

## Case Management and Goal Planning Skills Virtual Learning Course (VLC) Transcript

- [Steve Dudasik]: For those of you just joining. We're going to give it a few minutes before we start up today, and thanks everyone for introducing yourselves in the chat. We're going to give it about two or three more minutes for everyone to jump on, and then we'll start up.

Hi, everyone. My name's Steve Dudasik with the National Veterans' Technical Assistance Center. And today, we're going to be talking about case management and goal planning skills specific to H.VR.P. This is part of our Fall Learning series events. Some of you joined us Tuesday, and after today, we'll have two more next Tuesday and next Thursday. So, if you haven't already registered for the events next week, please do. We'd love to have you.

[Next Slide]: This is an introduction to our team. I've already introduced myself. The other coaches on the team are Sarah Chung and Jen Steigerwald, and we all work together to support your work, as well as work with the Federal and Regional DOL VETS staff. Today I'll be the lead presenter, and my colleagues will jump in.

[Next Slide]: We went over this Tuesday, but we always present this at the beginning of every presentation to give you reinforcement or an overview of what NVTAC does. We work with you to help you operate successful HVRP Grants throughout your entire period of performance to resolve issues quickly. We provide effective training as well as peer-to-peer learning opportunities that help you gain increased knowledge and adopt innovative and or best practices in the field nationwide. If you would like individualized technical assistance, you can reach out to us directly at [contact@nvtac.org](mailto:contact@nvtac.org). We are able to set you up with a coach for individualized technical assistance based on your specific challenges and needs for training. Once assigned a coach, we will be your coach throughout your grant period.

[Next Slide]: Like I said before, we also provide assistance to the Federal team, as well as regional VETS staff. We talk about things around HVRP strategic planning and what's going to happen in the future with HVRP. We share best practices that we've heard from you all and lessons learned. This helps DOL VETS to develop an HVRP strategy to really enhance and improve upon programming.

[Next Slide]: So today, we are going to be talking about case management activities as well as getting into some planning. I would like it to be more of a talk between all of us. You will find through the slide decks and throughout our whole training series that we're doing that there will be a lot of overlap and a lot of information that you might have heard in the past through other trainings, but it all relates together, and I think it's a great body of work. On Tuesday, we were talking about assessment, evaluation, and acceptance of folks into HVRP. Today, we are going to be talking more about what you do around case management, which infuses the entire HVRP process. You will find there will be a lot of information that we're covering today that will

reinforce what was already said on Tuesday. Also, moving forward, there will be some overlap with the other trainings coming up. During the course of today's discussion, feel free to raise your hand, and we will unmute you as well as put any comments or questions in the chat, and we'll run the discussion that way. I want to start by talking about case management activities and documentation.

[Next Slide]: First, what is case management? Well, it is a coordinated process in which we can access supported services and training to address barriers and achieve employment outcomes. And, as you know, the services may be available within the program, the host organization, or through referrals or collaboration with outside partners.

I think this is important to discuss when you're looking at HVRP. It is employment-specific case management. When I was leading employment programs in the nonprofit world, we would have someone assigned to our team to do case management. But their focus sometimes would be on connecting an individual to services that were not applicable to their employment goal. Case management for HVRP is about employment; anything that is related to the person's employment goals, their challenges, and anything they need to achieve employment outcomes is your focus with case management within HVRP as opposed to a more global idea of what case management is. It is important to make that distinction where all of our activities, all of our skill sets, and all of our counseling interventions are always about the employment, goal, or employment outcome or developing an employment strategy. And connecting your veteran to any outside resource or service is very important, and your role is helping that individual succeed in employment.

[Next Slide]: What are the required case management activities? As you can see, case management infuses all the required activities within HVRP. There is outreach and engagement. We had virtual learning courses around outreach and engagement in the Spring. We spoke Tuesday around assessment and intake and will be speaking on developing an IEP, job search and training, and job placement and retention next week. So again, there will be a lot of overlap because case management happens during all of these required activities. We will be speaking on IEP today as well. As we learned on Tuesday, case management happens at intake, but it also starts at outreach and engagement.

[Next Slide]: Okay, so another important element of case management is documentation. We always say that if you did not document it, it did not happen. You always keep that in mind. I have found that in my career, it was helpful to write my case notes right after a session to make sure I was not missing anything. If you do notes once a week or at the end of the day, you may have many to write and risk losing information. Also important when you're writing case notes is to avoid making a statement about how the person is feeling in your notes.

An example would be, "Steve walked in today for the session, and he was very depressed." In this case, you are making your own assumption as opposed to "Steve came into the session and said he was feeling sad because his job wasn't going well." That's a more appropriate case note. Note that you're not actually saying that the person's depressed, but you're communicating what they were reporting to you when they came into the session. It is very important to have a

distinct and valuable case note and follow your standardized agency process for file maintenance. Upkeep and parameters around HIPAA concerns are very important.

When I was supervising staff, I would say that you don't need to write a book. Just try to be as detailed and specific as possible. The purpose of case noting is to prepare you for each session as you go on, so it gives you a baseline of which to work from for every session that you're going to do with the veteran, so it's always good to have them up to date, detailed and specific. So, when the next session occurs, you could come back and say, "Okay, well, last time we were talking about this; let's move forward on these elements that we discussed or continue the discussion that we had last time." I always felt it helped my work as a clinician to have that. It gave me a baseline of how to move forward with the individual.

[Next Slide]: So here is a poll: Does your organization have a standardized case management process? If you could go ahead and fill that out, and while you're doing that, I'd like to hear from you all: what is your standardized case management process? What does that look like within your organization? What does that look like within your HVRP?

- [Participant]: Hi. In our case, it is like all flows together. We start out with the outreach intake process, the educational means, the field, and all the barriers that they may have. Then we create a case plan, and from that go on to talk about the employment assessment. Employment assessment asks about the person's needs, and we have a dialogue during the process. Then we assist them in completing a resume and documenting all of that. And it's important that we get the time to be involved in the process. We do have a standardized case management process, and we create mock charts to demonstrate how it is individualized to that person. So, when we have a new staff, they can view it as an example.

