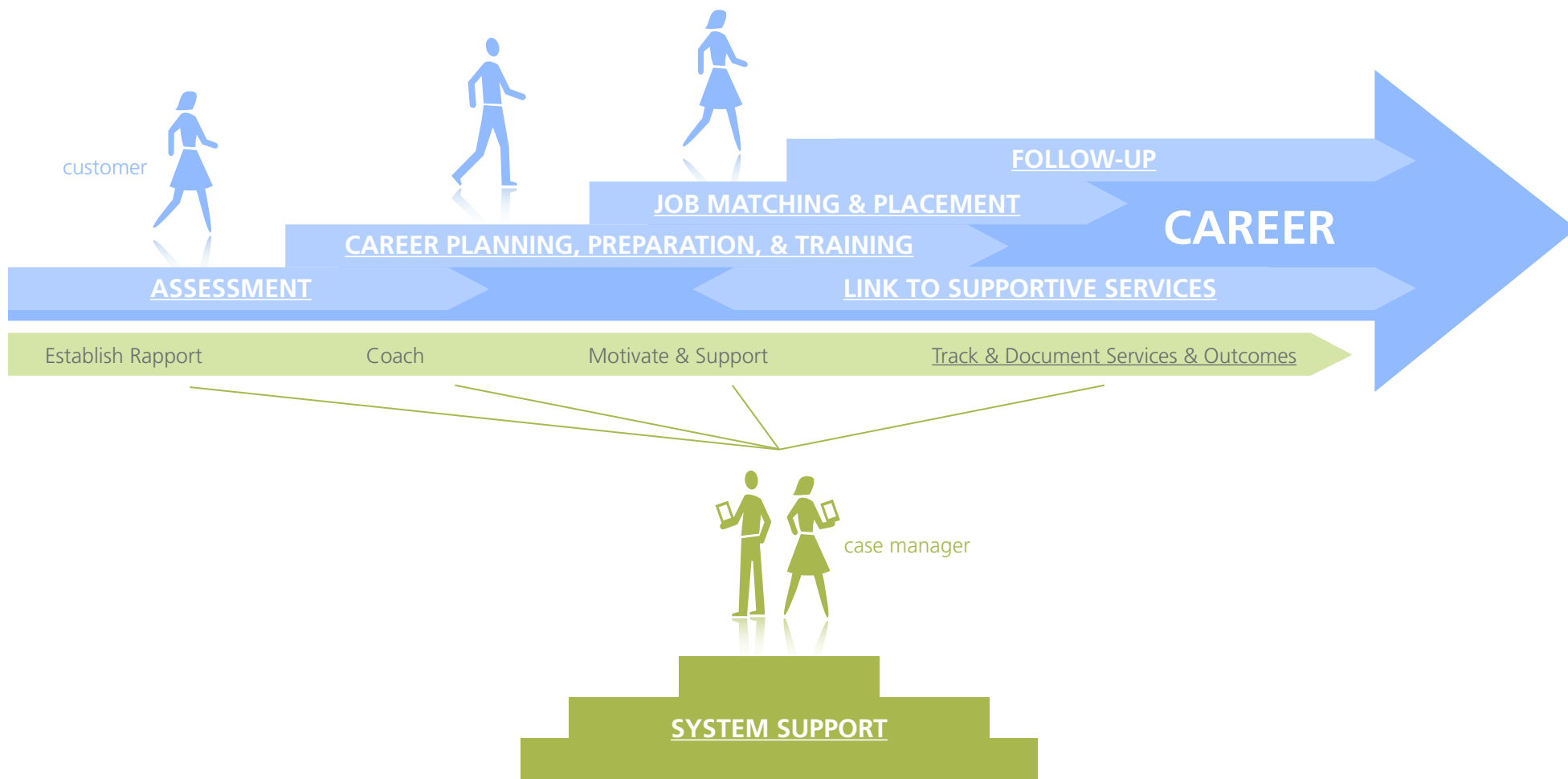


A Model of Case Management Effectiveness



EFFECTIVE CASE MANAGEMENT RESOURCES

Key Case Manager Activities

Assessment

[Assessment: Foundation for Effective Case Management Webinar](#) Beth Lengel presents at this webinar, a part of a case management webinar series, developed by the Maryland Institute for Workforce Excellence for DOL ETA Region 2. It outlines the basics of assessment; formal and informal assessment tools; use of interview and observation skills as key assessment components; current assessment trends in relation to transferable work skills, non-traditional skills for women, "greening-up" the process; and continuous follow-up. Available on Workforce3One.org (requires registration). May 2010.

