

IMPROVING DEMAND-DRIVEN SERVICES
AND PERFORMANCE:

**TRAINING GUIDE FOR EFFECTIVE
FRONT-LINE SERVICES
TO YOUTH**



www.doleta.gov/youth_services

SPRING 2007



TRAINING MODULE INTRODUCTION

PREPARING YOUTH IN A DEMAND-DRIVEN ECONOMY

Training Methodology: PowerPoint

Time: 15 minutes

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- The Manual

PowerPoint Slides:

- Slide 1: Introduction – Preparing Youth in a Demand-Driven Economy
- Slide 2: Strategic Vision for the Delivery of Youth Services
- Slide 3: Emphasizing the Need for successful Case Management Strategies
- Slide 4: Development of the Toolkit
- Slide 5: The Manual as a Resource
- Slide 6: Toolkit is for Front-line Workers
- Slide 7: Modules One and Two
- Slide 8: Modules Three and Four
- Slide 9: Modules Five and Six
- Slide 10: Modules Seven and Eight
- Slide 11: Training Time
- Slide 12: Topics Covered by the Toolkit

Suggested Training Outline:

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none">• Introduction to the toolkit slide presentation (if required)	<ul style="list-style-type: none">– Hard copies of slides– Hard copies of the Manual
Total expected training time: 15 minutes or less		



TRAINING MODULE INTRODUCTION PREPARING YOUTH IN A DEMAND-DRIVEN ECONOMY

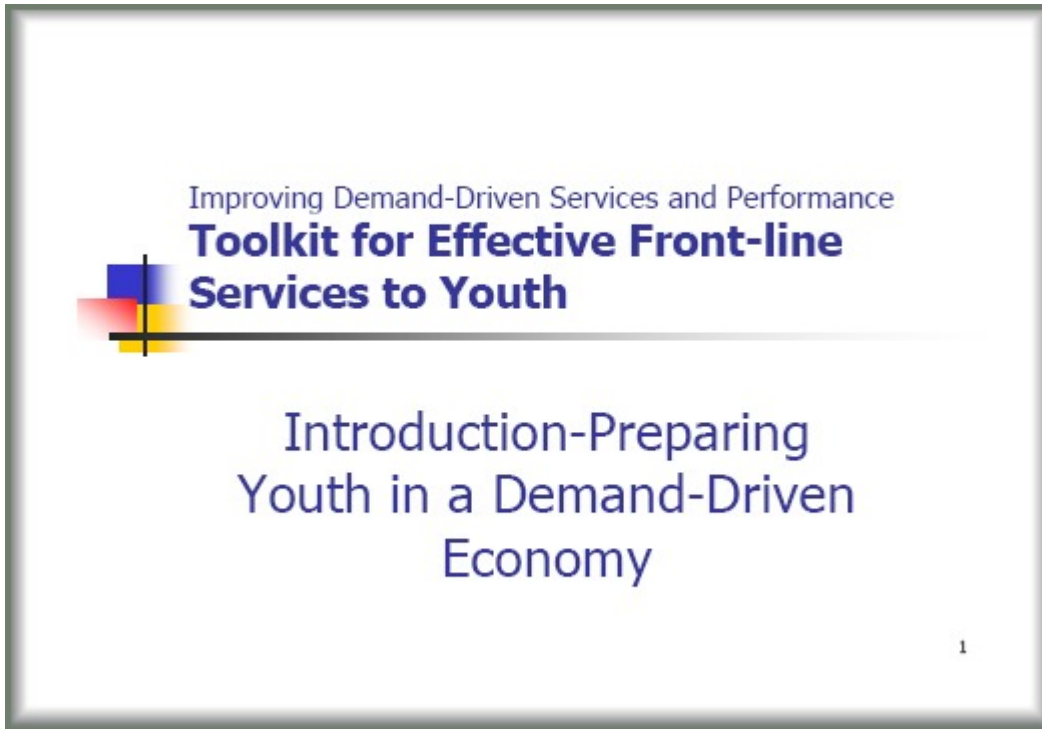
This brief, 15 minutes or less, presentation describes the development of the Toolkit, the content and how it can be used. Trainers are expected to present the introduction prior to Module One and prior to any of the other modules whenever there are a significant number of participants who have not heard it before. If time is a factor, trainers can also refer participants to the Introduction in the Manual and ask them to read it for themselves. Please review the Introduction in the Manual before presenting it.

Introduction Objectives:

- To understand the purpose of the Toolkit and the focus on disconnected, at-risk youth;
- To appreciate the Manual and Toolkit as a multipurpose resource for improving services to youth;
- To know the contents of the Manual and the accompanying tools.



Module Introduction Slide 1:




Notes

- Trainer see [Training Methodology](#)
- Trainer see [Materials/PowerPoint Slides List](#)
- Trainer See [Suggested Training Outline](#)



Module Introduction Slide 2:



Preparing Youth for Employment in a Demand-Driven Economy:

- ETA's *Strategic Vision for the Delivery of Youth Services* under the Workforce Investment Act is committed to implementing a system that reaches out to the neediest of our youth.
- Organizations providing workforce development services to youth must employ strategies that assist these youth in developing the necessary skills required for success in the workplace.

2

Notes:

Stress that participants should be familiar with Training and Employment Guidance Letter No. 28-05, ETA's *Strategic Vision for the Delivery of Youth Services* which informs states and local areas of ETA's focus on serving out-of-school youth and at-risk youth under the Workforce Investment Act.



Module Introduction Slide 3:

Preparing Youth for Employment in a Demand-Driven Economy:

- This toolkit will assist Front-line and administrative staff of youth-serving organizations to design and implement an efficient approach to service delivery.
- Successful case management initiatives incorporate a number of fairly standard steps that allow the process to be orderly and structured.


3

Notes:

Explain that this Toolkit emphasizes the need for organizations to deliver services within the context of successful case management strategies.



Module Introduction Slide 4:

 **The Manual & the Training Tools**

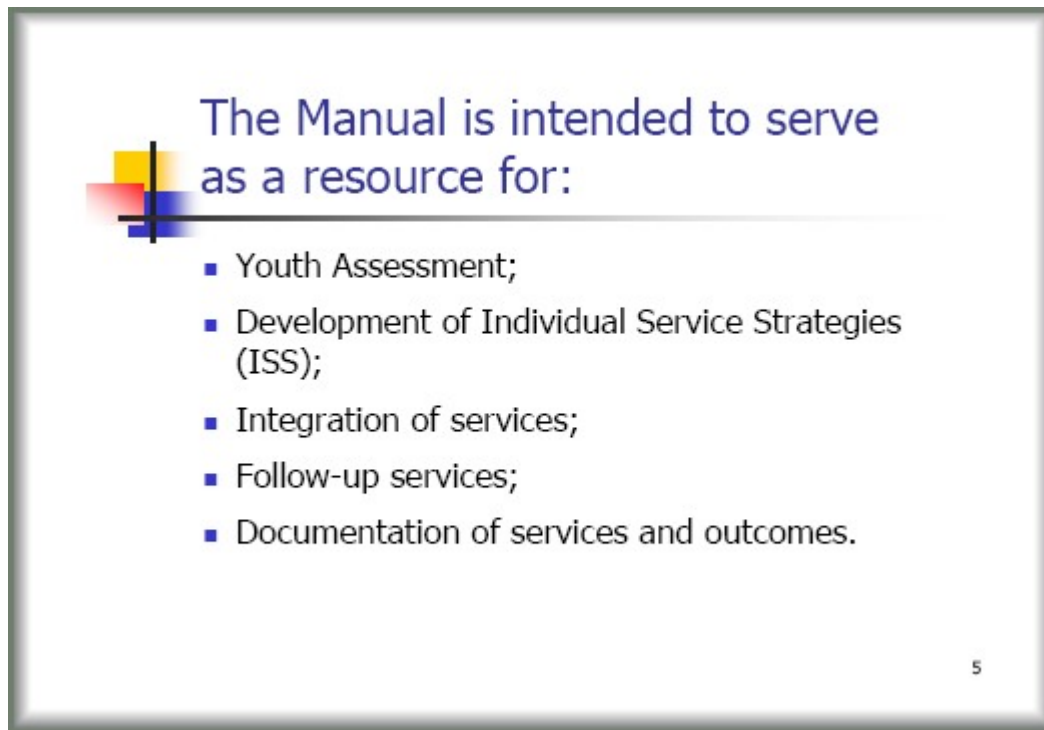
- Prepared by a national team of youth specialists, trainers, and program experts.
- Focused on youth who have become disconnected from mainstream institutions and systems.

4

Notes:

Explain that the Toolkit was developed with input from a variety of individuals, including beta-testing utilizing trainers and front-line workers from states and local areas. Although the material presented could be adapted for any cohort of youth, the concept of providing serves to the neediest youth is a common thread throughout the Toolkit.

Module Introduction Slide 5:

A presentation slide with a white background and a grey border. On the left side, there is a decorative graphic consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The main text is in a dark blue font. The title reads "The Manual is intended to serve as a resource for:". Below the title is a horizontal line. Underneath the line is a bulleted list with five items, each preceded by a blue square bullet. The items are: "Youth Assessment;", "Development of Individual Service Strategies (ISS);", "Integration of services;", "Follow-up services;", and "Documentation of services and outcomes.". In the bottom right corner of the slide, the number "5" is displayed.

The Manual is intended to serve as a resource for:

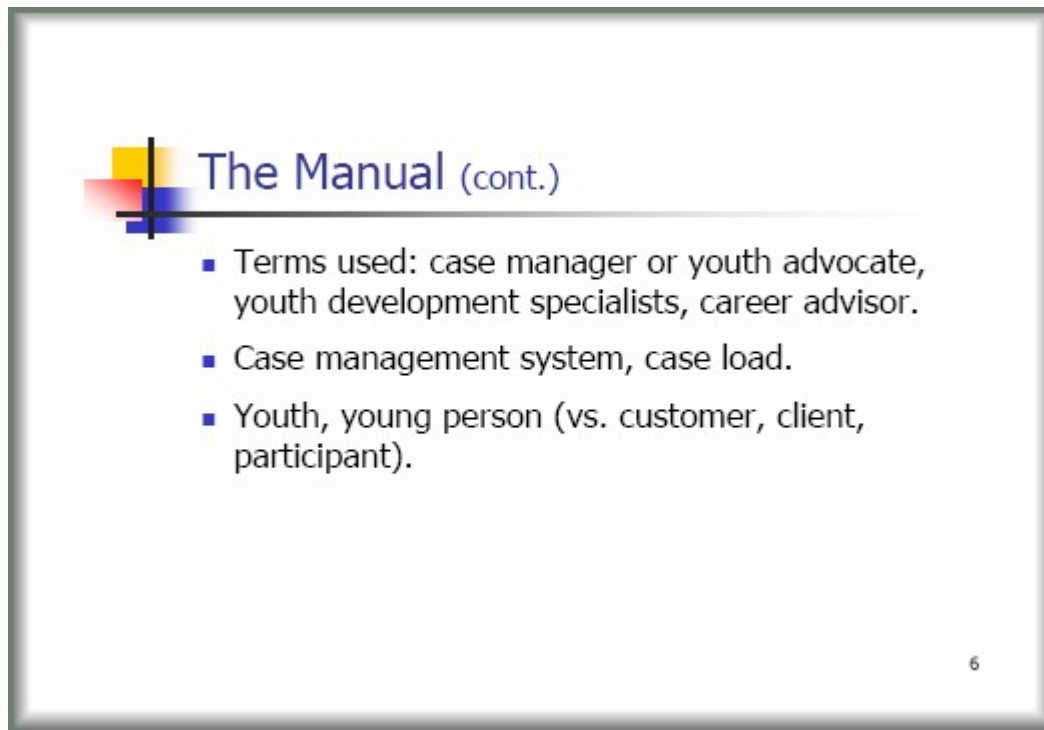
- Youth Assessment;
- Development of Individual Service Strategies (ISS);
- Integration of services;
- Follow-up services;
- Documentation of services and outcomes.

5

Notes:

1. Explain that the Manual is organized for either selective use of the topics or for a more comprehensive approach.
2. Review intentions on the slide

Module Introduction Slide 6:



The Manual (cont.)

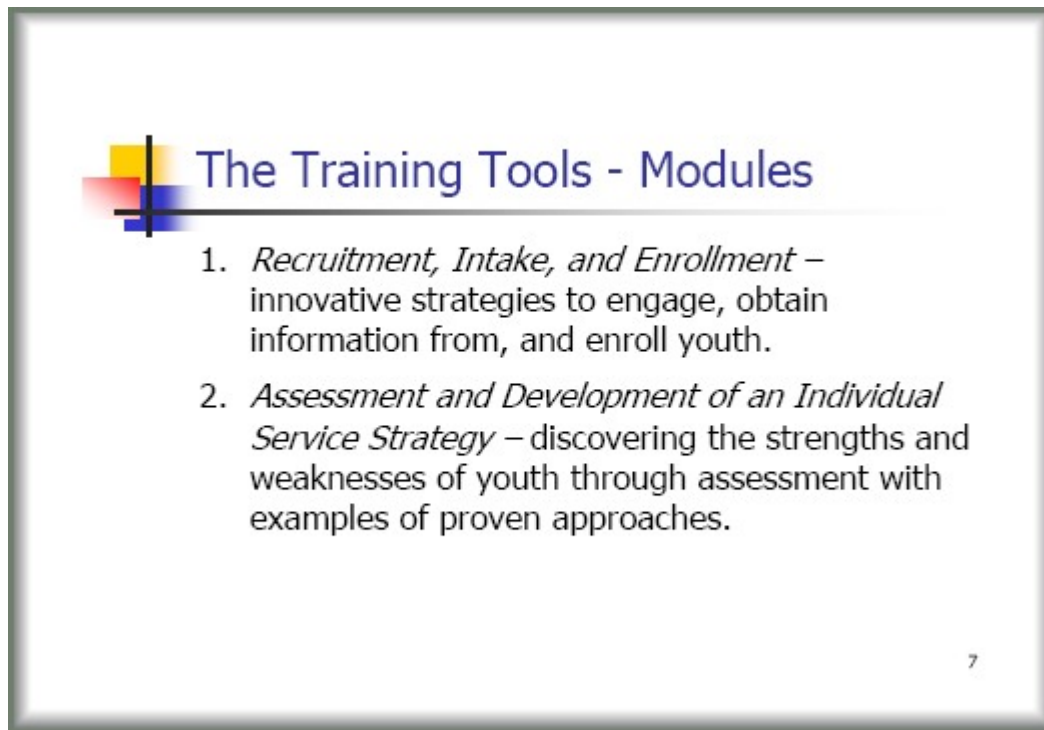
- Terms used: case manager or youth advocate, youth development specialists, career advisor.
- Case management system, case load.
- Youth, young person (vs. customer, client, participant).


6

Notes:

1. Review the different terms frequently used to describe professionals working with youth.
2. Point out that this Toolkit is primarily for front-line workers and the administrators responsible for service delivery.