- [Steve]: Thank you. That is excellent. I really liked what you were saying, particularly around when you're looking at a standardized case management process, where you have a sample case management file that new staff could come in and could be oriented about how your case files are organized, what that would look like, knowing the fact that it is individualized, that is a great strategy to have. You do want to avoid everyone writing the same type of case note for every client because, obviously, it's individualized. Everyone has their own process throughout HVRP as they move to their employment outcome. I really appreciate that; it is cool what you are doing. Thank you.

Any other comments about your organization and how you go about standardizing case management so everyone is on the same page? All your teams are working together with the idea that everyone could, by looking in someone's case file if that person is absent or leaves the organization, the new staff could work with that individual without losing a beat.

- [Participant]: What I was just saying about being able to have your team work with anyone that comes in the door, even if they're even if it is not their person that is assigned to them directly.

- [Steve]: Excellent. Thank you so much. Yeah, that is terrific. And another good comment around this. It is always good to think about this and see what your organization's doing around standardizing as well as what your HVRP program is doing around this. We bring this up to reinforce that it needs to happen, and I see in the poll results that most of you do have an organized and standardized case management process which is great to hear.

[Next Slide]: Okay, I want to talk about specific case management skills. What are we doing in terms of starting the process? How are we beginning a conversation with an individual?

What would that look like? Some things we need to keep in mind are that these skills are generalized for any case manager and are very applicable to our work. We are going to spend a little time talking about them. I want to hear your experiences with these elements that we are going to be speaking about.

[Next Slide]: Okay, we are talking about case management skills. This is really about counseling. What are you using in your toolset as a counselor? What do you need to look at? And these elements we feel are very important. One is unconditional positive regard. Then you have empathy, proactive listening, guiding, and moving to action. Just to reiterate, if you use all these skills combined, it is going to develop trust with the veteran that you are honored to serve, more importantly—or as important, I should say—create hope that the work is achievable. One of the things with HVRP, or any work where you are helping a veteran, is that the development of trust creates hope. We are often creators of hope in our work, which is easier said than done. Think about that, and I see that there's a comment in the chat.

- [Participant]: Not just trust, but rapport is a big thing. Excellent.

- [Steve]: We will be looking at that a little bit later, and we would love to hear more from you about that. We are facilitators of hope. We work with folks who've been challenged with employment. We work with folks who are experiencing homelessness, and that idea of hope might have been something that was lost over time. We could maybe identify with that through these skill sets we are talking about. The idea that hope might need to be redeveloped in the veterans we serve is an important concept in our work. It comes out from, as was stated, developing rapport and trust, and then then the work can start happening.

- [Participant]: Acknowledging when progress is made.

- [Steve]: We will be talking more about that as well. Celebrating success, those little successes that a person makes. Little successes could be, “Oh, my gosh, it is so cool that you showed up today, Steve, for our appointment.” That is a wonderful welcome. That is a little success. We can never assume that is not a success for a person who is showing up for their appointment with us. So, you celebrate that. You look for those little success points, and that further develops trust and reinforces hope.

[Next Slide]: If we look at unconditional positive regard. What does that really mean? Well, it is respecting everyone as a human and assuming that everyone is operating or doing the best that

they can. And more importantly, you are non-judgmental of a person's life experiences. When I talk about unconditional, positive regard, I often look at the second bullet here: non-judgmental of a person's life experiences. We are all human. We all go into any situation with our own thoughts and ideas, opinions about life, and perhaps about others. When we talk about non-judgmental, when we talk about unconditional positive regard, it really is asking us as clinicians as case managers, to take a step back and really reflect on our biases, our own pre assumptions of folks before we can go into a case management process so we can be completely non-judgmental of the person that is sitting in front of you. I'm wondering if anyone has any thoughts about that about looking at your own personal biases before you begin the work of case management.

Has anyone had experience working with someone whom you know this person's been through a lot but do not relate very well to that individual, and how you might have handled that? If you are willing to share, that would be terrific.

- [Participant]: I know, in general, I like to follow the golden rule of do unto others as you will have them do unto you. So, it is like, yeah, you know, I might not agree with something, or cannot understand something, or you know, whatever, just like, you know, they might not agree or understand something. With me too, but it is like, at the end of the day, how would I want to be treated? We all want to be heard, understood, and listened to. So, I think that when I help our clients, I am always asking myself, how would I want someone to help me or, if not me, like a family member that I love or a friend or whoever that I care about?

- [Steve]: That is terrific. Thank you for that. Personally, I have worked with folks whom I have been challenged to work with. Particularly people who, for example, have been incarcerated for manslaughter. That was difficult for me, and I got good supervision early in my career, looking at my bias and understanding that this person experienced this. They are always doing the best they can. Asking myself, "How would I like to be supported and helped if I was in this situation?" It was very affirming to me as a counselor to be able to look at that and move forward just with that idea, "How would I like to be treated in this situation?" Given that veterans are coming to your HVRP program with a story, with life experience, with challenges, with things that that they need support with. Understanding that really helps in terms of developing unconditional positive regard. Any other comments regarding unconditional positive regard, needing to understand where we are coming at when we sit in a case management session with our biases and thoughts that we might be projecting?

- [Participant]: It's not where you are and expect them to be.

- [Steve]: Yes, a big element of unconditional, positive regard. We always say, meet the veteran where they are at. I have worked with staff or as a clinician and needed to understand what that means. What does it mean "meet the person where they're at?" In our work as case managers, clinicians, and counselors, it is semantic. We work in words, but we also work in meaning. So we are always trying to be aware of what we're doing, both in words and in the meaning of those words. I might be sounding abstract here. But I think it is key. Meet the person where they are at. What does that mean to you as a practicing case manager? Then you move forward with that

meaning, work with your colleagues, and any support you might need as a clinician doing this very interesting, wonderful, challenging work to move forward to help you be the best-case manager that you can be.

- [Participant]: Personal opinion is not the best thing for the vet. That's how I work through that.

- [Next Slide, Steve]: Let us move on to empathy. This is another thing that I would like to bring up with everyone. We are meeting the person where they are at and understanding their experience and feelings. I want to throw out to the group here the skill to distinguish the difference between empathy and sympathy. How would you respond if I asked what is the difference between empathy and sympathy in your mind when we look at them in the guise of case management, and how do you communicate that?