[The Participant Assessment Process: Strategies for Obtaining and Using Essential Information](#) The Charter Oak Group presented this information at the Senior Community Service Employment Program (SCSEP) Forum, explaining the difference between an assessment and an IEP. The PowerPoint outlines the steps to a successful assessment process. It describes an ongoing process that must be updated at least every six months. Assessments provide information on interest, skills, education/training, work experience, and real and perceived barriers to employment.

[Testing and Assessment: A Guide to Good Practices for Workforce Investment Professionals](#) This guide presents information for workforce professionals to use when assessing their clients. It includes chapters on career counseling, training, and development; legal context of assessment; test quality; assessment tools and uses; test selection; test administration; scoring and interpreting assessment instruments; issues and concerns; and 13 principles of assessment. U.S. Department of Labor. Employment and Training Administration, 2006.

[Career Development Toolkit Series](#) This toolkit series comprises five career development tools kits, which include: (1) Helping Clients Assess and Improve Their Own Work Readiness; (2) Helping Clients Identify a Career Path; (3) Helping Clients Get the Job; (4) Helping Clients Keep the Job and Advance; and (5) Helping Clients Transition to Higher Education. These toolkits reflect the Maryland Career Development Framework. Maryland State Department of Education's (MSDE) Division of Career Technology and Adult Learning (DCTAL). October 2006.

Career Planning, Preparation, & Training

[The IEP as a Case Management Tool Webinar](#) Frank Lengel presents the basics of IEPs, power-planning, career planning, and successful IEP components in this webinar. Part of a case management webinar series, developed by the Maryland Institute for Workforce Excellence for DOL ETA Region 2. Available on Workforce3One.org (requires registration). May 2010.

[How to write an effective Individual Employment Plan](#) Funded by the Senior Community Service Employment Program (SCSEP) and the National Council on the Aging, this document describes the reasons for completing an Individual Employment Plan. It then discusses the dos and don'ts of preparation, writing, and follow-up. July 2005.

[Individual Employment Planning: The Key Tool of a Successful Program](#) This PowerPoint presentation describes the components of an individual employment plan. It provides steps to writing an IEP, including examples and resources. This presentation includes a section on the use of labor market information to inform IEPs. The Charter Oak Group presented this information at the Senior Community Service Employment Program (SCSEP) Forum.

[COWIB Policy on Assessment and IEP's](#) Central Oklahoma Workforce Investment Board's (COWIB) policy document to establish local assessment and individual employment plan (IEP) policy for participants enrolled in Adult and Dislocated Worker training under WIA Title I. This document provides definitions, descriptions, and tools for case workers to develop and utilize IEPs and assessments. December 2005. Pages 1-12.

[Improving Demand Driven Services and Performance: Toolkit for Effective Front-line Services to Youth](#) This toolkit includes a manual, training guide, and training modules for youth program case management. A section of this toolkit presents information and templates on Individual Service Strategies (ISS) for youth. Each youth participant must have a complete and up to date ISS to participate in many youth workforce programs (e.g., WIA Youth). Available on Workforce3One.org (requires registration). Spring 2007. Pages 194-210.

Link to Supportive Services

[The Road to Opportunity](#) This United Way of Massachusetts Bay report offers best practices in basic education, supportive services, case management, labor market analysis, vocational skills, incumbent workers, and follow-up services. Available on Workforce3One.org (requires registration). 2007. Pages 15-17.

[Bridging the Gaps in Washington A Research Brief of Findings and Policy Recommendations for Work Supports that Work](#) This report discusses the policy issues associated with connecting job seekers to work supports. Seattle Jobs Initiative, January 2008.

[Ready4Reentry: Prisoner Reentry Toolkit for Faith-Based and Community Organizations](#) This toolkit from US Department of Labor, Center for Faith-Based and Community Initiatives serves as a guide for faith-based and community organizations in developing reentry services for ex-offenders. This guide offers examples and sample worksheets on crafting intensive case management and referrals to supportive services. 2007. Pages 49-51.

[Charting a Path: An Exploration of the Statewide Career Pathway Efforts in Arkansas, Kentucky, Oregon, Washington, and Wisconsin](#) This report includes a chapter on how to incorporate supportive services into a career pathways model. It includes examples from Arkansas, Kentucky, Oregon, Washington, and Wisconsin. Seattle Jobs Initiative, June 2009. Pages 23-29.

Job Matching and Placement.