Module Introduction Slide 7:



 **The Training Tools - Modules**

1. *Recruitment, Intake, and Enrollment* – innovative strategies to engage, obtain information from, and enroll youth.
2. *Assessment and Development of an Individual Service Strategy* – discovering the strengths and weaknesses of youth through assessment with examples of proven approaches.


7

Notes:

1. Note that the following slides provide brief descriptions of each of the EIGHT topics/chapters.
2. Remind audience that each “segment” are called Chapters in the Manual and Modules in the Training Slides and Training Guide.
3. Review #1 and #2 on slide.



Module Introduction Slide 8:

 **The Training Tools - Modules** (cont.)

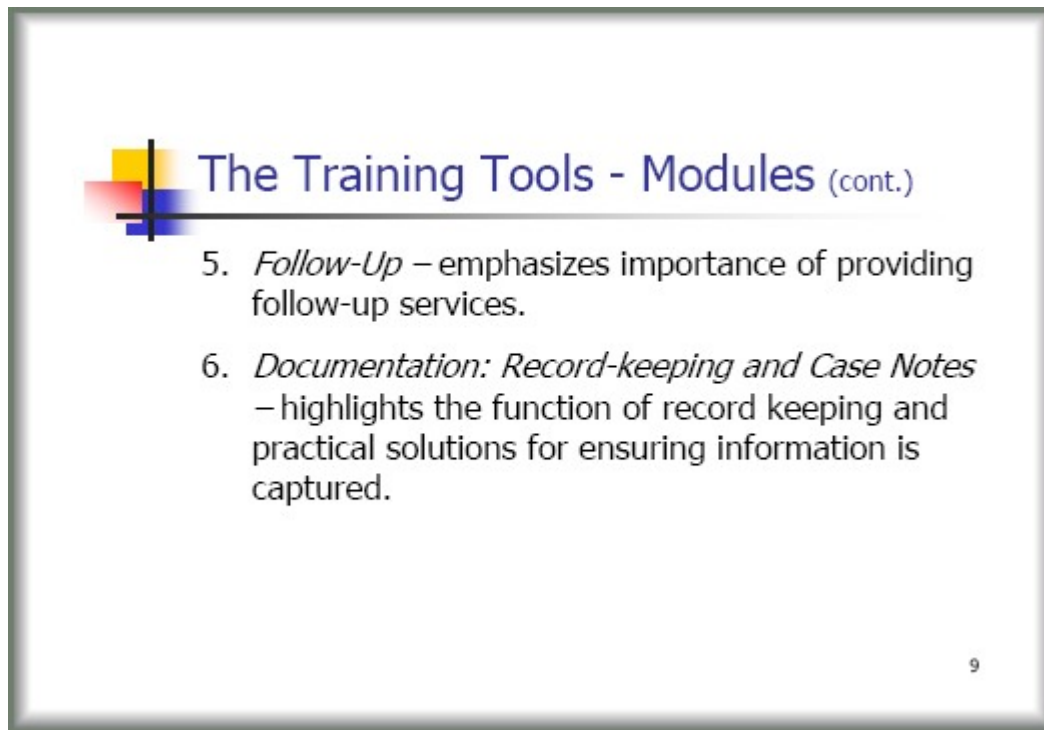
4. *Meeting the Needs of the Labor Market* – the relevance of including Labor Market information in choosing career pathways and services strategies.
5. *Implementing the Case Plan/ISS* – how to turn the ISS into a living document.

8

Notes:

1. Review #3 and #4 on slide.
2. Training sessions can be adapted to the needs of groups of training participants.

Module Introduction Slide 9:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title "The Training Tools - Modules (cont.)" is positioned to the right of this graphic. Below the title, two numbered list items are presented. The first item, "5. Follow-Up", describes the importance of follow-up services. The second item, "6. Documentation: Record-keeping and Case Notes", describes the function of record keeping and practical solutions for information capture. A small number "9" is located in the bottom right corner of the slide frame.

The Training Tools - Modules (cont.)

5. *Follow-Up* – emphasizes importance of providing follow-up services.
6. *Documentation: Record-keeping and Case Notes* – highlights the function of record keeping and practical solutions for ensuring information is captured.

9

Notes:

1. Review #5 and #6 on slide.
2. Decisions may be made as to the order in which each module is presented based on the need of youth professionals within any organization.



Module Introduction Slide 10:

A slide with a white background and a grey border. On the left side, there is a graphic consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. To the right of the graphic is the title "The Training Tools - Modules (cont.)" in a blue serif font. Below the title is a horizontal line. Underneath the line are two numbered items in a black serif font. Item 7 is "7. *Evaluation/Measuring Outcomes* – underscores the importance of measuring results." Item 8 is "8. *Engaging Employers: Making the Connection*– linking youth with future jobs." In the bottom right corner of the slide, the number "10" is displayed.

The Training Tools - Modules (cont.)

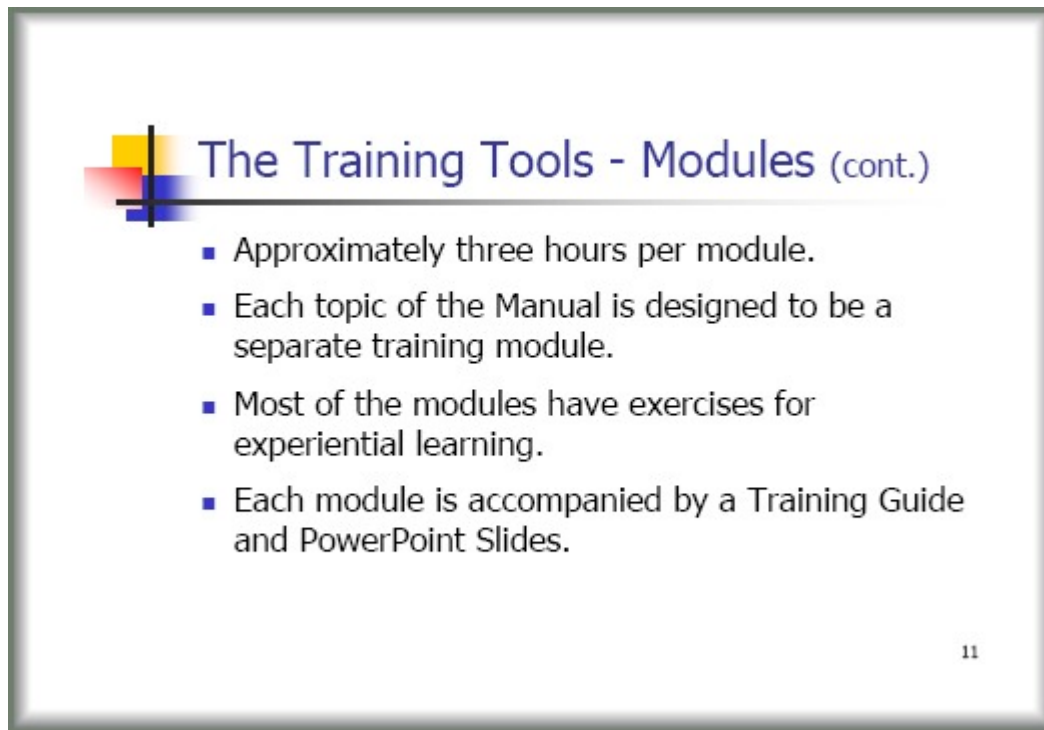
7. *Evaluation/Measuring Outcomes* – underscores the importance of measuring results.
8. *Engaging Employers: Making the Connection*– linking youth with future jobs.

10

Notes:

Review #7 and #8 on slide

Module Introduction Slide 11:



The Training Tools - Modules (cont.)

- Approximately three hours per module.
- Each topic of the Manual is designed to be a separate training module.
- Most of the modules have exercises for experiential learning.
- Each module is accompanied by a Training Guide and PowerPoint Slides.

11

Notes:

Explain that each module can take up to three hours depending on the number of participants and how lengthy discussions might be. Some modules may take less time.



Module Introduction Slide 12:

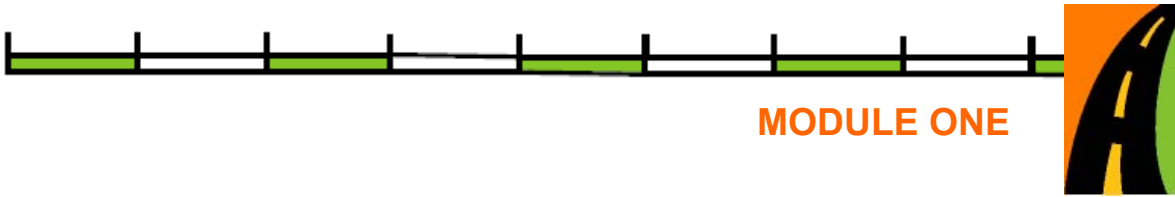
 **Case Management Components**

- Recruiting, pre-screening, intake and enrollment;
- Addressing skills, abilities and labor market needs;
- Planning;
- Implementing and monitoring;
- Follow-up;
- Evaluating.

12

Notes:

Explain that the Toolkit will cover these specific topics with additional information and examples in the Appendices.



MODULE ONE

RECRUITMENT, INTAKE & ENROLLMENT

Training Methodology: PowerPoint, large and small group work

Time: 3 hours

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- The Manual
- Module One Exercise handouts:
 - a. Recruiting Out-of-School Youth instructions
 - b. Recruiting In-School Youth instructions
 - c. Connecting with Young People instructions

PowerPoint Slides:

- Slide 1: Module One Recruitment, Intake, and Enrollment
- Slide 2: Module One Objectives
- Slide 3: Why Recruitment May be needed
- Slide 4: Recruiting Out-of-School Youth
- Slide 5: Recruiting In-School-Youth
- Slide 6: Improving Recruitment
- Slide 7: Pre-Screening, Intake, and Enrollment
- Slide 8: Stress the Following Points
- Slide 9: Establish Rapport



Suggested Training Outline:

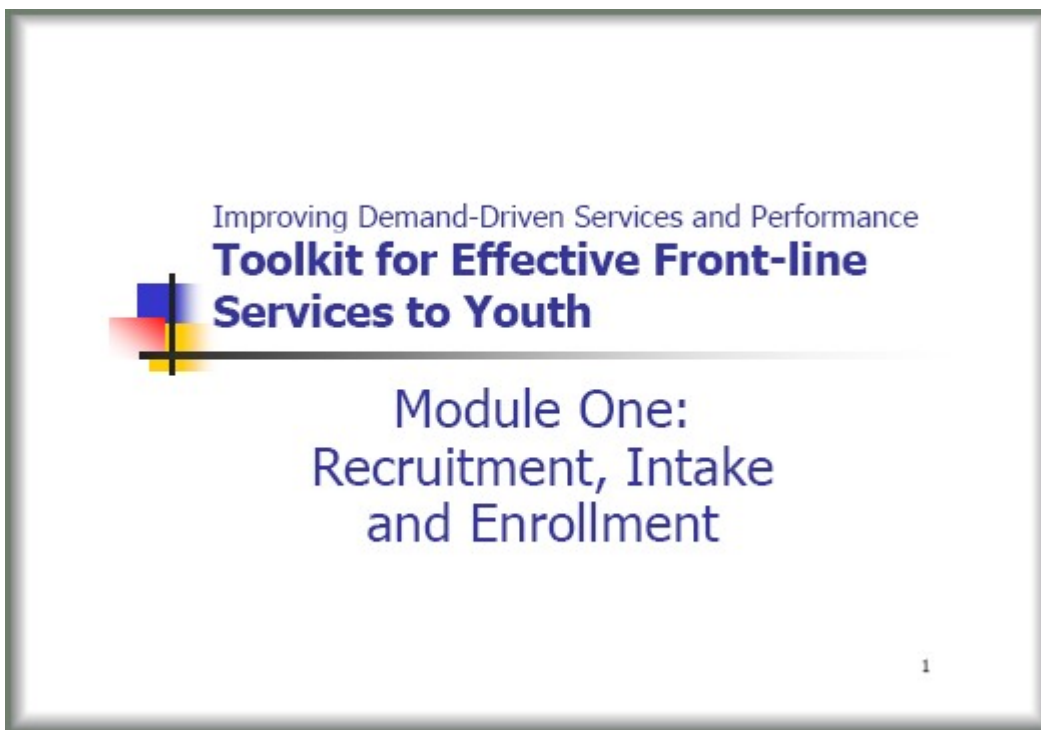
Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
15 Minutes	<ul style="list-style-type: none"> • Module One present slides 1-4 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise I Recruiting Out-of-School Youth <ul style="list-style-type: none"> – Form 4 groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise Instructions – Chapter One of the Manual
20 Minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Flipcharts & markers
20 Minutes	<ul style="list-style-type: none"> • Group reports Exercise I 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
5 Minutes	<ul style="list-style-type: none"> • Module One: slides 5 & 6 Recruiting In-School Youth 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of Manual
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise II Recruiting Locations <ul style="list-style-type: none"> – 4 groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise Instructions
15 Minutes	<ul style="list-style-type: none"> • Conduct Exercise II 	<ul style="list-style-type: none"> – Flipcharts & markers
20 Minutes	<ul style="list-style-type: none"> • Group reports Exercise II 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 Minutes	<ul style="list-style-type: none"> • Module Two – present slides 7-9 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
10 Minutes	(Suggested activities & Materials) <ul style="list-style-type: none"> • Close Module Two <ul style="list-style-type: none"> – Feedback on today – Next module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
<p>Total expected training time: 3 hours +/-</p>		

MODULE ONE RECRUITMENT, INTAKE & ENROLLMENT

From recruitment and intake through enrollment, this module reminds case managers that multiple people may be involved with the young person and that it is important that the process is experienced as seamless by the participant.

The focus is on youth friendly attitudes and activities vs. just filling in the required forms. Additionally, there is an emphasis on establishing a partnership with youth so that they understand that they need to do the work.