- [Participant]: I believe empathy is what I look at. Empathy is what I said before. Do unto others as I would have them do unto me, like placing myself in that person's shoes and understanding from their side. That's empathy. When I think of sympathy, I think I feel bad for somebody. Like, "Oh, like I feel bad for them. I feel sorry for them." So, empathy is placing yourself in another person's shoes and understanding their feelings about where they are. I feel like you never know. When you can be the person imagining yourself in somebody else's shoes, who's doing the exact same thing that they have done, you never know until you are placed in that situation.

To explain empathy and sympathy: Empathy for me is when I put myself, as the previous person said, in their shoes, and really just experience what they have experienced. Sympathy is like just showing my heart goes out to you.

- [Steve]: Yes, absolutely. Thank you for these comments. It is key that, as case managers, we want to be empathetic. We could be sympathetic when the person leaves the session or when we go home and think about the people that we are working with, but in terms of case management and practice, empathetic is the one we should always be.

- [Participant]; Empathy is I feel with you, and sympathy is I feel for you.

- [Steve]: That is just excellent. In my career, I know that I would sometimes make a statement and say something like, "Oh, man, it is really horrible that you are experiencing homelessness right now." They would say, "I don't want you to feel sorry for me, Steve." The better response would be, "Oh, you know, what is that experience like? How is that playing out regarding trying to achieve an employment outcome?" I think it is key to our work. Always check yourself in the session. Ask, where was I in there? Am I showing empathy, or am I being more sympathetic in my responses? I always felt it helpful in my career as a case manager and a counselor to take a step back from almost every session I ran. Ask, "how did that go?" Where were the elements that you felt went well? Where were the elements that you didn't feel went well?

How does that relate to the skill sets we're speaking about now? It takes a lot of personal exploration to be a productive case manager. I know it's helped me in my career, always taking a

step back and analyzing how we are communicating. Ask, “how is it going?” Did my responses work in this session, or did they not? If they did not, why? I think it's very important to do that.

[Next Slide]: So, when we move on to proactive listening, we can see that these all flow into each other. If you have empathy and unconditional positive regard, you have developed trust. Now, you are seeking to gain insight into what the veteran is communicating through reflection, asking informed questions, and can remain focused on learning about the veteran’s experience of homelessness and how they perceive it. So, it is learning about where the veteran is at, what they are actually saying to you, and questioning if something different comes up in your mind. Because you have developed trust and hope through unconditional positive regard and empathy, you can now ask questions that really probe into where the veteran is at and where they want to go.

For example, a veteran can say, “Well, Steve, you know I'm interested in computer work.” An informed question would be, “Well, that is great, but why is that? Why are you interested?” Something as simple as that. You are reflecting back to them. As was mentioned Tuesday by our wonderful guest presenter: what is your why. Or why is your what, to flip it. So that would be an element of a counseling skill. The art of communicating and asking questions that are informed helps the veteran reflect on what they are saying to you. That is proactive listening to me. And through this, you can learn together with the veteran how they want to move through their vocational process.

[Next Slide]: So, then we move into utilizing all these skills. We're going to guide and move to action. This is very much under the element of motivational interviewing, which we will be talking about shortly. It is about using these skills to motivate veterans to achieve their employment goal. It is a learning process. It's fifty percent work on your end and fifty percent on the veteran to move forward in terms of their action and their process in terms of gaining employment. Often when you talk about case management and the skill sets that we have been talking about, there seems to be a misconception of what is a “client-led process.” Sometimes I have gotten into this situation where my involvement in the case management session was not guiding or moving to action, just listening without an idea in place about moving a person forward, only reflecting. It is always good to know, in case management, that you are a person that is going to motivate and move an individual to action. Does that make sense? When you're guiding and moving to action? Is it something that resonates with you? That it's not just about listening. It is about guiding. And how might you do that? Any comments about that?

- [Participant]: I'm from HVRP Easter Seals, Eugene, Oregon, and Link County. When looking at my clients, I express to them that this is a one hundred percent relationship, but I don't like these fifty-fifty things. I think if you're investing in the veteran one hundred percent, they need to invest back one hundred percent and make the expectations known to keep them motivated. I am here to work with you, so what you invest into me is what I invest back into you, so if you're moving quickly and you are wanting to do these things, I can move with you, and I can help you out if you're struggling a little bit. I will pick up the slack, give you that little lecture, and help motivate you guys to do those things that you need to do.

Motivation is a big one. That is very key to how you are when you come into the office. If you are dragging and you are down or whatnot, they are going to pick up on that. They are going to pick on that very quickly. So, you have got to come in with high energy. You have got to be upbeat. You have got to be promising. You have got to be a smiling face, a warm smile, very, very friendly, and they are going to pick up on that, and they're going to realize that "hey, he is here, he is motivated and wants to do stuff. For me? What can I do to make this better for him? So he can help me more." And I think that's where this comes into that move to action where you can motivate them, and you still show empathy. You still show positive regard and give the proactive listening to hear what they're saying. These are their troubles right now, and these are the things. So, you work solutions out, but you have a smile on your face, and you show a positive mental attitude. They pick up on that, and they reciprocate that back.

- [Steve]: You have said wonderful things. Thank you for those comments, and you are exactly right. Everyone I have ever worked with in my career as a rehabilitation counselor picked up on my behavior within that session. They picked up on it. So, you are absolutely right. Having that positive outlook during your session in using these skills is a motivational technique because you are creating—and always reinforcing—trust. You are always reinforcing hope, and part of that is to be really involved and engaged in the session with a smile. An excitement so that the person is sitting across from you and thinking, “wow, look at all this great stuff we're doing together,” relating back to what you have been doing together as a team to move to employment success. It is like: “Wow, this is so cool. This is our third session together. So glad you are here again. You know we've been talking about this, and we are excited to move forward together on this.” So, to your point, it is so cool that you mentioned that because it is so important. We could never forget that the folks we're working with are picking up on where we are at, too. A motivational strategy is to model our excitement that work is achievable for them and that employment is going to be a solution to end their experience of homelessness. To continue to model that I think is important. And any other comments? I think there is one in the chat.

