

# Case Management and Services

Engagement and Troubleshooting

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# Engagement is...

- ...a process, not an event.
- ...individualized — the approach a staff member uses for one program participant may not always be effective with another participant.
- ...gaining an individual's trust — and that takes time.
- ...more difficult when staff turnover is high and the program participant has had to change case managers.

# Engagement begins on Day One

## What clients say they *value* in a case manager

- Caring
- Genuine
- Relaxed
- Empathetic
- Accepting
- Respectful
- Down-to-earth
- Shared experiences
- Commitment

## What clients say they *don't want* in a case manager

- Cold
- Uninterested
- Not listening
- Preoccupied/busy
- Critical
- Insincere
- Sarcastic
- Judgmental

# Reminders: The first interview with a program participant

- The meeting place is quiet, private, calm, and warm.
- The first interview is not dominated by excessive personal questions about problems or negative experiences.
- There is time in the interview for the person to talk about their experiences, strengths, hopes, and dreams — and to ask questions.
- The case manager expresses confidence that “we will work together” to successfully obtain and retain housing.
- The person leaves the office knowing what to expect from the program and the case manager.
- The case manager makes a list for the person: their “homework” action steps; the case manager’s action steps; and the date/time/place of the next appointment.

# Ongoing engagement

***“If your services are meaningful to participants’ goals, they will choose engagement.”***

— Staff observation, Home Free rapid re-housing (RRH) program, Portland, OR

# Activity #1: When things get off track

- Sometimes a program participant has been making progress but suddenly (or slowly) disengages. Nothing special seemed to trigger this reaction.
- You may think you know what's happening. Unfortunately, it's all too likely that your assumption is wrong.
- For the following scenario, think about the many reasons things might be stuck. Brainstorm as many possible explanations as you can. This is a brainstorm, so the more ideas you can think of, the better!

# Case scenario: Maryelle

- Maryelle is a single mom, 24, with two preschool-aged children. She returned from deployment and has been unable to keep a job due to anger issues. As a result, of losing jobs, she lost her housing. She doubled up with a series of friends for three months, and then lived in her car with her two children for 3 weeks. Now she has moved into her new rapid re-housing (RRH) unit.
- Initially, she did everything her case manager (Tom, 55) asked. With his help, she found housing and moved in. But then she stopped keeping appointments or answering her phone. Tom went to her house but got no response to his knock; he thinks she was home. He's in recovery and is convinced Maryelle is using.

# What might be happening with Maryelle?

- She has housing and perhaps that's all she wanted. She'll figure out the rest later. Somehow.
- As a female Veteran, there's a possibility that she is a survivor of military sexual trauma. Her case manager is an older man in a position of "authority" who came to her home unannounced, which could be a trigger.
- Her anger might be related to possible PTSD from her deployment.
- She could be totally exhausted. She has done everything to take care of her kids. Now that she has housing, she and her kids may just be trying to recover from the whole experience. Perhaps they're just hanging out watching TV together.

# What might be happening with Maryelle? (continued)

- Maybe one of the kids is sick or injured and she's been at the hospital with them.
- Maybe she does have a drug or alcohol problem and she's been using.
- Tom keeps asking her about alcohol and drugs, which she might find insulting because she never even gets drunk. (Maybe he's projecting his own issues onto her.)
- Maybe she has a boyfriend and moved in with him. Maybe she doesn't live there anymore.

# Case scenario: Aaron

- Aaron, 63, is a Vietnam War Veteran. He has been homeless multiple times and had been staying outside, in a homeless camp by the river, for the past eight months.
- Six weeks ago, his case manager, Nikki, 23, found an apartment that met all of Aaron's requirements, paid the security deposit and first month's rent, and found a nonprofit that furnished the apartment. Aaron usually keeps his appointments with Nikki but rarely sleeps in his apartment. He returns to his old campsite most nights.
- Nikki gathered the documentation for VA disability benefits but Aaron won't keep appointments with the VA psychiatrist.

# What might be happening with Aaron?

- Maybe Nikki is moving too fast for Aaron. She has done everything; perhaps Aaron hasn't had time to think about (and support) the decisions.
- Nikki might be too controlling and Aaron could be deeply resentful about people telling him what to do.
- Perhaps he tries to sleep in the apartment but feels safer in the camp where he knows his buddies have his back.
- If he moves into the apartment, maybe he's afraid he'll lose his friends in the camp.

# What might be happening with Aaron? (continued)

- Whether or not Aaron has a mental illness or other disability, he might not want to talk with any VA “head doctor.”
- Aaron may not believe he will be able to keep the apartment when the rent subsidy ends. So he may not want to commit to the apartment.
- It’s possible he doesn’t like the apartment. Nikki picked it out for him but maybe it’s not his choice.
- Aaron may not be able to sleep well when he spends a night in the apartment (this is a normal “alert” to unknown noises when we sleep in a new place).

# It's hard to avoid assumptions...

**But making assumptions about a person's**

- Motivation
- Fears or concerns
- Hopes and dreams
- Trust level
- Past experiences
- Stress level
- Resilience
- Possible disability

**...can be a recipe for disengagement — from the case manager and from the program.**

# Checklist: Possible reasons for disengagement

Consider these possibilities:

- The person just needs some time to de-stress.
- The Housing Plan no longer reflects the person's current priorities.
- The Housing Plan is too ambitious or too unclear.
- There are problems in your relationship with the program participant.
- You're offering too much help — or perhaps too little.
- Other things are going on in the person's life that are affecting progress in RRH.

# And possible responses...

- Be creative and proactive in re-establishing contact (without becoming invasive).
- Ask how you can help; what does the person want from you and your program right now? (If they don't know, offer some options.)
- If the person has had difficulty with their "assignments," scale back the number and/or difficulty of action steps. Or offer more direct assistance.
- Do not use disengagement as the sole criterion for case closing! Does your agency allow you to put a participant in a semi-active or inactive status for some period of time? Does that status include periodic communication that the person is welcome to come back?

# Question:

What will you do differently next week?