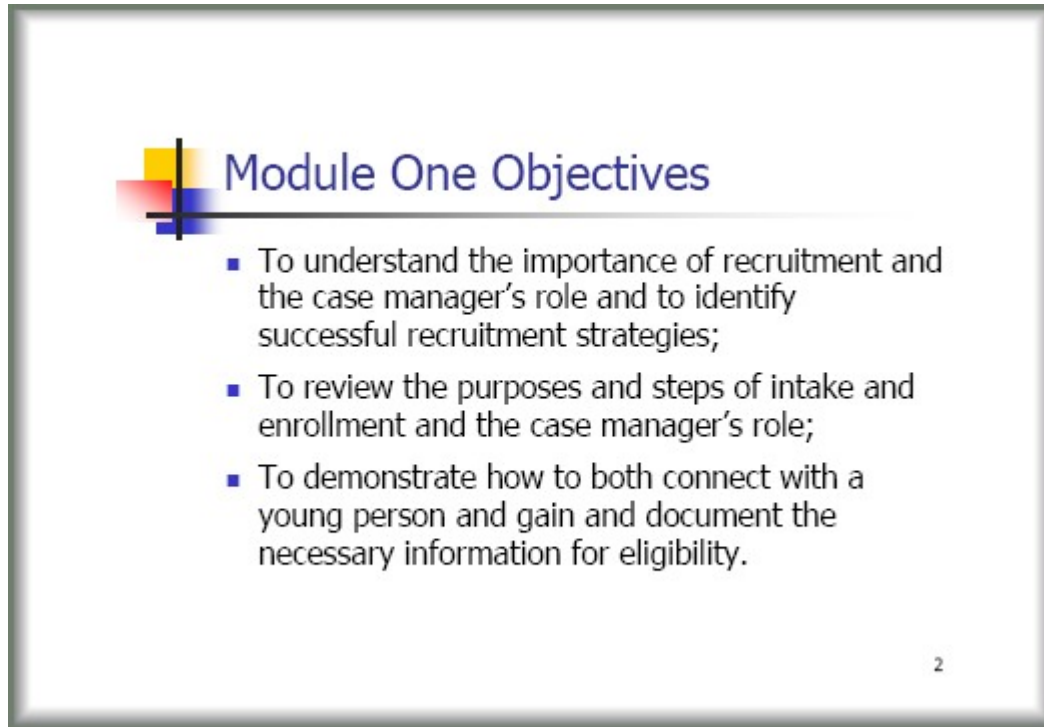
Module One Slide 1:



Notes:

- Trainer See [Training Methodology](#)
- Trainer See [Materials/PowerPoint Slides List](#)
- Trainer See [Suggested Training Outline](#)

Module One Slide 2:

A presentation slide titled "Module One Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide contains three bullet points and a page number "2" in the bottom right corner.

Module One Objectives

- To understand the importance of recruitment and the case manager's role and to identify successful recruitment strategies;
- To review the purposes and steps of intake and enrollment and the case manager's role;
- To demonstrate how to both connect with a young person and gain and document the necessary information for eligibility.

2

Notes:

Review the Objectives of Module One.

Module One Slide 3:



Recruitment: Why Recruitment May Be Needed

- It may be the youth's first contact with a community-based employment program.
- To overcome external, psychological and cultural barriers to youth participation in employment and training programs.

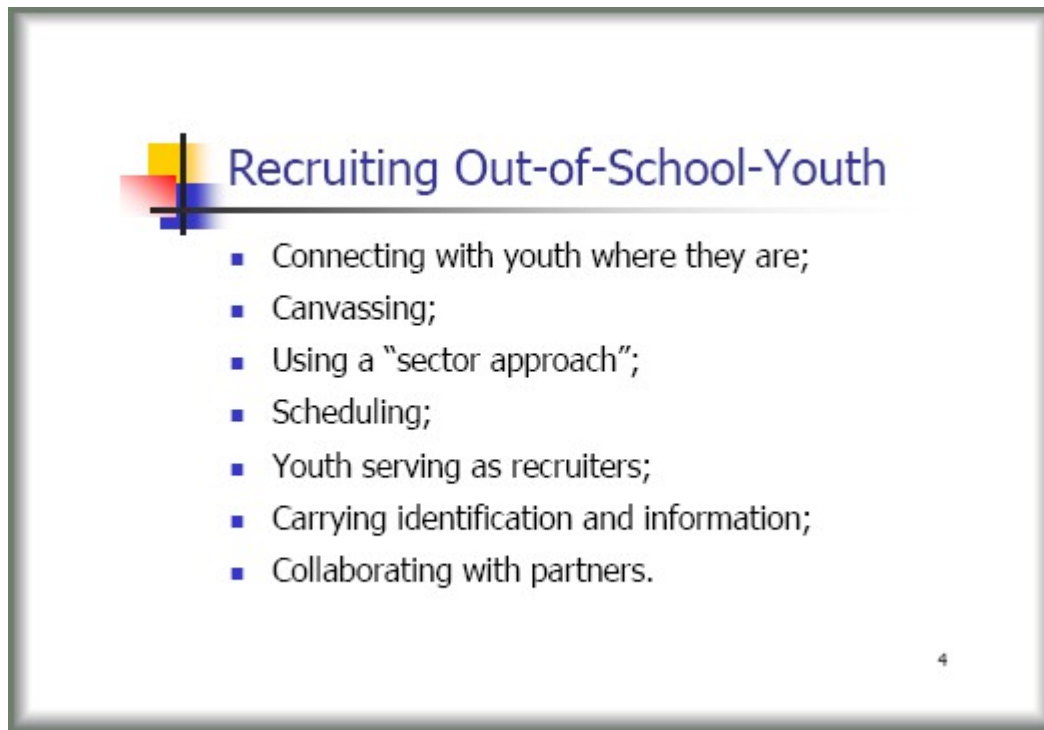
Case managers may be responsible for recruitment and will need to integrate the youth into the whole process, creating a partnership between recruiters, case managers, and job developers.

3

Notes:

1. Emphasize that recruiters must understand their partnership with case managers and job developers and be honest with youth regarding the work they'll have to do to reach their ultimate goal of long term employability.
2. It may be all new to a young person (service agency, work, contracting). A recruiter gives information based upon need and truth. The youth need to learn enough to be interested in being part of the program and there should be no tricks to get them in.
3. New participants need to understand that the recruiter may not be the primary person with whom they are working. However, the recruiter also needs to assess whether this participant will need them to be with them when they initially go to the center to ease the process.
4. Encourage workers to talk with youth to understand potential barriers, including subtle ones (i.e.-the youth is gay or threatened by gangs) that might impede their following through on the intake process.

Module One Slide 4:



The slide features a title 'Recruiting Out-of-School-Youth' in a blue serif font, preceded by a graphic of overlapping yellow, red, and blue squares. Below the title is a bulleted list of seven strategies. The slide is numbered '4' in the bottom right corner.

- Connecting with youth where they are;
- Canvassing;
- Using a “sector approach”;
- Scheduling;
- Youth serving as recruiters;
- Carrying identification and information;
- Collaborating with partners.

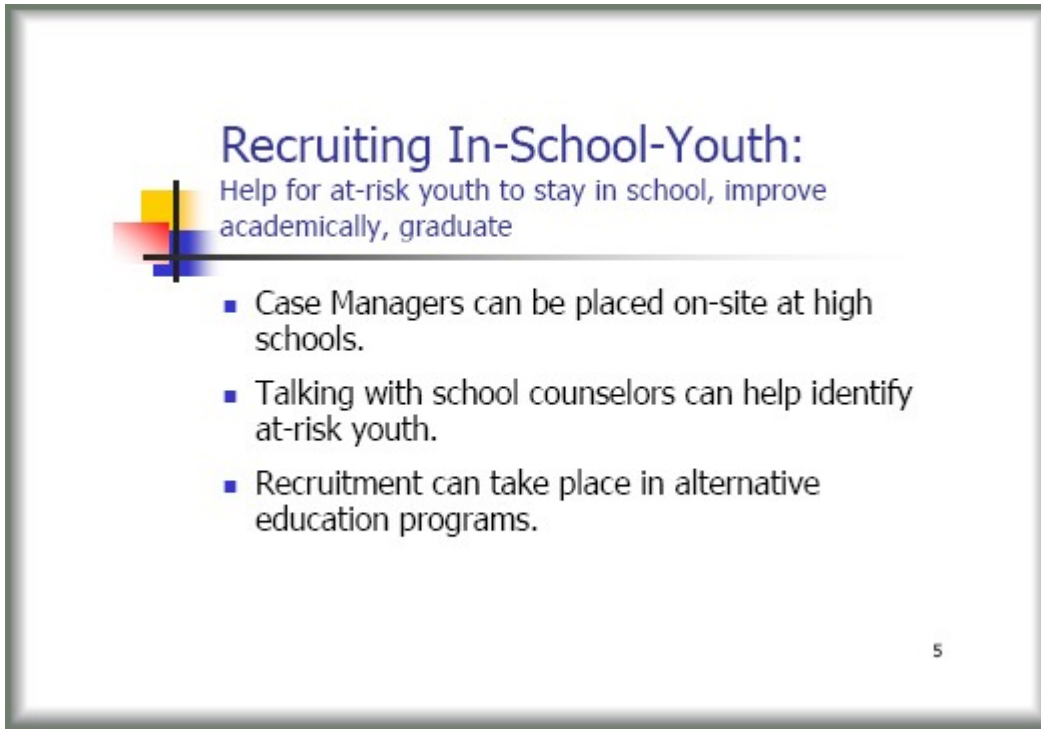
Notes:

1. Briefly describe the seven approaches for recruiting out-of-school youth.
2. If time allows, ask trainees for examples of ways they’ve used the various approaches and how they have worked for them (or go directly to Exercise I).
3. Tell the group they will be doing an exercise using this numbered list from the Toolkit Manual.

TRAINER STOP

**CONDUCT MODULE ONE, EXERCISE I:
RECRUITING OUT-OF-SCHOOL YOUTH**

Module One Slide 5:



Recruiting In-School-Youth:
Help for at-risk youth to stay in school, improve academically, graduate

- Case Managers can be placed on-site at high schools.
- Talking with school counselors can help identify at-risk youth.
- Recruitment can take place in alternative education programs.

5

Notes:

1. Review the mix of activities on the slide, then:
2. Ask for specific examples of activities they have used.
3. Check that they group understands how to do various activities.

Module One Slide 6:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Improving Recruitment' is centered at the top in a blue font. Below the title is a list of six bullet points, each starting with a blue square. The slide number '6' is located in the bottom right corner.

Improving Recruitment

- Review and collect data
 - "How did you hear about the program?"
- What basic info collected from youth?
- Is info necessary for follow-up collected?
- How is info used to plan programs and activities?
- Questions youth and parents most frequently ask?
- How are youth participants involved in outreach and recruitment?

6

Notes:

1. Explain that the list of questions on the Improving Recruitment slide works as an internal check on the quality of recruitment activities.
2. Point out that these questions should be asked of and answered by individual recruiters and the recruitment department as a whole, regularly and consistently.

TRAINER STOP

CONDUCT MODULE ONE, EXERCISE II

Module One Slide 7:

Pre-screening, Intake and Enrollment

Purposes:

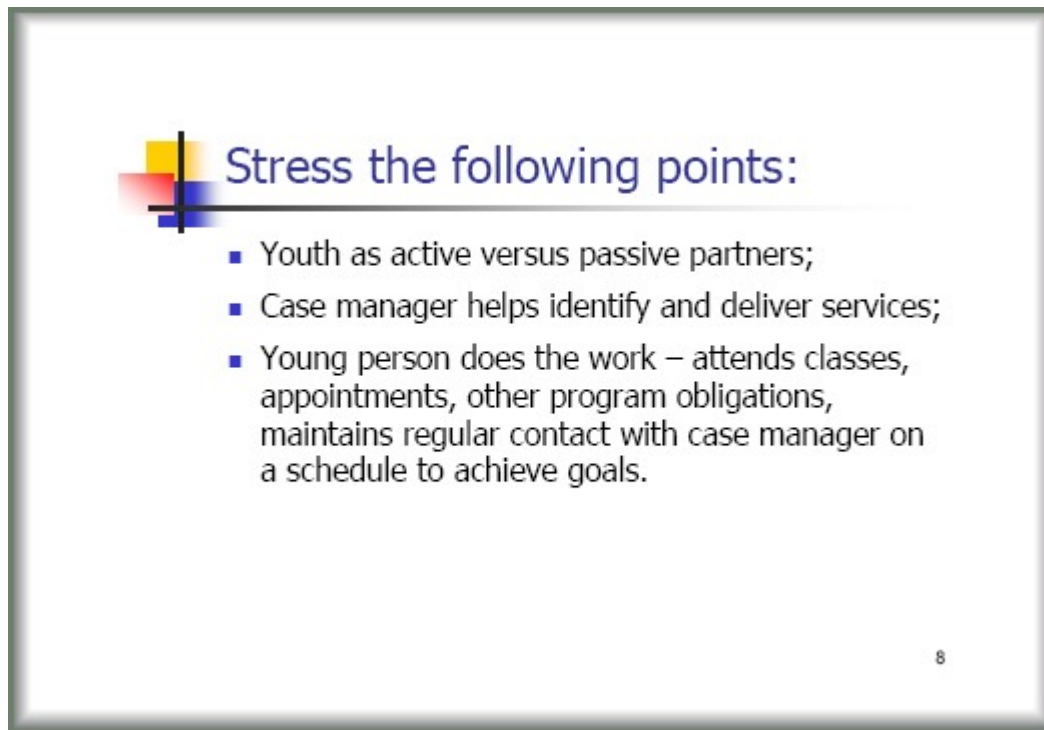
- Determine eligibility.
- Collect core information – only what’s needed – not more.
- Orient to program and expectations.
- Not just filling in forms.

7

Notes:

1. Review the purposes of pre-screening, intake and enrollment
2. Explain that it is important that they engage young people in the process and not engage them in completing the forms.
3. Tell training participants that this is an important part of orientation for the new youth participant and must be treated as such. Beginnings impact endings.

Module One Slide 8:

A presentation slide with a white background and a grey border. At the top left, there is a decorative graphic consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. To the right of this graphic, the text "Stress the following points:" is written in a blue, sans-serif font. Below this text, there is a bulleted list with three items, each preceded by a blue square bullet. The list items are: "Youth as active versus passive partners;", "Case manager helps identify and deliver services;", and "Young person does the work – attends classes, appointments, other program obligations, maintains regular contact with case manager on a schedule to achieve goals." In the bottom right corner of the slide, the number "8" is displayed in a small, grey font.

Stress the following points:

- Youth as active versus passive partners;
- Case manager helps identify and deliver services;
- Young person does the work – attends classes, appointments, other program obligations, maintains regular contact with case manager on a schedule to achieve goals.

8

Notes:

1. Discuss again the importance of the partnership between recruiters/intake workers, case managers and job developers.
2. Point out that this is an important time to set expectations with the youth for a high level of involvement in the program and to take responsibility for their own lives.
3. Point out that they should not talk about what the case manager is going to do **for** them, but rather with them.

Module One Slide 9:



Establish Rapport

- May be more than one appointment – each starting with small talk.
- Time for youth to relax – be comfortable.
- Intake is an opportunity to get to know each other - to establish on-going relationship.
- Determine goals, areas of success, barriers to achieving goals.

9

Notes:

1. Review the points for establishing rapport
2. Encourage the training participants to discuss what they believe to be the strong points of their recruitment/intake process. Ask if there are any ways they could improve their own recruitment process to make it more than just selling to youth or just processing them.



TRAINING INSTRUCTIONS: MODULE ONE

EXERCISE I OVERVIEW



Training Instruction:

Conduct Exercise I following the presentation of slides 1-4
approximate times:

- 10 minutes to prepare for exercise
- 20 minutes to conduct
- 20 minutes for group reports
- 10 minutes for whole group discussion.