- [Participant]: Work together as a team with a particular goal in mind.

- [Steve]: Excellent. Yes, absolutely. When you are guiding a move to action, it is part of that. You are always relating back to the goal. We have this goal for you together that we established. We have this goal as an HVRP team for the people we are serving. Always reflecting on the goal, and that is guidance and moving to action as well. The motivation is there, the hope is there, and it is going to move forward if you keep these things in mind.

[Next Slide]: I want to move to motivational interviewing and talk a little bit about what that might mean. We heard a little bit on Tuesday about what that is and some techniques. One thing I will say about motivational interviewing is: “what is it?” I think there's a there's sometimes, in our field, there is a misperception that motivational interviewing is a best practice. A formulated structured process, but that is not what it is. It infuses all of the work, meaning that it is a collaborative conversation that focuses on participants' motivation to change, and your role or case manager's role is to focus the conversation, but the veteran that you're honored to serve is driving the process. But you are the guide and focuser of the process.



For those of you who are familiar with motivational interviewing, it is based on the trans-theoretical model of change, where everyone is in a different stage of change during their life. When they are moving towards a decision, they are either in pre-contemplation, contemplation, preparation, or action. For each stage, there is a different case management skill set that needs to be utilized to move the person forward. We will go through these a little bit. Then I want to ask about your use of motivational interviewing or if you see this applicable to what you're doing.

[Next Slide]: What are the stages of change? What does it mean?

If a person is in pre-contemplation, they're not considering change or seeing it as an option. Employment is not considered or thought about. This might happen during the outreach and engagement phase. It might even happen during the initial intake phase.

What are you doing here as a case manager? You are encouraging and exploring the reluctance to work. "What do you mean that you are not interested in work? Let us talk about that. Where are you at now? Let's talk about that a little bit." It is that whole idea that "I do not know." I always tell people I would be a billionaire if I had a penny for every person that was sent to me, or referred to me, who said, "Well, my social worker told me that you give out jobs, and here I am for you to give me a job." That person is not really contemplating employment. They are pre-contemplating, and it seems like in that stage, you say, "Okay, why did your social worker send you here? Let's talk about this idea of giving out jobs." That would be an example of someone in pre-contemplation, and we would learn together and explore what that actually means with them.

Then, contemplation. It is a person who is thinking about making a change but is not really sure about doing so. They are seeing employment as a possible goal. So, in this stage, you are actively listening and asking. This is someone who might come to you as an HVRP Referral, where they might say, "Well, you know I worked in the military, and now I'm thinking about doing it again. But you know what, it is really hard because I am in a shelter." So, they're contemplating it, they are almost there, but they are not really sure that they want to move forward. So, our goal is to draw that out, that active listening and asking and say, "Okay, where are you at now?" And you are talking about employment. I would start by asking, "what did you do in the military? Let us talk about that." You are developing a sense within the veteran that they want to contemplate moving forward. You are having them give you feedback about their past work experience. You are beginning to infuse in them the idea of working as a possible goal, and you are creating hope both in the pre-contemplation and contemplation stages. You are generating hope, particularly when someone moves to contemplation. They may say, "I'm thinking about it, but you know I'm in a shelter." You say, "Let's talk about what you did in the military. You do have skills. You do have a skill set. You worked." Building that up, that sense of self-esteem regarding work is a very important technique, particularly in the contemplation phase.

Motivational interviewing is an eight-hour training, which I have done in the past, but we are not going to do that today. We are just summarizing some of these elements. I just want to make that clear before I open it up to everyone for some comment.

We do have a hand raised.

[Participant]: Setting goals big and small. Understanding what they want and need, following through and doing what you promise, making the goals small and attainable, and building through with them. Constructive criticism is a big key in this. Being upfront and honest with the client right off the bat works well for me. I do not make promises.

- [Next Slide; Steve]: Excellent. Yeah, that is right on. It is about contemplation. You are helping an individual contemplate and move forward with honesty and learning about where they're at and where they want to go. So, you are doing both with your statement. One thing that is great, we are working with veterans, and in my experience, yes, being honest and upfront, veterans like to hear that, and they have been socialized to experience that in their military life.

- [Participant]: This is the beginning. But yes, this is the beginning stage of building rapport.

- [Steve]: Absolutely. Okay, good stuff. We have another hand raised. Hi, are you muted?

- [Participant]: I am sorry my mouth is not working. I was really excited about this motivational interviewing. Actually, we had a training on it yesterday. At all phases, I have to be motivational. I have to be able to encourage in person. If I go in and am all down, if I am having a day, or if something is going on with me, not only can the person feel that, and so will I. If you do not want to be about me finding a job, you are just like, "sign his paper." It is not going to work, you know. I do not mean that you have to be giddy about it. However, you have to have a positive attitude. So, motivation of the community. But it is so cool, the delivery of services that we provide because if I cannot do that, I do not see it. To believe it.

- [Steve]: Thank you so much for that. I mean, you bring up a few good points. One, we could determine this from our discussion today. That is critical. Case management and counseling are hard work, given the fact that we have to be on as soon as we walk into our agency's door. As soon as we start meeting with the veterans that were on to serve, we have to be on even if we're not having such a great day. We have to be on because we honor the people we serve, and the veterans we're honored to serve expect that from us. It is a key function of any engagement role, an effective case management role, and it is difficult. And I understand that I've been there. You know, been there, done that! It is hard, hard work, and I want to just throw that out to all my colleagues on this, that we all realize that. I think we could all hopefully relate to what I just said. It is not easy work, but I think going over these things we are going over today helps us be more present in our work and helps us do our work better because we are coming from somewhere.

We are able to provide a service where we have an idea, when a person works into our office or wherever we are meeting that person, what to do. The worst situation I could ever imagine a case manager being in is when you are meeting with a person for the first time—or the twentieth time—and there is no intent for that session because you are not really clear about the session itself. Usually, utilizing these tools helps focus your work in your efforts and helps you be more

there, as I just said before, there in your work. Moving on, hopefully, there'll be more comments in the chat. Feel free.