[Career Development Toolkit Series](#) This toolkit series comprises five career development tools kits, which include: (1) Helping Clients Assess and Improve Their Own Work Readiness; (2) Helping Clients Identify a Career Path; (3) Helping Clients Get the Job; (4) Helping Clients Keep the Job and Advance; and (5) Helping Clients Transition to Higher Education. These toolkits reflect the Maryland Career Development Framework. Maryland State Department of Education's (MSDE) Division of Career Technology and Adult Learning (DCTAL). October 2006.

[Career Coaching Design Template](#) This checklist is designed to help case managers and supervisors develop career coaching case management. The document centers on the following five key topic areas: program objective; career coach functions and skill set; caseload; evaluation and monitoring; and delivery considerations. Rebekah Lashman and Karen Shack, Boston Private Industry Council, October 2005.

[Employment Counseling](#) This PowerPoint, used as a training tool for the State of Florida, provides information on career counseling as mandated by the Wagner-Peyser and Workforce Investment Acts. Employ Florida and the Florida Agency for Workforce Innovation.

[New Strategies to Promote Stable Employment and Career Progression: An Introduction to the Employment Retention and Advancement Project](#) This report discusses the MDRC's findings on the Employment Retention and Advancement Projects. The pages listed describe the job placement strategies used and results. MDRC, 2002. Pages 39-42.

[Discovering Labor Market Information: User's Guide 2010 Edition](#) This user guide provides case managers information on how to use Labor Market Information systems and data in Alabama. It includes specific questions that each set of data answer and how case managers can utilize this information to assist their customers. Alabama Department of Industrial Relations, Labor Market Information Division, 2010.

[Letting Numbers Guide: Labor Market Information and Youth Services](#) One of 12 training packets for the Texas Workforce Board regions on youth services. This resource provides information on how to use Labor Market Information (LMI) in organized career clusters and skill pathways. Texas Workforce Commission Youth Program Initiative, 2003.

[WIRED TAT Webinar Series: Jobs and Career Ladders for the Hard to Serve](#) This webinar describes programs that have successfully connected the hard to employ to training programs and career pathways. It discusses program options and partnerships with CBOs to place these individuals in the workforce. Available on Workforce3One.org (requires registration). WIRED TAT Webinar Series. June 2010.

Follow-up

[Employment Retention and Follow-Up](#) This policy document from the San Francisco Office of Economic and Workforce Development sets guidance for following-up with customer post-exit to employment. It requires staff to maintain contact with a participant for a year following program exit. Staff must verify employment and administer surveys to participant and employer. July 2008.

[The IEP as a Case Management Tool Webinar](#) Frank Lengel presents the basics of IEPs, power-planning, career planning, and successful IEP components in this webinar. Part of a case management webinar series, developed by the Maryland Institute for Workforce Excellence for DOL ETA Region 2. Available on Workforce3One.org (requires registration). May 2010.

Track & Document Services & Outcomes

[Make a Note of It: Documenting Progress through Case Notes](#) Frank Lengel presents at this webinar, part of a case management webinar series, developed by the Maryland Institute for Workforce Excellence for DOL ETA Region 2. The webinar delivers a how-to for writing case

notes, describing the seven elements that should be included in every case not. These seven elements are: background statement, reason statement, observations, content, results, impressions, and plan statements. Available on Workforce3One.org (requires registration). June 2010.

[Case Management Techniques: Tools of the Trade](#) This PowerPoint gives case managers tips on time management, organization, documentation, and communication techniques. It draws on the ASM Associates model and literature. Employ Florida, Florida Agency for Workforce Innovation.

[COWIB Policy on Assessment and IEP's](#) Central Oklahoma Workforce Investment Board's (COWIB) policy document to establish local assessment and individual employment plan (IEP) policy for participants enrolled in Adult and Dislocated Worker training under WIA Title I. This document provides definitions, descriptions, and tools for case workers to develop and utilize IEPs and assessments. December 2005. Pages 7-12.

Administrative Strategies and Tools that Support Effective Case Management

[The Participant Assessment Process: Strategies for Obtaining and Using Essential Information](#) The Charter Oak Group presented this information at the Senior Community Service Employment Program (SCSEP) Forum, explaining the difference between an assessment and an IEP. The PowerPoint outlines the steps to a successful assessment process. It describes an ongoing process that must be updated at least every six months. Assessments provide information on interest, skills, education/training, work experience, and real and perceived barriers to employment. Slides 31-33.

[Using One-Stops to Promote Access to Work Supports—Lessons from Virginia's Coordinated Economic Relief Centers Final Report](#) This report describes Virginia's effort to connect low-income families' access to food stamps and other work support programs through the use of the Coordinated Economic Relief Centers (One-Stops). It concludes that a successful referral process requires coordinated efforts and resources. Mathematica Policy Research, 2003. Page 27-29.