Exercise Overview:

The objectives of this exercise are for trainees to learn/practice:

- The seven broad strategies described for reaching out-of-school youth;
- To expand the range of approaches by drawing on their own and others' experiences.

Participant Materials:

- Module One, Exercise I instructions
- Chapter One of the Manual;
- Flip chart paper and markers.



TRAINING INSTRUCTIONS: MODULE ONE

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into four groups; • Give all groups the Exercise Instructions handout; • Direct each group to the Note at the beginning of their exercise instructions to place the exercise in context; • Make the assignments for the strategies in Chapter One of the Manual: <p>Group 1: Strategies 1-3</p> <p>Group 2: Strategies 4-6</p> <p>Group 3: Review strategy 7 and the top half of the examples</p> <p>Group 4: Review strategy 7 and the bottom half of the examples</p> <p>As groups are reporting out at the end of the exercise, listen for the kinds of ideas listed under Training Notes.</p> <p>After groups report out, take a few minutes to:</p> <ul style="list-style-type: none"> • Ask the participants to summarize what points stand out to them from their discussion; • What they learned or refreshed themselves on from the exercise that they can apply in their work. 	<p>Groups can be as small as two people.</p> <p>You may read this aloud to the groups.</p> <p>Check with each group to be sure they understand their assignments and associated instructions.</p> <p>Sample Strategies:</p> <ol style="list-style-type: none"> 1. Connecting with youth where they are: <ul style="list-style-type: none"> • walk-ins to work source centers • Area high schools • Youth recruiting other youth (word-of-mouth) • Partners are doing recruiting 2. Canvassing: <ul style="list-style-type: none"> • Job fairs/brochures in community • Web sites 3. Using a “sector approach”: <ul style="list-style-type: none"> • Targeting specific high schools • Mass mailing to food stamp families 4. Scheduling: <ul style="list-style-type: none"> • Radio broadcast • Family-based/youth-based activities



	<p>5. Youth serving as recruiters:</p> <ul style="list-style-type: none">• Go where youth are hanging out• “Scholarship” nights• Bus station with transfer <p>6. Carrying identification and information:</p> <ul style="list-style-type: none">• IDs in general for schools <p>7. Collaborating with partners:</p> <ul style="list-style-type: none">• One-Stop partners• High school counselors• Stores where youth hang out (music, sports, fast food)• Faith-based organizations• Teen health centers.
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TRAINING INSTRUCTIONS: MODULE ONE

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Note: There are seven major strategies for reaching out-of-school youth in the Manual. The first six strategies can be implemented by individual workers; the seventh requires the collaboration of partner agencies. The purpose of this exercise is to review the strategies and expand the range of approaches.

Group 1: Review Strategies 1-3 in Chapter One of the Manual and:

- Give specific examples of activities that you are currently using for each strategy;
- Describe any problems you encounter with any of these strategies;
- Are there any gaps, that is, any strategy no one in your group has tried?

Group 2: Review strategies 4-6 in Chapter One of the Manual and:

- Give specific examples of activities that you are currently using for each strategy;
- Describe any problems you encounter with any of these strategies;
- Are there any gaps, that is, any strategy no one in your group has tried?

Groups 3 & 4: Review strategy 7 and the examples in chapter One of the manual and:

- Identify strategies that are currently being done and how they work;
- Are there any that no one is doing?

Note: Please select a recorder to capture the group's thinking on flipcharts and a reporter for a brief report to the whole group.

Time: 20 minutes for discussion; 5 minutes to present



TRAINING INSTRUCTIONS: MODULE ONE

EXERCISE II OVERVIEW

Training Instruction:

Following the presentation of slides 5-6 - approximate times:

- 10 minutes to prepare for exercise
- 15 minutes to conduct
- 20 minutes for group reports
- 10 minutes for whole group discussion.

Exercise Overview:

The objectives of this exercise are for trainees to:

- Think through approaches to recruitment – how to connect with young people to obtain and document accurate information for eligibility.
- Participant Materials:
- Module One Exercise II instructions;
- Flip chart paper and markers.



TRAINING INSTRUCTIONS: MODULE ONE

EXERCISE II

<p>Training Instructions:</p> <ol style="list-style-type: none"> 1. Participants can remain in the same four groups from Exercise I. 2. Give all groups the Exercise II Instructions handout. 3. Direct each group to the Note at the beginning of their exercise instructions to place the exercise in context. 4. Make the assignments for the Recruitment locations: <ul style="list-style-type: none"> Group 1: Recruiting in a Park Group 2: Recruiting in a shopping Mall Group 3: Recruiting in a Health Clinic Group 4: Recruiting in Movie Theater 5. As groups are reporting listen for the kinds of ideas listed under notes: 	<p>Training Notes:</p> <p>Groups can be as small as two people.</p> <p>You may read this aloud to the groups.</p> <p>Check with each group to be sure they understand their assignments and associated instructions.</p> <p>Recruiting in a Park:</p> <ol style="list-style-type: none"> 1. Flyers, next steps on flyers, what need to bring; 2. Athlete, artist, juggler, local DJ, musician; 3. Choose park likely to have eligible kids, make sure park is in disadvantaged community. 4. Shows up at next meeting. <p>Recruiting in a Shopping Mall:</p> <ol style="list-style-type: none"> 1. Food, drinks, free stuff, phone cards through "sponsorship". 2. Kiosk, computer, video games, T-shirts, job fair for youth; 3. All youth get jobs through One-Stop do WIA eligibility off site; 4. Get cell phones and email addresses if they have them.
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<p>6. After groups report out, take a few minutes to:</p> <ul style="list-style-type: none">- Ask the participants to summarize what points stand out to them from their discussion.- What they learned or refreshed themselves on from the exercise that they can apply in their work.- Are there other locations they can suggest?	<p>Recruiting in a Movie Theater:</p> <ol style="list-style-type: none">1. Incentives for visiting Center, movie passes; business cards, grocery gift certificates; other youth.2. Pre-movie advertisements, eye-catching signage;3. Ask questions; find their passion;4. Actually call/come/in; engage in conversation.
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TRAINING INSTRUCTIONS: MODULE ONE

PARTICIPANT HANDOUT #2

EXERCISE II INSTRUCTIONS FOR PARTICIPANTS

Note: Even if case managers don't do recruiting themselves, this exercise is intended to help them think about how it should be done. The focus is on connecting with young people and obtaining and documenting accurate information for eligibility.

Group 1: You are recruiting in a **Park**.

Group 2: You are recruiting in a **Shopping mall**.

Group 3: You are recruiting in a **Health Clinic**.

Group 4: You are recruiting in a **Movie Theater**.

For all locations:

1. What materials would you have or carry with you for this location?
2. What approach would you use to get a young person's attention?
3. How would you determine potential eligibility?
4. What are the indicators that you've successfully recruited this young person?

Note: Please select a recorder to capture the group's thinking. You may write directly on these exercise instructions. Be prepared for a brief report to the whole group.

Time: 15 minutes for discussion; 5 minutes to report.



ASSESSMENT

Training Methodology: PowerPoint, large and small group work

Time: 2 ½ - 3 hours

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- The Manual
 - a. Profiles of Kimberly & Clarence;
 - b. Conducting an Assessment Dialogue instructions.

PowerPoint Slides:

- Slide 1: Module Two-A Assessment
- Slide 2: Module Two-A Objectives
- Slide 3: About Assessment
- Slide 4: Principles of Effective Assessment
- Slide 5: Components of a Comprehensive, Objective Assessment
- Slide 6: Use a Variety of Methods and Tools
- Slide 7: Use Assessment Instruments that Measure
- Slide 8: Barriers to Employment and Need for Supportive Services
- Slide 9: Barriers, Continued
- Slide 10: Establishing Career Goals
- Slide 11: Informal/Formal Assessment Tools
- Slide 12: Formal Assessments
- Slide 13: Engaging Youth in the Assessment Process
- Slide 14: The Case Manager's Role

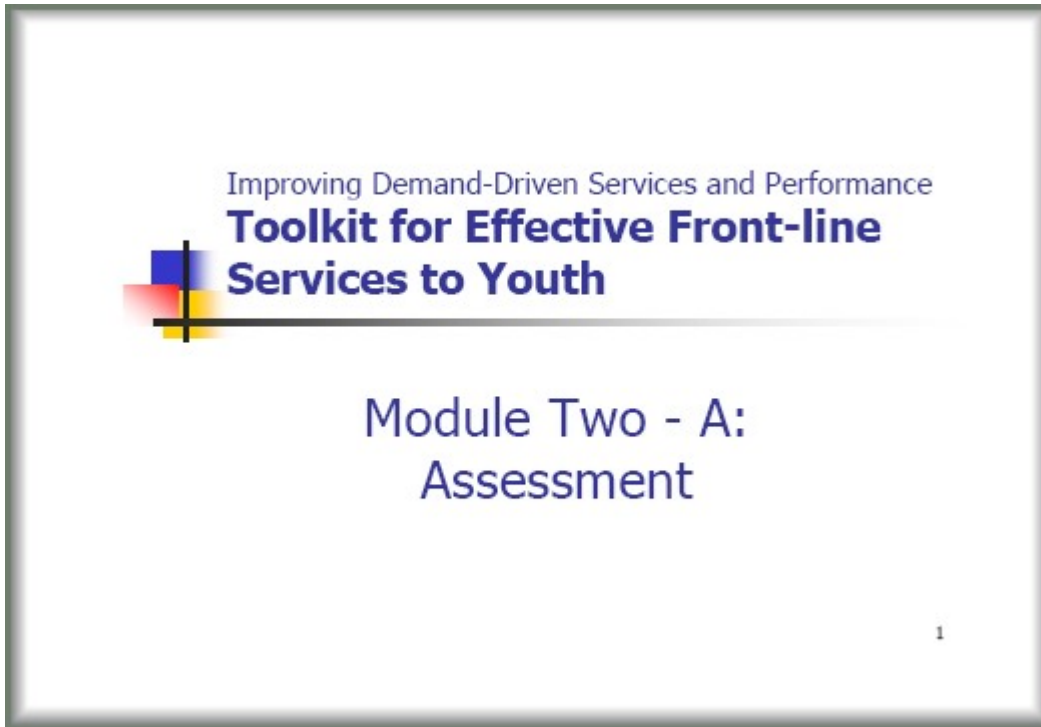


Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
30 Minutes	<ul style="list-style-type: none"> • Module Two-A presentation 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise I Conducting an Assessment dialogue: <ul style="list-style-type: none"> – Form Triads – Instruct Exercise 	<ul style="list-style-type: none"> – Exercise Instructions – Kimberly & Clarence profiles
1 hour	<ul style="list-style-type: none"> • Conduct Exercise I 	
10 Minutes	<ul style="list-style-type: none"> • Triad reports Exercise I 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 Minutes	<ul style="list-style-type: none"> • Feedback on today • Next Module sessions 	<ul style="list-style-type: none"> – Feedback form – Training Schedule
<p>Total expected training time: 2 ½ - 3 hours</p>		

MODULE TWO-A ASSESSMENT

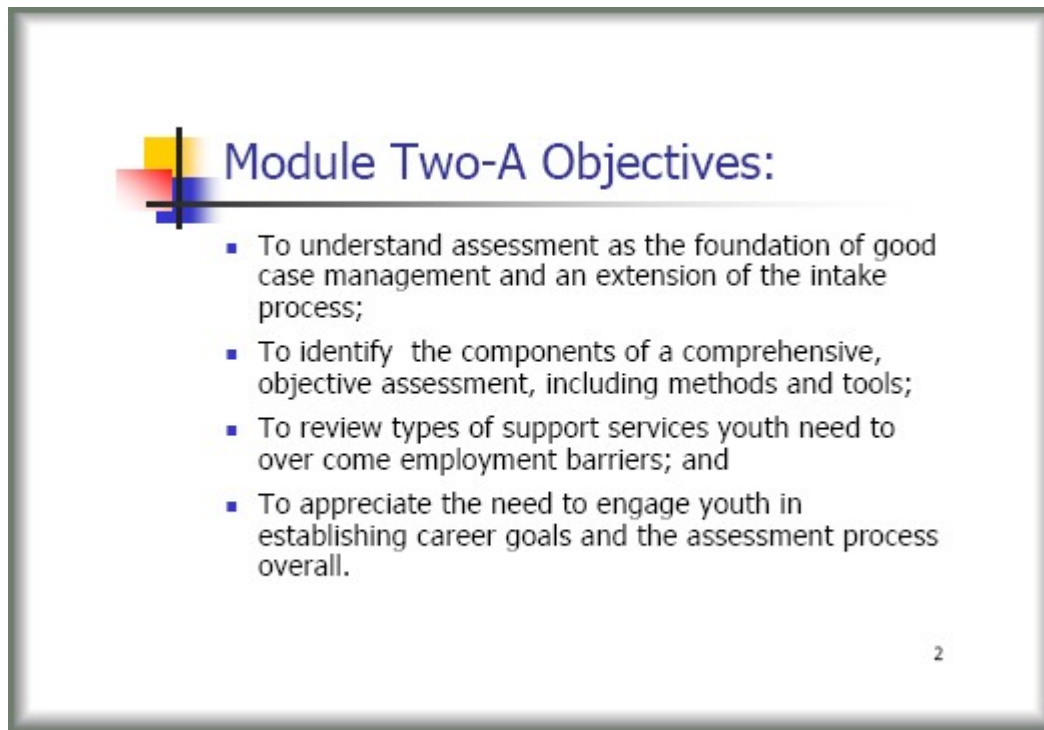
Module Two-A Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [Materials/PowerPoint Slides List](#)
- Trainer see [Suggested Training Outline](#)

Module Two-A Slide 2:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Module Two-A Objectives:' is in a dark blue font. Below the title is a bulleted list of four objectives. A small number '2' is located in the bottom right corner of the slide frame.