Once the person is moving into preparation, they have defined their intention to change and has plans to do so. So this is a person who wants to be employed and has established an IEP with a defined plan, and our role is to continue to guide and ask and move to action coming up with all the supports that are necessary for a person to achieve their work goal whether systemic, whether it is individual, whether it is learning about workplace culture, which will be talking about more in next week.

Once that occurs, the person then moves to action, so they are really committed to making the change, and they are following the plan. This is a person who is probably moving to interviewing and has succeeded in employment. We have to be aware that it takes a lot of time and emotional energy to really commit to making the change and really commit to following the IEP, and I always say, "Well, look at our own lives when we commit to making a change. What does that mean?"

In our own lives, how much time and energy might it take to move a person to action? I see a comment in the chat.

- [Participant]: Case management is like a game of chess. You have to be at least three moves ahead of your client at all times, or it becomes a struggle to help them. Expressing to these vets the time you are investing in this process, big or small, will bring results. Big or small, your time is not wasted anytime. We are talking about training, jobs, etc. If so, that would be great. Absolutely. Absolutely. Thank you so much again for that upfront conversation. You know, that idea? That we're working together on this? And again, the goals you are accomplishing are making life better.

- [Steve]: That is an amazing comment. It is great to build motivation. It is great to build any of this throughout the stages of change, and it is celebrating that success. Take time to really realize these little success stages that the person's going through, which will help guide them as they move to action. When someone is in action, they have committed all this time and energy to make the change. They are following the plan to gain employment. They are succeeding in employment, and they are maintaining employment. That is the action phase. So here it is continued to offer ongoing case management support, inform, and clarify the direction in terms of employment. When we talk about clarifying direction, you know, as we often know in HVRP, that the first job a person has to achieve is not necessarily the job they are going to have for their entire life. It is that idea of career pathing in HVRP that is very important.

What skill sets are you learning on this job? Is there anything we can move forward and take these skill sets and apply them as you move further in your career? That is clarifying the direction. Or what did not work out on this job for you? Going on another path would have the veteran return to preparing and/or clarifying again, maybe in a new career direction. I think it is very important in the action stage to provide that as a support, and you are informing and

clarifying the direction. The person has already invested all this time and energy to plan, gain employment, and achieve employment.

[Next Slide]: Okay, before we move to goal planning, any other thoughts about motivational interviewing? Any techniques? Did it feel like something that looks like a good system or a good mindset to have when you are doing case management? Okay, we are going to move on to goal planning. This has been a great discussion so far. I see a comment in the chat.

- [Participant]: Being adaptable!

- [Steve]: Thank you for that. Absolutely! Being adaptable, being flexible with your service to the veteran that you are moving along where they are at and using all those elements. It is very important. Case management, I always tell people, is an art. It is not this prescribed concrete process. It is an art of communication. It is the art of helping an individual to understand themselves. And because of that, they move forward with their initiative and motivation. That is what case management is. So that is a really great thought. Thank you for that.

Okay, moving on, going to goal planning. We will be talking about this next week as well at our session on Tuesday.

But I just wanted to talk about the initial elements of an IEP, an individualized employment plan. So, we all know this, but it is always good to put them on here, on slides that you could refer to. So, you know, it is based on veteran choice. It identifies job strengths and barriers to the goal and all resources, supports, and stakeholders that could aid in the process. Of course, we use the old SMART elements of IEP development. The goals should be specific; they should be measurable; they should be achievable; they should be relevant to the individual's choice; and, they should be time-bound. So, in an IEP, you want to be able to include all of these elements, and, again, it is moving through both long- and short-term goals.

[Next Slide]: I wanted to bring up that, throughout this process, and this is both on the system level and the work you are doing with veterans, where we have already had comments about focusing on the veteran's work, speaking about employment being a motivator and of our own excitement about working with the individual who is trying to achieve that. But it is always about work talk, so it is always about focusing on the goal, always talking about employment with the individual, and really, if we look at number two here, challenging the veteran and staff to recognize their perspective and think differently about their experiences. So that's both. When I say staff, that is both internal and stakeholders. Work talk may include discussing previous successes and failures and encouraging participants to explore new possibilities. I just want to add that as HVRP providers, if we look at this at a systemic level, if you are working with partners, working with referral sources, who may not have employment programs, or really understand employment programming, you will engage in work talk with them as well using these techniques. It is almost like you are working with the system as well as with other referral sources.

For example, say, “Hey, you know this is what we are about, work is a solution to ending homelessness, and we, in our HVRP, are functioning that way. And for the individual you sent to us or are interested in sending to us, work is possible and doable for them. It is going to happen because we're so excited, and we have seen it happen.” So, you are actually influencing the system as well around work talk. I always look at this as a rehab counselor, breaking down silos that might be in the community. For instance, not to criticize, but maybe there is a group in your community that says they do housing, so perhaps maybe they are thinking among the staff that is all they do. “We do housing? Why do we even want to talk to HVRP? We do not even know about that because we do housing.” So, engaging that system, or those folks in work talk, might change their opinion about employment. “We are the experts in housing. You are experts in employment. Let us work together here and move forward with the individual because it is going to end their experience of homelessness.” And that is what work talk is. It is always said that employment success is just as integral as succeeding in housing. It's integral as a long-term solution for individuals ending their experience of homelessness. So, work talk to me is very important. We are the champions of work and the possibility of work. And we have seen work work for the folks that were honored to serve, and sometimes I know I have been in communities where I needed to impart this knowledge or reinforcement.

How important is work to the system and the individuals we are honored to serve, any thoughts on that? Maybe working with stakeholders around employment, their understanding of that, and what it means. And what does it take? Does anyone have experience with these kinds of silos that we might come up with in the community?