Module Two-A Objectives:

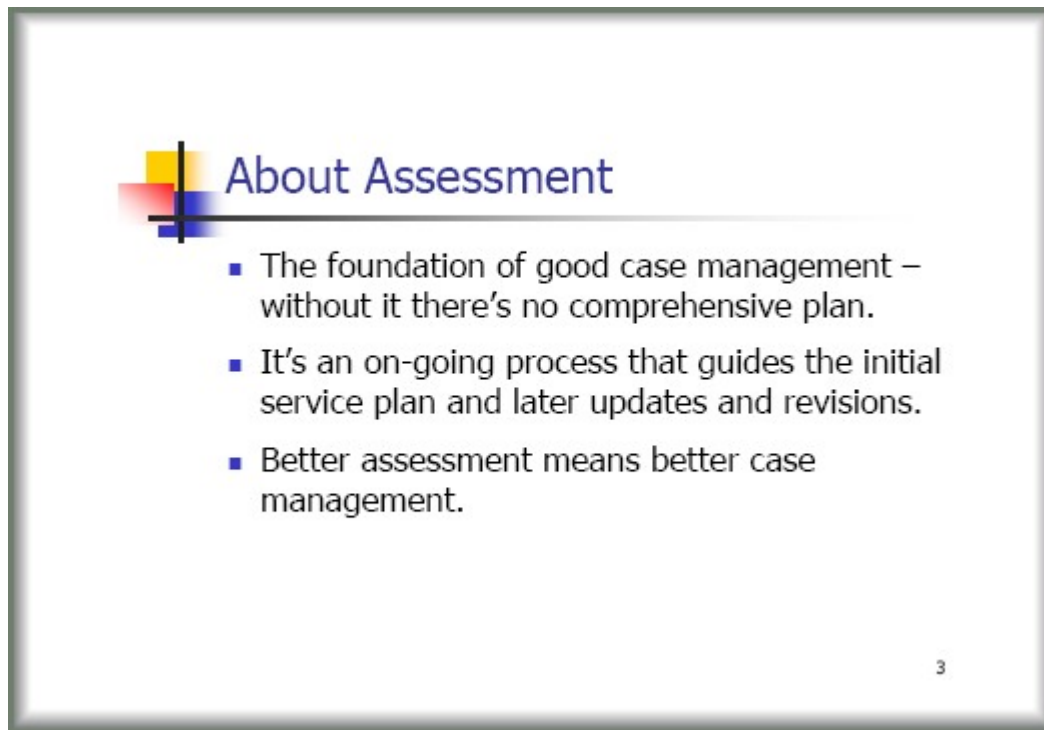
- To understand assessment as the foundation of good case management and an extension of the intake process;
- To identify the components of a comprehensive, objective assessment, including methods and tools;
- To review types of support services youth need to overcome employment barriers; and
- To appreciate the need to engage youth in establishing career goals and the assessment process overall.

2

Notes:

This two-three hour module presents the idea that better assessment equals better case management and is in fact the foundation for it. Without assessment, there is no comprehensive planning. Too often, plans don't reflect the data collected; it's intrusive to ask for information you know you won't use. There are principles to effective assessment and instruments with which case managers need to be familiar.

Module Two-A Slide 3:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'About Assessment' is in a blue serif font. Below the title is a horizontal line. Three bullet points are listed in a blue sans-serif font. The number '3' is in the bottom right corner.

About Assessment


- The foundation of good case management – without it there’s no comprehensive plan.
- It’s an on-going process that guides the initial service plan and later updates and revisions.
- Better assessment means better case management.


3

Notes:

1. Emphasize that case management is used when there are specific goals to achieve and usually the need for some type of individual change is indicated.
2. The assessment process is the way both the case manager and the youth know what specific goals are desired, what change(s) are necessary, what strengths exist to build upon, and what barriers might inhibit success.
3. The assessment phase also gives the case manager the information necessary to determine the range of services that will be needed and to begin the process of matching the individual with available services.

Module Two-A Slide 4:



 **Principles of Effective Assessment**

- Develop assessment strategy.
- Use comprehensive, exploratory approach.
- Make it an on-going process where progress can be measured.
- Use valid and reliable procedures and instruments.
- Administer instruments appropriately – no adverse affects on performance.
- Embed authentic assessments with program activities.

4

Notes:

1. Briefly review the principles for clarity and application.
2. Suggest that participants focus on the assessment process of their program and assess its adequacy in terms of these principles.
3. Within the limits of time, encourage a dialogue that explores whether: (1) approaches are comprehensive; (2) their instruments and procedures are valid and reliable; (3) the administration of various assessments (e.g. TABE testing) is conducive to high performance; and (4) how to embed authentic assessments into program activities.

Module Two-A Slide 5:

Components of a Comprehensive, Objective Assessment

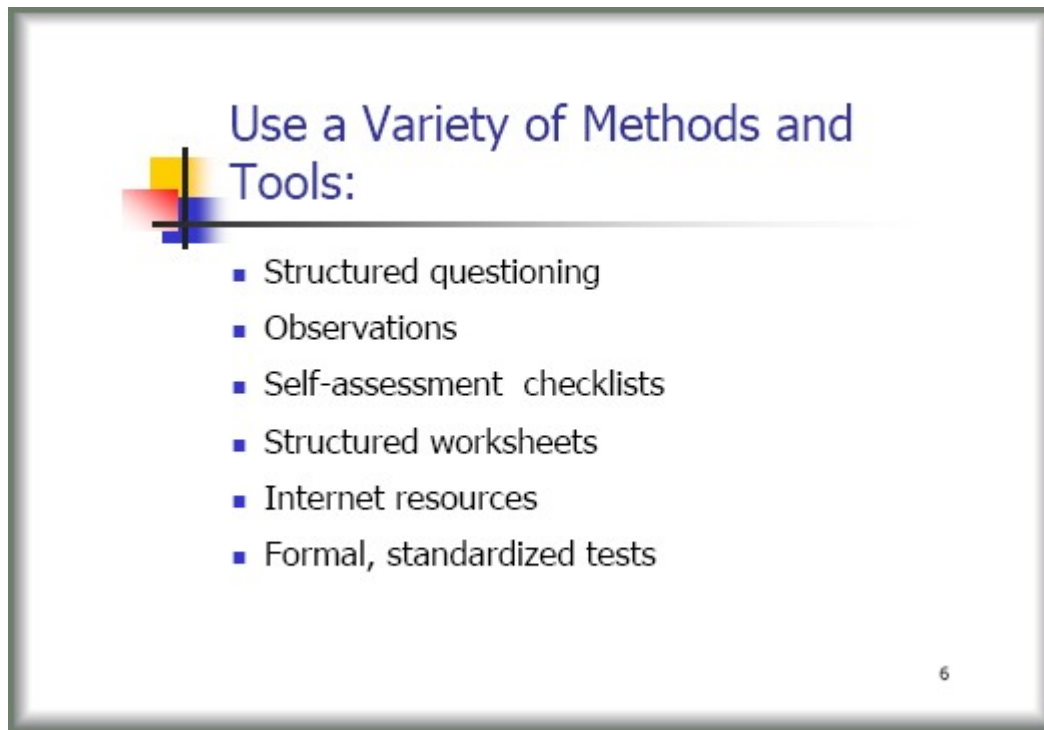
- Identifies:
 - strengths and assets
 - abilities, aptitudes and interests
 - occupational and employability levels.
- Assess barriers that interfere with participation on a continual basis.
- Provide supportive services.

5

Notes:

1. Point out that the ultimate purpose of this assessment process is to attain the goal of long-term employability.
2. Emphasize that the assessment must address work readiness, including educational and personal life issues as they relate to getting and keeping a job.
3. Explain that case managers must buy into the workforce development focus. They cannot just be satisfied with improvement of the youth's quality of life.

Module Two-A Slide 6:



Use a Variety of Methods and Tools:

- Structured questioning
- Observations
- Self-assessment checklists
- Structured worksheets
- Internet resources
- Formal, standardized tests

6

Notes:

1. Explain that too many assessments are not sufficiently comprehensive. Using a variety of methods and tools maximizes the process for both the participant and the system.
2. Point out that the participant should be provided opportunities during assessment to self-discover. Self-assessments, small group exercises, and Internet resources are particularly helpful to this process.
3. Many participants are not ready to identify employment goals. Career exploration is a legitimate initial goal if the planning phase provides for authentic exploration experiences.

Module Two-A Slide 7:

Use Assessment Instruments that Measure:

- Literacy and numeracy skills
- Work readiness and employability skills and characteristics identified for high-performance workplaces
- Competencies:
 - effectively using resources
 - interpersonal skills
 - information systems
 - technology
- Foundation skills
 - basic skills
 - thinking skills
 - personal qualities

*SCANS → → →

* Secretary's Commission on Achieving Necessary Skills

7

Notes:

1. Ask trainees how they help young people understand the importance of literacy and numeracy skills in getting and maintaining jobs. The discussion with youth should be held before administering the TABE test and revisited when providing feedback to the participant regarding their TABE test results and any remedial education that they might need.
2. Explain that Workplace Competencies and Skills for the 21st Century (SCANS) have been very specifically identified and it is important that case managers be well acquainted with them because business and industry use them as entry-level criteria.
3. Explain that all of the SCANS Competencies and Skills need to be embedded into the work readiness training.
4. Tell participants that if they have any questions about the importance of the SCANS Competencies and Skills they should visit their local businesses and industries to learn how they have been integrated into the world of work and hence the performance expectations of entry-level workers.
5. More information on SCANS is in the Manual (Chapter Three: Meeting the Needs of the Labor Market)

Module Two-A Slide 8:



Barriers to Employment and Need for Supportive Services

- Assess the need for supportive services, including:
 - transportation
 - childcare
 - dependent care
 - housing
 - linkages to community services
 - assistance with work-attire/work-related tools

8

Notes:

1. Explain that it is important for case managers to know the specifics and range of supportive services that they are able to provide.
2. Point out that in offering supportive services it is important throughout the program to explore how the participant will manage the particular need when these services are no longer available.

Module Two-A Slide 9:

Barriers (cont.)

- Assess for appropriate linkages to:
 - medical services
 - mental health assistance
 - alcohol and substance abuse counseling
- Valid driver's license?; need a driver's ed. course and/or test?; need to resolve related court issues?
- If there are issues that can result in arrest – refer to organizations that work with court services.

9

Notes:

1. Explain that examining barriers is an opportunity to both assess need and teach good social functioning. Help the participant understand the connection between medical services, mental health assistance, alcohol and substance abuse counseling and maintaining employment.
2. Point out that a driver's license or the need for a test, or unresolved court issues are only some examples of barriers.

Module Two-A Slide 10:



Establishing Career Goals

- Interest inventories help identify preferences.
- Arrange for youth to explore occupations that match interests and labor market needs through:
 - O*Net, Career Voyages
 - a state career information delivery system
 And Through job shadowing, work experience, internships.

10

Notes:

1. Explain that a number of resources are available on the Internet and should be used to support youth in their self-discovery during assessment.
2. It's easy to get in a rut - and use the same, familiar assessments. WIA staff should become familiar with the entire spectrum of tools offered by the Department of Labor, Employment and Training Administration, including the Job Corps Wheel of Opportunity.
3. Briefly explain that many case managers are under-using these instruments which are a rich resource for their work. Timely and accurate information is one of the most important services that they can provide participants. They need to familiarize themselves with these tools and use them.

Module Two-A Slide 11:

Informal/Formal Assessment Tools

- **Informal assessments** – less intimidating but more subjective, they include:
 - structured questioning – asked in a friendly, caring way;
 - worksheets/inventories – used individually or with groups;
 - Internet websites – free on-line; review first
 - observations – about work readiness, problems and barriers;

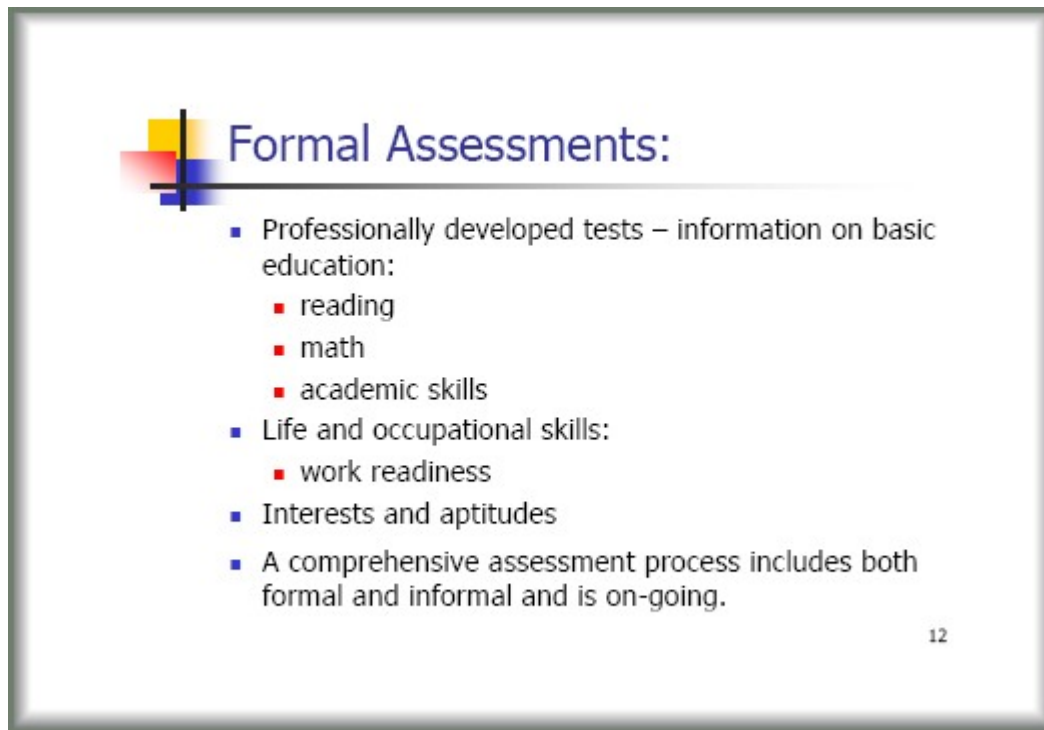
Helpful for information on dreams, goals, strengths, interests, fears, feelings.....

11

Notes:

1. Explain that the **informal** component of the assessment phase, well done, can be a tremendous learning experience for the participant. It may be the most effective time, if not the first time, that a young person is offered the opportunity to consider their access to the opportunities of this society. It is important that they not be short-changed in this process.
2. Add that it is important to recognize that this might be a very unfamiliar process to the youth and they may not appreciate it immediately or be responsive. It is important for the worker to be both enthusiastic and patient.
3. Briefly explain that some of these activities might be done with two or three participants at a time to stimulate interest and reduce tension.

Module Two-A Slide 12:



Formal Assessments:

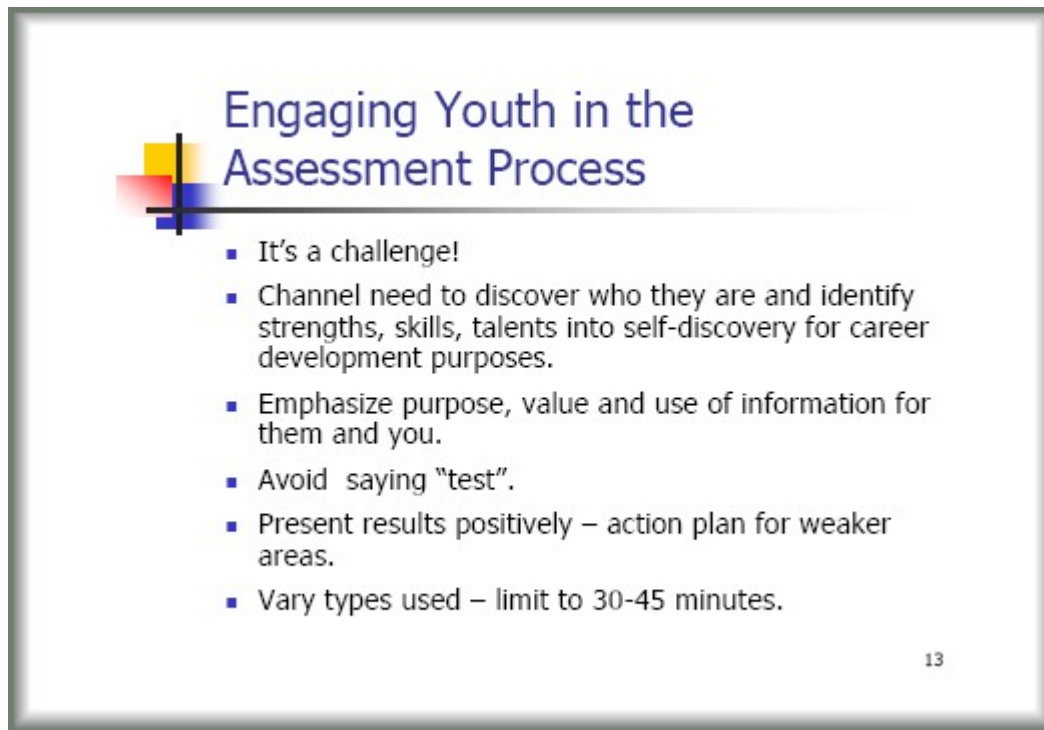
- Professionally developed tests – information on basic education:
 - reading
 - math
 - academic skills
- Life and occupational skills:
 - work readiness
- Interests and aptitudes
- A comprehensive assessment process includes both formal and informal and is on-going.

12

Notes:

1. Explain that benchmarks need to be determined in order to demonstrate growth and change. Case managers need to understand the purpose of the formal tests given and appreciate their value and limitations.
2. Add that case managers need to be prepared to interpret the results of various assessments with participants. In special situations, the assistance of an assessment expert may be required. Sharing assessments with participants is an absolute necessity.

Module Two-A Slide 13:



Engaging Youth in the Assessment Process

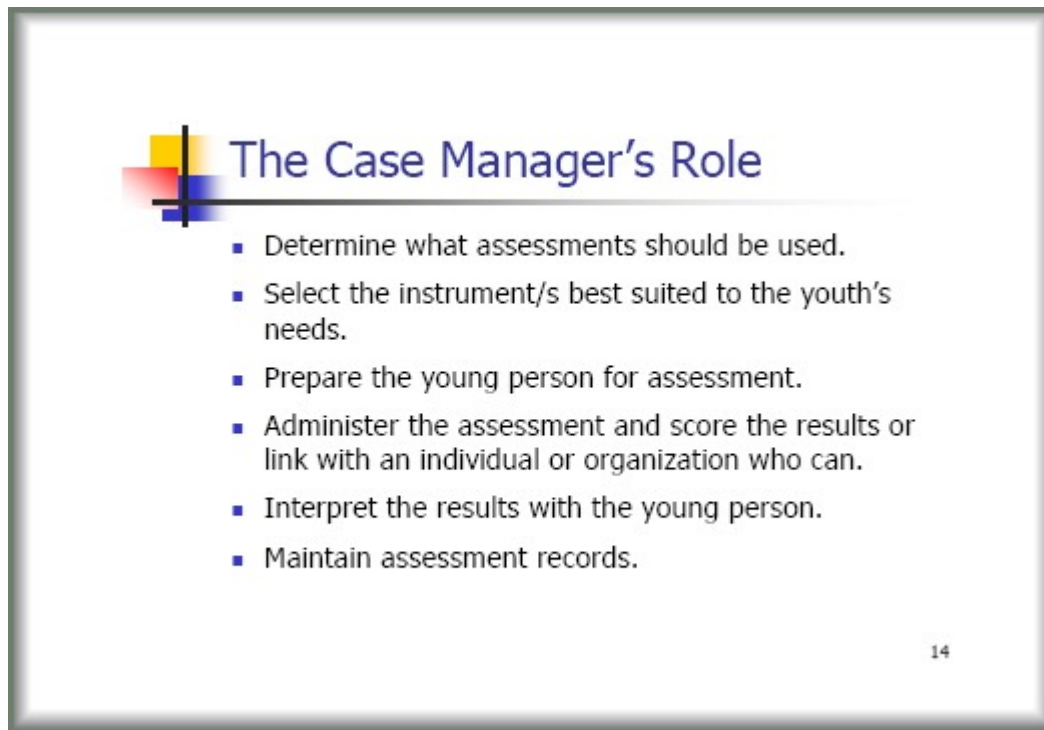
- It's a challenge!
- Channel need to discover who they are and identify strengths, skills, talents into self-discovery for career development purposes.
- Emphasize purpose, value and use of information for them and you.
- Avoid saying "test".
- Present results positively – action plan for weaker areas.
- Vary types used – limit to 30-45 minutes.

13

Notes:

1. Explain that engaging the youth in the assessment process as a partner and as a resource is essential. It is important that youth not be passive during this process.
2. Add that since the partnership develops over time, the quality during the next phase is impacted by the quality of previous phases.

Module Two-A Slide 14:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title "The Case Manager's Role" is in a dark blue font. Below the title is a list of six bullet points, each starting with a blue square. The slide number "14" is in the bottom right corner.

The Case Manager's Role

- Determine what assessments should be used.
- Select the instrument/s best suited to the youth's needs.
- Prepare the young person for assessment.
- Administer the assessment and score the results or link with an individual or organization who can.
- Interpret the results with the young person.
- Maintain assessment records.

14

Notes:

Review this slide as a summary of Module Two-A Assessment and check for any questions or comments

TRAINER STOP
CONDUCT TWO-A EXERCISE



TRAINING INSTRUCTIONS: MODULE TWO-A

EXERCISE OVERVIEW



Training Instruction:

Conduct exercise following the presentation of slides 1-14 – approximate times:

- 10 minutes to prepare for exercise
- 60 minutes to conduct
- 10 minutes for triad reports
- 10 minutes for whole group discussion

Exercise Overview:

The objectives of this exercise are for trainees to practice/learn:

- Case managers need to conduct a dialogue with youth instead of just asking question to fill in the form;
- Effective case managers listen for facts and themes in a young person's responses to help fill in the form and guide the service plan.

Participant Materials:

- Module One Exercise II two pages of instructions
- Profiles of Kimberly and Clarence (as provided)



TRAINING INSTRUCTIONS: MODULE TWO-A

PARTICIPANT HANDOUT #1

EXERCISE INSTRUCTIONS FOR PARTICIPANTS

Conducting an Assessment Dialogue

Exercise Note: Case managers usually ask questions based on a form designed for the MIS system that does not reflect the way people really think. Case managers need to develop a dialogue instead of merely asking questions from a form, e.g., “Tell me about school” versus “what grade did you finish?” They need to listen for facts and themes in the young person’s responses that will answer the questions on the form and guide the development of an effective service plan.

You will continue to use the descriptions of Kimberly and Clarence from Module One. You have met with them at least twice before this dialogue. Because this exercise has three rounds, please be sure to alternate the Kimberly and Clarence roles so both are represented in this exercise at least once.

Round One

In your triads – decide who will be the case manager, who will be Kimberly or Clarence, and who will be the observer for round One.

Step 1: Review the profile (Kimberly or Clarence) – what more does a case manager want to know about facts or feelings of this young person? – you may take notes.

- **Case Manager** – begin a dialogue with the young person based on their profiles – take up to 10 minutes. Take notes.
- **Young Person** – respond to case manager as you think Kimberly or Clarence would, based on their profiles – do **not** overact!
- **Observer**-watches and takes notes using the following page.

Step 2: At the end of 10 minutes, young person and observer have two or so minutes each to let the case manager know what they felt or observed.

Rounds Two & Three

Conduct in same way, rotating the Case Manager, Kimberly or Clarence, and observer roles until all have had a turn to experience each of the roles.

Time: 10 minutes for dialogue; up to 5 minutes for observations

Total time for exercise: 1 hour including preparation



TRAINING INSTRUCTIONS: MODULE TWO-A

INSTRUCTIONS FOR OBSERVERS

When observing, listen and watch for:

- A clear, welcoming opening – *“I’m interested to know more about your school experience...”*
- More reflecting statements than questions – *“Let me see if I understand how you feel about going back to school...”*
- Effective, open-ended questions, when used – *“What kinds of things do you think you’ll have difficulty with?”*
- Encouraging expansion on answers – *“It would help me understand if you would give me an example...”*
- Constructive/future oriented – *“It sounds as if safe day care for your children will help you go back to school.”*
- A clear, re-capping close – *“Then we’re agreed, we’ll...”*
- Eye contact, non-verbal; tone of voice – a friendly, caring manner

Take brief notes on this page for feedback.



TRAINING INSTRUCTIONS: MODULE TWO-A

PARTICIPANT HANDOUT #2

YOUTH PROFILES

Kimberly is 20 years old and has two children; a boy, Kip, 3; and a girl, Kelsey, who is 2. Their father, Kevin, is 26 years old, works as a chef's assistant in a local restaurant and pays child support. Kimberly has hopes that they will marry, and although Kevin assures her that they will, there are no plans in the making.

Kimberly has been receiving TANF assistance along with her child support; however she is required to seek employment. She has never worked. She dropped out of high school in the 10th grade when she became pregnant with Kip. She wants to put the children in a day care program that has opened near her home; however she must be either in school or working to be eligible for child care benefits. She actually liked school when she was attending and at one time had dreams of pursuing a career in accounting. She was taking her second course in accounting in high school when she dropped out.

Kip and Kelsey are very well behaved and a little shy. Until now, they have primarily only interacted with family members. Emphasis has been placed on their social skills (manners) and not on their other developmental and educational needs. Kimberly feels that the day care program will respond to these other needs and also provide an outlet for their increasing levels of energy. She tries to be a good mother and often reads articles on child-rearing that she finds in various popular magazines.



TRAINING INSTRUCTIONS: MODULE TWO-A

PARTICIPANT HANDOUT #3

YOUTH PROFILES

CLARENCE is a 19 year old high school graduate who has been unable to find steady gainful employment. He graduated a year ago and had hoped to join the Marines. Unfortunately, he did not perform well on their tests and, in addition a chronic heart problem, believed to be congenital, was discovered during the physical. Although he may need surgery in the future, he is currently receiving medications and routine monitoring.

Disappointed, Clarence has not been very aggressive about finding work. He has had a couple of fast food and part-time, but has not developed much of a work history. His academic record is also not good, although he stuck it out and graduated. He reads on a 7th grade level. Clarence lives with his mother, who is widowed with two younger children. Now that Clarence is no longer eligible for social security, his mother has been warning him that he has to go to work or find another place to live. To date, Clarence has managed to stay away from trouble. He reports that his mother has been arguing with him recently about “hanging out with the wrong people.” He resents this because he feels that she does not give him credit for never getting into trouble. He admits, however, that if he had a good full-time job, he would have less time on his hands and it would probably change who he hangs around with.



DEVELOPMENT OF AN INDIVIDUAL SERVICE STRATEGY (ISS)

Training Methodology: Power Point, large and small group work

Time: 3 hours

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- Hard copies of the Manual
- Module Three-B Exercise handouts:
 - a. Developing an Individual Service Strategy – role play instructions
 - b. Profiles of Kimberly and Clarence from Module One
 - c. Developing an ISS – group discussion instructions

PowerPoint Slides:

- Slide 1: Module Two-B Development of An Individual Service Strategy
- Slide 2: Module Two-B Objectives
- Slide 3: Purpose and Goal
- Slide 4: Characteristics of an ISS
- Slide 5: Goal-Setting
- Slide 6: Goal-Setting, Continued
- Slide 7: Tips for Long and Short -Term Goals/Objectives
- Slide 8: Tips for Long and Short-Term Goals/Objectives, continued
- Slide 9: Using an ISS Form
- Slide 10: Youth Profile, Kimberly
- Slide 11: Youth Profile, Clarence

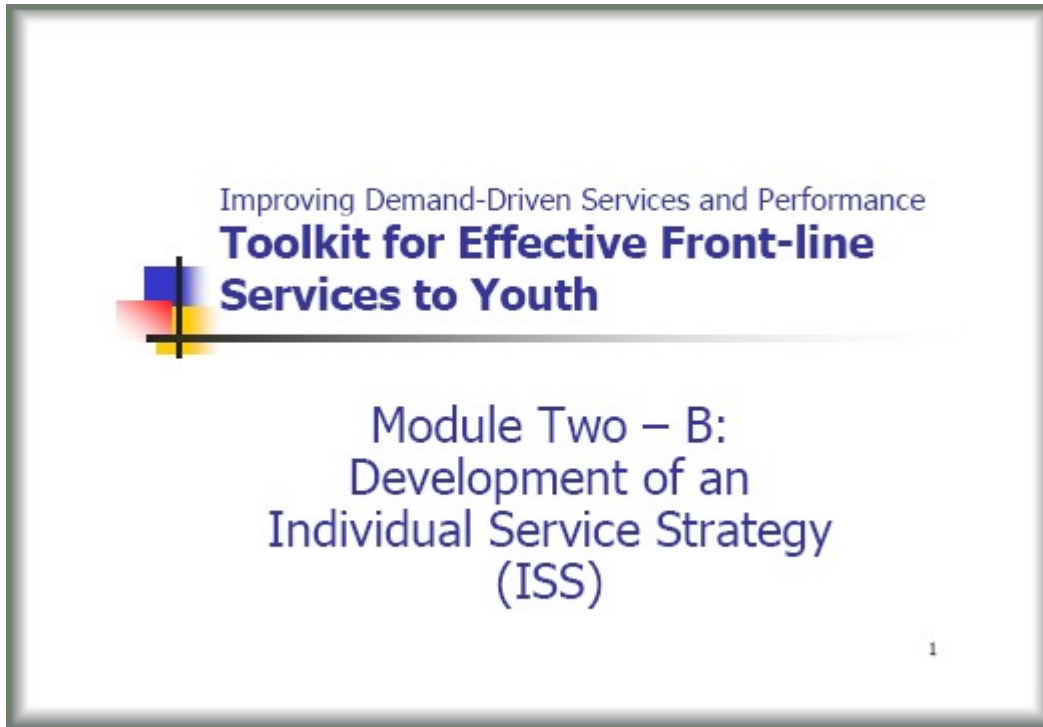
Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the manual
10 minutes	<ul style="list-style-type: none"> • Module Two-B present slides 1-3 	
15 minutes	<ul style="list-style-type: none"> • Training demonstration of blank paper group planning 	<ul style="list-style-type: none"> – Two flip charts and markers
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise I: Drafting an ISS <ul style="list-style-type: none"> – Form small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions: Kimberly and Clarence profiles from Module Two-A
30 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Flip charts & markers
15 minutes	<ul style="list-style-type: none"> • Group reports Exercise I 	
10 minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 minutes	<ul style="list-style-type: none"> • Module Two-B – presents slides 4-9 Goal Setting 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise II Developing Goals: <ul style="list-style-type: none"> – Small groups from Exercise I – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions – Exercise 1 flip charts
30 minutes	<ul style="list-style-type: none"> • Conduct Exercise II 	<ul style="list-style-type: none"> – Flip charts & markers
20 minutes	<ul style="list-style-type: none"> • Group reports Exercise II 	
10 minutes	<ul style="list-style-type: none"> • Whole group discussion of the exercise 	
10 minutes	(Suggested activities & materials) <ul style="list-style-type: none"> • Close Module Two-B <ul style="list-style-type: none"> – Feedback on the training – Next module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
<p>Total expected training time: 3 hours +/-</p>		