- [Participant]: So, we have. We have various programs that we work with within our HVRP that are outside our normal group of people. So, when we have our veterans working with these outside groups, sometimes it is hard to motivate them to do other things save for housing with the SSVF type program where you are working with that, and they are waiting on housing, and they're waiting, and they are waiting and waiting in a way. Well, it is finding a way to engage them, to convince them, make them understand that while you are waiting for housing, we can do all these other different things along the way we can do like this IEP. I can help you build a resume. Hey? Yeah, these are the job skills that you have. Maybe we should go get some training to help bolster your resume and get that training and get these things and get these other activities done. Maybe we send you to some job clubs, or we have some interview training where we do a mock interview with some people in the office that are not your case worker and you. You have them run through a couple of different interviews, or you have them. Do a resume-building class so they know how to build their resume. Not just have you build it, but they build it now, and they can learn the skills for that. You start teaching them. Try to get them engaged while they are waiting for this because sometimes those programs require them not to work until after they get out, so that's what we try to do. We try to engage them as much as possible to get training, resumes, job clubs, and all these other things to do. And then when housing comes, that is that big burden, that shoulder, that burden off their shoulders, and they go, “Okay, I am in housing. Now, let us fight and figure out work, perfect.” Well, you are all set up. Now let us start

doing the job. Let us talk about work. Let us talk about what jobs you really want to do and tailor your resume to that. Now, let us make some changes, and then the process goes a little.

- [Steve]: Absolutely. I relate to exactly what you said. You know, one of the things that, again, if we talk systemically when you are working with partners, an idea that employment or work happens after is key to kind of challenge because it could happen in concert with. So that idea of engaging, you know, a veteran who might be an SSVF waiting for a housing placement within SSVF, that they cannot talk about work or think about work until they get housed, is something we could challenge, I think, as HVRP providers. You are folks who get how employment ends the experience of homelessness. We are engaging in work talk right at the beginning. So, work talk in my mind happens all the time; it happens at assessment, it happens at outreach. Obviously, it happens at assessment, happens all through the process, but going to your partners, too, is challenging this perception that they have to wait. I have worked with folks in the past that said, "Well Steve, you know I'm not going to even mention work to the folks that we are working with because they need to be," quote (and I don't know if you see me on the screen, but I am making quotes here) "they need to be cured of their schizophrenia before we could even think about work with them. So, we are not even going to refer them." So that is an example of a systemic barrier that we might face as employment professionals and an opportunity to break down silos.

So, I would say I have worked with folks who had "Axis one," and we have been very successful in helping individuals with that become placed. So, you say that work is improving individual self-esteem, their neighborhood living, they are now permanently housed and happy, and they are successful. So, you break down a silo in that regard, too, and to your point (participant) about engaging veterans in the process while they are "waiting" for something else is very key. When we talk about work talk, any other comments around work talk or silo reduction in your communities?

- [Participant]: Competent confidence in themselves, and it just went out on helping better and gain confidence in themselves is important for success.

- [Steve]: Absolutely! Confidence drives success, right? Confidence is a self-esteem builder, and you know we could talk all day about that.

- [Participant]: Effective case management does but another thing it does is develop self-esteem within the individual, highlighting their strengths for success.

- [Steve]: Yes, absolutely strength-based approach. Celebrating success, developing that self-esteem, that work is possible and doable, and one that will be maintained once they gain employment, very much a key to what we are speaking about today, excellent comments. Before we move on, any other thoughts?

[Next Slide]; Okay, great. We will move on to the next slide. So, I wanted to talk a little bit about case conferencing. I think we were just relating that a little bit to silo-breaking. So, when you are

working with a veteran, we know it is important that stakeholders gather together to discuss common or shared veterans that you are working with. You are understanding what the individual's plan might be with the other organizations. So, you are conferencing to ensure that the different plans complement instead of competing with one another, and it ensures that everyone has the same information leading to better outcomes. So, this idea of different plans, complementing instead of competing, I think, is very key, and through proactive case conferencing that where employment goals can be infused into the therapeutic plan. If they are getting, you know, psychiatric support services, you include employment in their plan, and you are part of the process. You are part of those wraparound services, and it is always good to be on the same page with all the stakeholders that you're working with and all the referral sources you are working with to make it happen.

You know, we spoke about how to develop partnerships. And we did a series in the spring where we spoke about this. How effective that is! One of the strategies I always felt important was to develop a bi-weekly or monthly meeting where you go to your stakeholders with your shared veterans and discuss where they are at and how we are doing this together. You know you would need releases to do that, but it is very effective. And I think one of the comments in the chat just came up.

- [Participant]: This is a fantastic thing, and it works.

- [Steve]: I do not know if you are responding to mutual case conferencing, but I think it applies to this as well. It does work, and even case conferencing within your HVRP team or within your agency, in and of itself, is very important to think about and encourage and impart, you know, positive case management outcomes for the folks you are honored to serve. Any thoughts?

- [Participant]: So, we have set it up where we do a monthly case conferencing, and we meet with the SSVF program and have a couple of the programs that we meet up with. I think it is a fantastic thing that works when we get it going, and when we do it, it is the ability to bounce ideas off each other. How to touch base with clients that we are cohabitating with and working with on multiple levels. So, these caseworkers on the other end are trying some techniques that we are not trying, and they are getting better success than we are. So, we take those, and we do vice versa, and we share techniques.

We share ideas and ideologies on how to get these veterans to respond, work together with us, or just be more attentive at times, or how to how to remedy issues whatever the case might be, whether it is a communication error or updating a person now, or whatever the case might be. All these caseworkers are no longer here. So, we move these cases over to these people. Now we get to meet these caseworkers. It is very, very much a useful tool to help in the process to make sure that everything is streamlined. It also gives us an update on where they are in their process. Oh, we've set these timelines for this particular person. They are getting this in this and this. Now you are, like I said, with chess mentioning you are three steps ahead. Oh, he is getting housing here. Okay, I have this much window of time. Let us see if I can get him some training on this. Do that. Do this. And now everybody is on the same page.

- [Steve]: That is excellent. And you know, I see that we'll get to the other hand in a moment, and a comment says it helps for everyone to be on the same page. Absolutely. We never want to work with a veteran who feels, "my social worker at SSVF or my social worker at the shelter says this, and you're saying this." All of a sudden, the veteran is, you know, in my mind, pulled apart in terms of their emotional well-being, in terms of the case management services that they are receiving. It is like that disconnect, and they do not know where to go, and I wouldn't know where to go either if that happened to me. I see another hand raised.