MODULE TWO-B DEVELOPMENT OF AN INDIVIDUAL SERVICE STRATEGY (ISS)

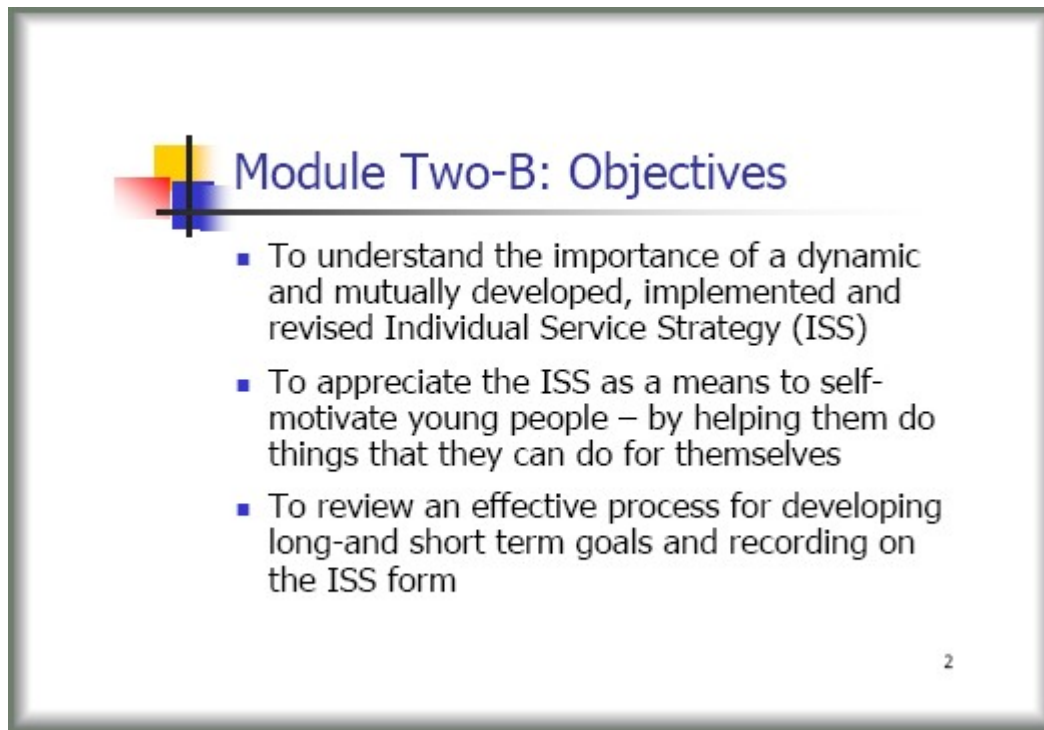
Module Two-B Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [Materials/ PowerPoint Slides List](#)
- Trainer See [Suggested Training Outline](#)

Module Two-B Slide 2:



Module Two-B: Objectives


- To understand the importance of a dynamic and mutually developed, implemented and revised Individual Service Strategy (ISS)
- To appreciate the ISS as a means to self-motivate young people – by helping them do things that they can do for themselves
- To review an effective process for developing long-and short term goals and recording on the ISS form

2

Notes:

This module presents the Individual Service Strategy (ISS) as both a process as well as a product. Key to its success is the quality of the involvement of the participant in its development.

Module Two-B Slide 3:



Purpose and Goal

- The Individual Service Strategy (ISS) has three purposes; to mutually develop, implement & revise:
 1. A set of employment, education, and personal development goals
 2. Service objectives and a service plan of action needed to achieve the identified goals and to
 3. Document services provided and results
- The goal of the ISS process is to enable youth to take responsibility for and actively participate in getting from where they are to where they want to be.

3

Notes:

1. Emphasize that the individual service strategy is a process, not a form, technological or administrative function.
2. It must be the youths' plan for themselves, **not** our plan for them.
3. Case managers must engage the young person in personal planning and document the information obtained in the formal ISS.
4. Planning begins, literally with a blank piece of paper. Tell participants you will demonstrate this and then they will practice it later in this module.
5. When case managers work with several participants at one time (3-6) to do this planning it can be a very dynamic process for all involved. You will also demonstrate this.
6. Since buy-in is an essential component of any successful plan implementation, it is critical that the ISS be developed by the participant and not just the case manager.
7. This is a good time to let them know that you will be asking for two volunteers to help you in the demonstration of Blank Paper Planning – assure them that you will not ask them to do anything to embarrass them or put them on the spot.

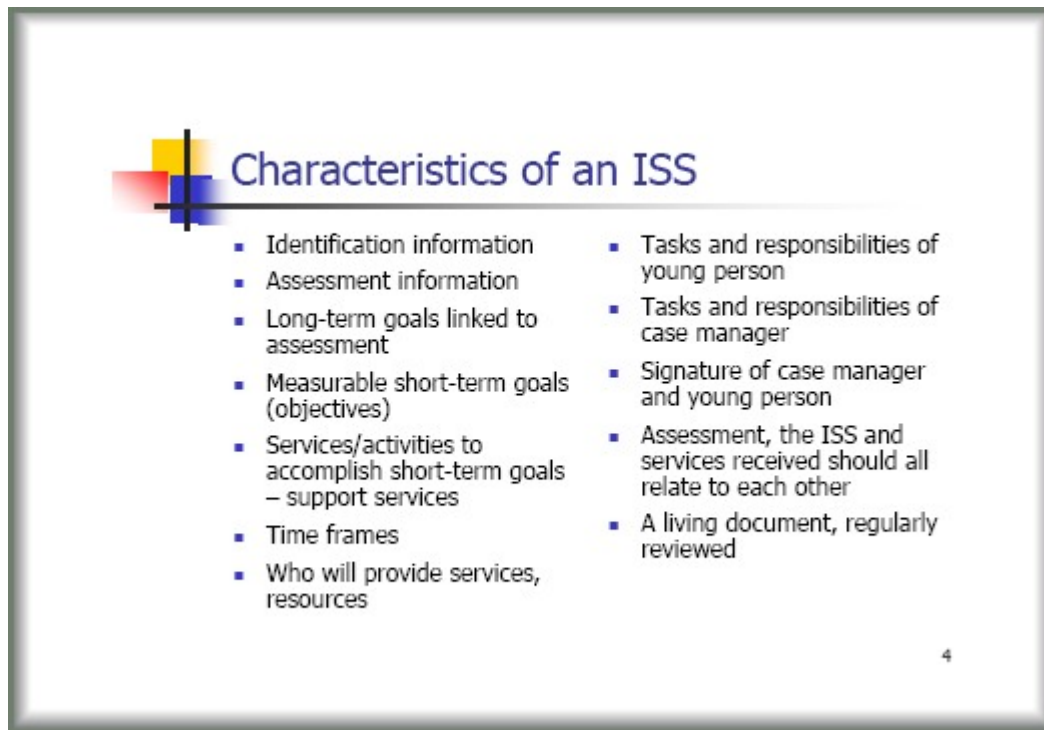


TRAINER STOP

**CONDUCT EXERCISE I
CONDUCT DRAFTING AN ISS DEMONSTRATION WITH TWO VOLUNTEER
PARTICIPANTS.**

PROCEED WITH PRESENTATION OF SLIDES 4-8.

Module Two-B Slide 4:



Characteristics of an ISS

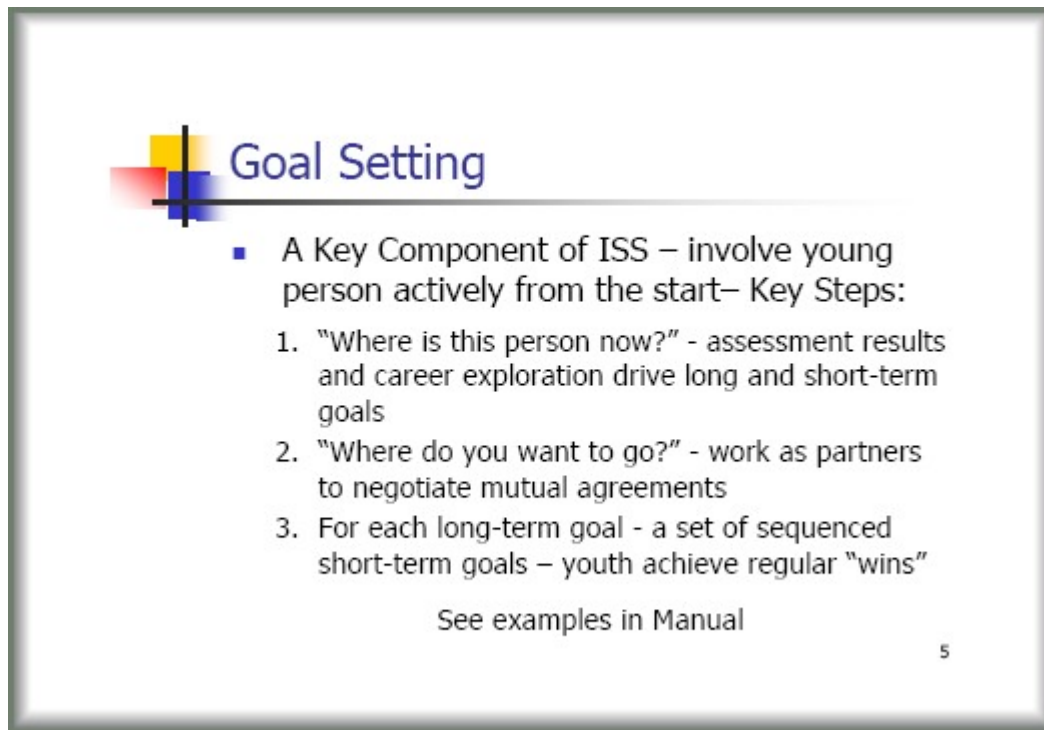
- Identification information
- Assessment information
- Long-term goals linked to assessment
- Measurable short-term goals (objectives)
- Services/activities to accomplish short-term goals – support services
- Time frames
- Who will provide services, resources
- Tasks and responsibilities of young person
- Tasks and responsibilities of case manager
- Signature of case manager and young person
- Assessment, the ISS and services received should all relate to each other
- A living document, regularly reviewed


4

Notes:

1. Point out that there are a wide variety of ISS forms but all of them should contain the characteristics identified on the slides.
2. Encourage participants to review their ISS forms to be sure that all characteristics are covered.
3. Explain that formal reviews of actual documents have shown that there is often a disconnect between the Assessment, the ISS, and the services provided. This should not be.
4. Point out that whatever the assessment reveals as a barrier in the personal, the educational, or the work experience arenas should be addressed in the ISS. In short, what is the plan to remedy the situation?
5. Emphasize the ISS as a program tool or “living document”. It should be regularly reviewed, accomplishments documented, and the plan updated.

Module Two-B Slide 5:



 **Goal Setting**

- A Key Component of ISS – involve young person actively from the start– Key Steps:
 1. “Where is this person now?” - assessment results and career exploration drive long and short-term goals
 2. “Where do you want to go?” - work as partners to negotiate mutual agreements
 3. For each long-term goal - a set of sequenced short-term goals – youth achieve regular “wins”


See examples in Manual

5

Notes:

1. Explain that the longer the case manager waits to involve the young person, the harder it will be.
2. Explain that waiting to get all the “business” out of the way before actively engaging the young person is not as effective as getting them actively involved as soon as possible – just talking with them isn’t enough to get them to invest themselves.

Module Two-B Slide 6:



Goal Setting (cont.)

4. Time-sequence and prioritize the goals and objectives - an action plan that focuses on "bite-size" pieces
5. Determine who does what – who needs to be involved – case manager's organization and/or referrals to partners
6. For understanding and ownership - young person re-states goals in own words

6

Notes:

1. Explain that the simplistic plan created on the blank piece of paper (e.g. from the Exercise "My Journey") must be backed into the formal ISS.
2. Point out that it is in this formal process that the case manager can take the lead for time-sequencing, prioritizing, determining who does what, etc. explaining thoroughly to the young person as you go so that they can see their plan in the formal document.

Module Two-B Slide 7:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Tips – Long and Short-Term Goals' is in a blue serif font. Below the title is a horizontal line. A bulleted list follows, with the first item being 'Long-term Employment Goals:' in bold. Two sub-bullets are listed below it. At the bottom center, there is a line of text: 'See suggested questions in the Manual'. A small number '7' is in the bottom right corner.

Tips – Long and Short-Term Goals

- **Long-term Employment Goals:**
 - Youth do research on job skills, education required, employment outlook, working conditions
 - Explore how a goal can be developed

See suggested questions in the Manual

7

Notes:

1. If the technology is available in this module's training – give participants a chance to go online and research employment opportunities for themselves.
2. Ask participants to take a few minutes to read in the manual about long-term goal setting for their usefulness. Give them enough time to find the questions and to review them.

Module Two-B Slide 8:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title is in blue text, and the main content is in black text with red square bullet points. The slide is framed by a grey border.

Tips – Long and Short-Term Goals (cont.)

- **Short-term Employment Goals:**
The series of action steps a youth must take to accomplish a long-term goal
 - small
 - specific
 - achievable

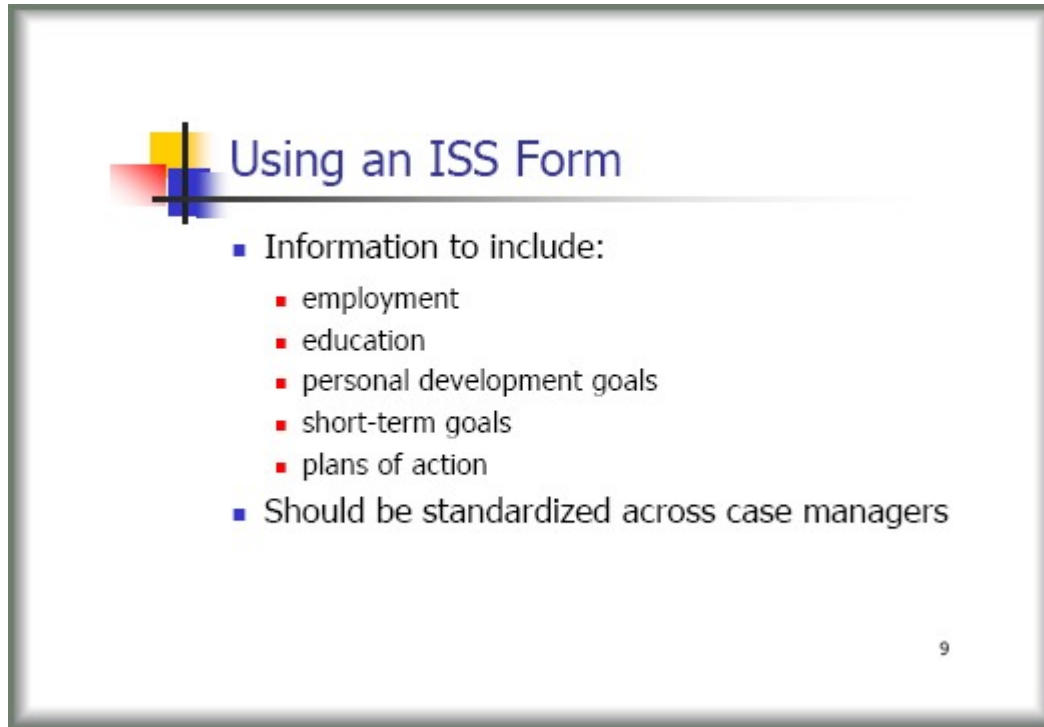
See suggested questions in the Manual

8

Notes:

Ask participants to take a few minutes to review suggested questions in the Manual for short-term goal setting and to comment on their usefulness.