- [Participant]: Can you all hear me? I think that, like all, communication is key to everything. My supervisor and I, we have case consultation on my clients bi-weekly, but I feel like within our team here at HVRP, we just pass information, you know, as often as we need to. If the employment specialist or the outreach person does an intake, like they are meeting my client before I do, one is when the client is assigned to me, so it is like, yeah, they are passing on information. They will even come back. And because they know that personnel want to meet with that person, so it is not like, oh, that is my client. We all work together as a team. For everyone, it is where you do not mind you know me. And we have had a client that we have to meet with when somebody is out, and that is how the client becomes comfortable with everyone on the team.

For SSVF, when we share clients, I know who the case manager is.

We have meetings as often as need be. It could be every week, every month, or bi-weekly; it was never monthly because I know it is up to them more.

But as often as we need to. I'll share whatever is going on. Like a client, you know, missed an appointment with me. This is what is going on, on my side, and they tell me what is going on, on the housing side because sometimes what affects one affects the other because it is holistic. Like sometimes, a client can't meet with me, and they forget to communicate with me because they have to go see an apartment or something like that. Or because they are going through a lot because they are being evicted, or something like that.

- [Steve]: Absolutely. Yeah, thank you for that. It is holistic, and you know, either a formal or informal communication with all stakeholders is wonderful. I think in my mind, having both is very productive, having a formal meeting with your stakeholders, if you have a prime referral source, if it might be SSVF. Whatever it might be, have a formalized meeting scheduled as well as those informal contacts where you know the other case workers outside of your HVRP program, and you are networking and communicating with them and, again, for those of you who are in large agencies communicating with the other departments or other specificities within your organization. Obviously, it is key.

I see another comment.

- [Participant]: It helps the veteran be accountable. Talk about motivations like, "Well, you know, this social worker said this, and you are saying this, so I am not doing this."



- [Steve]: Yes, it holds them accountable for their process, and it helps focus your work to provide the wonderful services you are providing to them. Okay, I don't see anything else in the chat, and there are no more hands raised. Let's move on.

[Next Slide]: Okay. So, I thought we would do a few scenarios and throw it out to the group for discussion about, you know, what the process would look like. I know we have had a wonderful discussion so far, but I thought we could talk about some practice case scenarios and hear from the group what your approach would be, so why don't we go to scenario one?

So, Steve is a 55-year-old veteran who uses a wheel, uses a wheelchair, and is in a HUD-VASH program. He has been an active HVRP participant and expressed an interest in working with computers. He is meeting with the case management and manager to develop an IEP.

So, I'm going to throw it out to the group for discussion for those of you who would like to participate. The question would be: How would you begin this session with this individual, with Steve, let us say, and, you know, you are beginning to develop an IEP?

We have two hands raised.

- [Participant]: Whenever I have a client intake, here we have veterans who are disabled and want to work in the workforce. We first gather all the information from the disability, as well as see what their barriers are and maybe get a resume, and see if his resume is up to par within the computer field. If it is not, we will go ahead and revise it or reach out to our resources. Or counterparts that assist with the revisions of resumes.

Once that is met, we will reach out to our resources that assist with computer employment and give those resources to the veteran and see if that is a fit for him and see if the resume fits for him as well, and if so, we'll submit it together and see if we landed.

- [Participant]: So, with me. I'm looking at you, and I understand, and we are having a conversation. I am going to have a conversation with you. I'm going to ask you, "Well, what was your military record?" I am going to do some digging; I am going to do it from our intake; I am going to understand where you are and what you did. Did you have a computer background from the military? Did you have any computer background from previous engagements? Was that something you studied after you got out or before you got out? I'm going to take a look into all these things. I am not worried so much about disability at this point because working with computers is an easy one. What we do is we stick ourselves out there, and I ask him if he does not have any training and what he would like to train in. Does he want to be a computer programmer? What field does he want? Get real specific, real nitty gritty about. What he wants to do, and where he would like to be set up.

Some goals, see some ideas. What are his short-term and long-term goals? To understand what he is really wanting to do with computers. Does he want to build them? Does he want to fix them? Or does he want to work on the actual inside where he is working on websites, web pages, and web browsers? Where is it that he wants to work with computers and kind of get that detail

and get that training form, Build his resume up. And again, I'm going to also reach out to my resources, like the default going to reach out to work source and make sure that all the resources available to me are there. Scholarships that either work source or another program might offer. All these other tools that I can have provided to me, along with the HVRP stuff that I have available to me. I want to use every asset I can for this one client to make sure. And this is how I see it for all clients. So, I do it for this client. I want to make sure that I give him every available option, and then I present it and go.

Well, these are your options, and I laid them out in one, two, and three or one and two. These are your options that I think might work best for you. If you do not like these, we can go look at some other options and give him choices. Let him have the right to make choices. If he does not have a choice, then he thinks you are just throwing it at him and demanding. That does whatever you give him, so give him choices. The better choices they will be able to make that decision on their own and giving them a chance to grow and think about the work process and understand the work process.

- [Steve]: Excellent. Thank you, and I have a comment in the chat.

- [Participant]: This is someone who came to us, came to you, who is actually really engaged in the process. So, we know right up that there is some motivation here for Steve wanting to work in terms of his actual work goal.

- [Steve]: He is clearly. If we go back to those motivational interviewing techniques, he is still in contemplation because working with computers is very general, and our role would be to guide and listen and to ask what that really means. What is your why? What does that mean? And everything that was brought up here, you know, in terms of intervention, is really good. One thing I would add is that if I were working with this individual, I would think about saying, "Okay, working with computers. Here are your options. Let's learn about this together. And by the way, here is some homework. When you talk about computers, it could be anything. Let us first learn about it together. Where do you want to go?"

Give homework. "Here are some resources you could look at online." Used to be in the old days the Occupational Outlook Handbook, Dictionary of Occupational Titles. Anything that is engaging the better, in their process of researching along with you to define what they mean by working with computers. I think it's really important because if we're looking at it, you know. It is a one hundred percent process. We're in this together. Homework has been a very effective tool that I have utilized in the past, and you could set up what that homework is.

You can say, "Okay, Steve, next time you come back, let us talk about what you learned about working with computers." We could continue to work together in this wonderful process. Thank you for being here. Let's move forward, you know, stuff like that.

I'm seeing one more comment.

- [Participant]: I would want to know if his interest in computers is because he is in a wheelchair and he feels he cannot do much of anything else. I would have him do the O\*NET aptitude to see if his results show us the same interest or if it shows a possible different path that he may be scared to try since he is in a wheelchair. He is ready to roll, and we are here to provide all of those supports and necessary, you know, case management actions to help move him along.

- [Steve]: Really great stuff. I am loving this. This is my love, doing rehabilitation counseling.

So, we move on to scenario 2, and we will get hopefully get more feedback with this.

Diane is a 45-year-old army veteran who served in Afghanistan. She's currently in an SSVF program and receives treatment for PTSD through a VA outpatient clinic. She has experience working in an animal shelter and has that as an IEP goal. She was meeting with the case manager to discuss next steps.

I'll throw it out to our colleagues here. We have a hand raised.

- [Participant]: I am back again! So, with this wonderful lady, I would be looking at her, and we would just have a conversation. Well, I see that she's got PTSD, and animals are a fantastic outlet for this. Lots of studies have been done, and things like this. I see that the IEP goal is showing that she wants to work in animal shelters and things like that. I kind of want to know what her background was in the military. Was she a medic? Was she anything like that? What are our goals, and what can I do to get some training? I am going to look at all the animal shelters. Maybe look at the possibility of zoos, if not an animal shelter. Maybe if there's a local zoo or something along those lines where there's like a raptor park, or maybe they have endangered animals they bring in, maybe that is something we can look at too, as well, and look at the veterinarian services, if she is interested in doing that, depending on how post-traumatic stress can put her in or out, depending on if she is not one for blood. We can look at all sorts of different types of scenarios and jobs that relate to working with animals of all sorts, kind of picking types of animals she does not want to work with, or she might have a fear of or something like that, so that we can avoid those. We can try to see if we can figure something else out. But I think if she has got the right track, and she has got the right motivation.

This is where we dig a little bit deeper. We just ask those engaging questions, and we ask her, maybe, like you were suggesting with the homework idea, what are some places in the area that could be relevant to where you would like to work? Where would you like to work? How far are you willing to travel to do this, or do you want to do this part-time? Are you wanting a full-time job? Because I see that you're doing treatment for PTSD. So maybe do we want to do part-time right now while you're still working with your PTSD to providers through the VA. What does that entail as well? So, we need to make sure that she's best served to make sure that all her needs are met. But yet, she can still do the job that she wants to do as well.

- [Steve]: Excellent. Thank you. Anyone else? Thoughts on Diane?

~~Participant: Hi, I actually had a service dog's son, and it was with that, and there was a good day. And he was actually out of one of our veteran homes, and we put together his IEP. I contacted Goodwill, and they contracted with a new animal shelter that had just come on board, where they actually work through Goodwill for a trial period to see if it fits them well, and it turned out it did. He still works there. He has been there for 90 days now and just absolutely loves it. It is a great environment for him. It does help him with his PTSD. And the other thing that we are working on is, I found out a different program. Let me see if I can find it here. There is a program for veterans that takes about two years, but for veterans also needing service animals. As soon as I find the name, I'll have to put it in the chat. But this program actually works with veterans to get them qualified and a service dog trained, whether it's for PTSD, emotional or physical, and it is absolutely free to the veteran. It was really neat to find out about this program. I actually found out about it through a family member, through my spouse's side, and he was telling me all about it. It has taken about a year, but his dog is about ready to be sent up to him from Tennessee, and he would be the third recipient here in Missouri to receive one of the PTSD support dogs.~~

- [Steve]: Wow! That's cool. What a great resource! Okay, thank you for your comments, you know, getting back to Diane. Are there any other further comments about Diane? I am not seeing anything.

Okay, great. Regarding Diane, I think the comments we heard were right on. This is a person in terms of where she wants to go. It is well-defined because she has that as an IEP goal. I was saying, where do we go now? What is available? Even trimming down this idea of working in an animal shelter more, you know. It was mentioned maybe there's a zoo. Maybe there is another type of facility that works with animals that she would be interested in. So, it is really about beginning to move to action with Diane, getting her to start looking for specific places of employment, and hopefully developing interviews for those places.

And it was a great story. A similar event happened to a real individual, and so cool that they found employment and they are doing so well. I get goosebumps anytime I hear that someone is doing so well, given their efforts and the wonderful services they got through you all as HVRP providers.

[Next Slide]: So, are there any other questions or feedback? And as you can see in the chat, there is an evaluation form that we would love you to fill out about today. But before we leave, any other questions/comments that you have about today's presentation? And while we are waiting for any other questions or feedback, our next virtual learning course will be on Tuesday, where we are talking about IEP skills and training development. Also, next Thursday, we will be talking about retention post-placement. So hopefully you will join us. Please contact us if you need any support from us at contact at NVTAC dot org.

I really appreciated the great discussion. Today, you are all wonderful. Let us keep getting veterans employed. It is going to end their homelessness. I am speechless when I think about how valuable this work you are doing is and how you are improving the lives every day of the

Oh, I'm sorry, there is a hand raised.

- [Participant]: I just wanted to say thank you again for today's session. It was fantastic. I got a lot of reassurance and understanding of a few things that I need to work on as well as some things that have been reiterated that yeah, okay, we are doing the right thing. Like I said, it is time and effort that you are willing to put into your clients. It is having no attitude. Showing your clients that you are willing to bend over backwards to do what they need to do. What you need to do for them, but also instilling that in them as well. At the same time, getting them to understand that if you bend over a little bit, and it helps, hope that other people are willing to jump out there and help you as well. Things will be coming for you on the good side instead of the lesser side.

- [Steve]: Absolutely! Thank you for that. Thank you for your comments today. I really appreciated it. For those who are still on, this is hard work. So be mindful of yourself. Self-care in this field for people doing counseling/case management work is so key. So be aware of that. Take care of yourselves. This can often be a challenging process. I just want to throw that out there to everyone. I will also say for those of you still on, all of these trainings that we are doing will be posted to the NVTAC website with the recordings. So, you will have them there for your future reference. We will close out here.