Module Two-B Slide 9:



Using an ISS Form

- Information to include:
 - employment
 - education
 - personal development goals
 - short-term goals
 - plans of action
- Should be standardized across case managers

9


Notes:

ISS forms may vary, however it is important to address educational, career readiness or employment, and personal development issues and include all needed supports.

TRAINER STOP

CONDUCT EXERCISE II—DEVELOPING GOALS

Module Two-B Slide 10:



Youth Profiles

Kimberly is 20 years old and has two children: a boy, Kip, 3 and a girl, Kelsey, who is 2. Their father, Kevin, is 26 years old, works as a chef's assistant in a local restaurant and pays child support. Kimberly has hopes that they will marry, and although Kevin assures her that they will, there are no plans in the making.

Kimberly has been receiving TANF assistance along with her child support, however she is required to seek employment. She has never worked. She dropped out of high school in the 10th grade when she became pregnant with Kip. She wants to put the children in a day care program that has opened near her home, however she must be either in school or working to be eligible for child care benefits. She actually liked school when she was attending and at one time had dreams of pursuing a career in accounting. She was taking her second course in accounting in high school when she dropped out.


Kip and Kelsey are very well behaved and a little shy. Until now, they have primarily only interacted with family members. Emphasis has been placed on their social skills (manners) and not on their other developmental and educational needs. Kimberly feels that the day care program will respond to these other needs and also provide an outlet for their ever increasing levels of energy. She tries to be a good mother and often reads articles on child-rearing that she finds in various popular magazines.

10

Notes:

This slide is contains 1 of 2 Youth Profiles for exercises.

Module Two-B Slide 11:



Youth Profiles

Clarence is a 19 year old high school graduate who has been unable to find steady gainful employment. He graduated a year ago and had hoped to join the Marines. Unfortunately, he did not perform well on their tests and, in addition a chronic heart problem, believed to be congenital, was discovered during the physical. Although he may need surgery in the future, he is currently receiving medications and routine monitoring. Disappointed, Clarence has not been very aggressive about finding work.

He has had a couple of fast food and part-time jobs, but has not developed much of a work history. His academic record is also not good, although he stuck it out and graduated. He reads on a 7th grade level. Clarence lives with his mother, who is widowed with two younger children. Now that Clarence is no longer eligible for social security, his mother has been warning him that he has to go to work or find another place to live. To date, Clarence has managed to stay away from trouble. He reports that his mother has been arguing with him recently about "hanging out with the wrong people." He resents this because he feels that she does not give him credit for never getting into trouble. He admits, however, that if he had a good full-time job, he would have less time on his hands and it would probably change whom he hangs with.

11

Notes:

This slide is contains 2 of 2 Youth Profiles for exercises.



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE I OVERVIEW



Training Instruction:

Conduct Exercise I (Blank Paper Exercise) following the presentation of slides 1-3 – approximate total times:

- 10 minutes to prepare for exercise
- 30 minutes to conduct
- 15 minutes for group reports
- 10 minutes for whole group discussion

Exercise Overview:

The objectives of this demonstration are for trainees to practice/learn:

- The value of engaging young people in the planning process
- How to help a young person draft the components of an ISS using blank paper
- How to work with several young people at a time

Participant Materials:

- Module Two-B Exercise I instructions
- Profiles of Kimberly and Clarence
- Flipchart paper and markers



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into small groups • Give all groups the Exercise Instructions handout • Direct each group to the Note at the beginning of their exercise instructions to place the exercise in context • Review the instructions on the Exercise Handout carefully <p>Ask groups to report their experience with the exercise, for example:</p> <ol style="list-style-type: none"> 1. As the case manager, how effective did it seem to be to work with more than one person at a time? 2. What feedback did “Kimberly” or “Clarence” and the observers give? 3. What did they learn or refresh themselves on from the exercise that they can apply to their work? 	<p>You will need at least three trainees to a group – the rest of the group will be observers who provide feedback at the end of the exercise.</p> <p>You may read this aloud to the groups.</p> <p>Check with each group to be sure they understand the instructions:</p> <p>There are three roles in this exercise – the “case manager”, “Kimberly”, and “Clarence”. Both the observers and Clarence/Kimberly give feedback to the case manager at the end of the exercise.</p> <p>Remind trainees that they will have met with Kimberly and Clarence at least three times before this session.</p> <p>Their goal is to develop draft ISS’s for each of these young people using the Blank Paper/My Journey process modeled in your demonstration.</p> <p>Note: An effective demonstration of the “Blank Paper” activity is key to the success of exercises I & II. Be sure you have thoroughly reviewed and understand it before conducting the demonstration.</p> <ol style="list-style-type: none"> 1. Ask for two volunteers to help you in a demonstration – assure the participants that you will not ask them to do anything to embarrass them or put them on the spot. 2. Ask the volunteers to each role play a “typical” young person’s responses based on their experience as they follow your instructions.

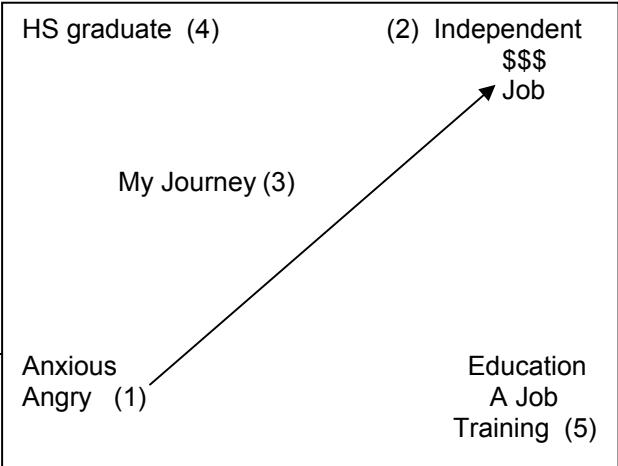


3. Open the demonstration as you would normally when beginning a session with a young person...then introduce the activity, for example, “As you know we’re working on developing a service plan for you and this is an opportunity for you to think through some short and long-term goals for yourself.”

4. Your goal is to have each “youth” in the demonstration develop a flipchart page that looks like the sample Clarence and Kimberly charts in the next column. The step by step process is labeled in the samples:

- Ask each “youth” to characterize who they are today in words or pictures in the **bottom left hand corner** of the flip chart paper.
- In the **top right hand corner**, ask them to describe what they want to have five years from now. Encourage them to state long-term (five year) employment goals if they know them or to be willing to explore them if they don’t know.
- As them to draw a straight arrow from where they are today, **bottom left hand corner**, to the **top right hand corner** and to write along the line: **My JOURNEY** (spell it for them **J-O-U-R-N-E-Y**).

“My Journey” example for “Clarence”





	<ul style="list-style-type: none"> • In the top half of the paper, encourage them to list everything they have going for them, e.g. strengths. • In the bottom half of the paper, ask them to identify the kinds of things they need in order to reach their five-year goal. • To close the demonstration – point out to the “youth” volunteers that they have begun to think through what they need to do to get from (1) where they are today to (2) where they want to be – and (4) the strengths they have and (5) what they’ll need to help them get there. • Close by reminding them that (3) their journey may not be a straight line – there may be “bumps in the road” but working in partnership with you they can get there. Tell them you will keep their charts so they can review them again to see where they are on the journey. <p>After the demonstration, check that all trainees understand that you were developing “a plan” to use as a basis for creating an individual service strategy before instructing them for Exercise I which follows the demonstration.</p>
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TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

This exercise focuses the case manager on actively engaging young people in developing their plans for themselves as well as on the efficiency of group versus individual planning. In this process the case manager can see what the young person has internalized from assessment discussions about his or her strengths. Information from this exercise backs nicely into objectives for the formal ISS.

You will use the descriptions of Kimberly and Clarence from the previous chapter and at least two pages of blank flipchart paper and markers, one for each “young person”.

Step 1: In your group – decide who will be the Case Manager, who will be Kimberly and Clarence. The rest of the group will be observers who provide feedback at the end of the exercise.

Step 2: Briefly review Kimberly and Clarence’s profiles and then using the training demonstration as a model:

- The Case Manager asks Kimberly and Clarence to characterize who they are today in words or pictures in the bottom left hand corner of the flip chart paper.
- In the top right hand corner, ask them to describe what they want to have five years from now. Encourage them to state long-term (five-year) employment goals if they know them or to explore them if they don’t know.
- Ask them to draw a straight arrow from where they are today, bottom left hand corner, to the top right hand corner and to write along the line: **My Journey**
- In the top half of the paper, encourage them to list everything they have going for them, e.g. strengths.
- In the bottom half of the paper, ask them to identify what they need in order to reach their five-year goal.

Step 3: Observers and “Kimberly” and “Clarence” give feedback on the process – what worked well and what might have worked better.

Time: 20 minutes for role-play
10 minutes for observers’ feedback



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE I AND II HANDOUT FOR PARTICIPANTS

YOUTH PROFILE

Kimberly is 20 years old and has two children: a boy, Kip, 3 and a girl, Kelsey, who is 2. Their father, Kevin, is 26 years old, works as a chef's assistant in a local restaurant and pays child support. Kimberly has hopes that they will marry, and although Kevin assures her that they will, there are no plans in the making.

Kimberly has been receiving TANF assistance along with her child support; however she is required to seek employment. She has never worked. She dropped out of high school in the 10th grade when she became pregnant with Kip. She wants to put the children in a day care program that has opened near her home; however she must be either in school or working to be eligible for child care benefits. She actually liked school when she was attending and at one time had dreams of pursuing a career in accounting. She was taking her second course in accounting in high school when she dropped out.

Kip and Kelsey are very well behaved and a little shy. Until now, they have primarily only interacted with family members. Emphasis has been placed on their social skills (manners) and not on their other developmental and educational needs. Kimberly feels that the day care program will respond to these other needs and also provide an outlet for their ever increasing levels of energy. She tries to be a good mother and often reads articles on child-rearing that she finds in various popular magazines.



TRAINING INSTRUCTIONS: MODULE TWO-B

PARTICIPANT HANDOUT #3 EXERCISE I AND II HANDOUT FOR PARTICIPANTS

YOUTH PROFILE

Clarence is a 19 year old high school graduate who has been unable to find steady gainful employment. He graduated a year ago and had hoped to join the Marines. Unfortunately, he did not perform well on their tests and, in addition a chronic heart problem, believed to be congenital, was discovered during the physical. Although he may need surgery in the future, he is currently receiving medications and routine monitoring. Disappointed, Clarence has not been very aggressive about finding work.

He has had a couple of fast food and part-time jobs, but has not developed much of a work history. His academic record is also not good, although he stuck it out and graduated. He reads on a 7th grade level.

Clarence lives with his mother, who is widowed with two younger children. Now that Clarence is no longer eligible for social security, his mother has been warning him that he has to go to work or find another place to live. To date, Clarence has managed to stay away from trouble. He reports that his mother has been arguing with him recently about “hanging out with the wrong people.” He resents this because he feels that she does not give him credit for never getting into trouble. He admits, however, that if he had a good full-time job, he would have less time on his hands and it would probably change whom he hangs with.



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE II OVERVIEW

Trainer Instructions

Following the presentation of slides 4-9 – Approximate times:

- 10 minutes to prepare for exercise
- 30 minutes to conduct
- 20 minutes for group reports
- 10 minutes for whole group discussion

Exercise Overview:

The objectives of this exercise are for trainees to:

- Identify the three areas of a well-rounded ISS: education, work and personal
- Practice developing an ISS around the three areas using the interests and needs identified in the Blank Page activity.

Participant Materials:

- Module Two-B Exercise II instructions
- Flipcharts developed in Exercise I
- Markers



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE II

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Participants work in the same groups as Exercise I. • Give each participant the Exercise Instructions handouts. • Direct each group to the Note at the beginning of their exercise instructions to place the exercise in context. • Review the instructions on the Exercise Handout carefully. • Ask groups to report from their flipcharts. • Ask participants what they learned or refreshed themselves on from the exercise that they can apply in their work? 	<ul style="list-style-type: none"> • Groups use the “My Journey” flipcharts they developed for Kimberly or Clarence. They are to write directly on the flipcharts. • You may read this aloud to the groups. • Check with each group to be sure they understand the instructions. • They are to develop a total of six goals, three for Kimberly and three for Clarence. <p>Sample goals:</p> <p>Kimberly:</p> <ul style="list-style-type: none"> • Education – obtain GED, enter post-secondary • Employment: Work readiness; part-time employment • Personal: Get day care issue settled <p>Clarence:</p> <ul style="list-style-type: none"> • Education – Enroll in literacy program to improve reading skills. • Employment: Identify industry/occupations related to the military • Personal: Discuss goals with Mother to get her support



TRAINING INSTRUCTIONS: MODULE TWO-B

EXERCISE II INSTRUCTIONS FOR PARTICIPANTS

A well rounded ISS focuses on three areas: education, work and personal. Assessments will reveal barriers to successful achievement in one or more of these areas which are then addressed in the ISS and remedied through the services provided. The ISS is a living document which should be regularly reviewed, accomplishments documented and the plan updated.

Step 1: In your small group, review the flipcharts you developed in the Blank Paper exercise in this module and develop the short-term goal statements for Kim and Clarence.

- Educational goals
- Employment goals
- Personal goals
- You will develop a total of six goals, three for Kimberly; three for Clarence
- Ask “Kimberly” and “Clarence” to record their goals directly on the flipchart developed in Exercise I.

Step 2: Select someone to report back to the whole group.

Time: 30 minutes to develop goal statements; 2 minutes to report



MEETING THE NEEDS OF THE LABOR MARKET

Training Methodology: PowerPoint, large and small group work

Time: 3 hours

Materials

- Computer with PowerPoint
- PowerPoint handouts
- Hard copies of the Manual
- Module Four Exercise handouts

PowerPoint Slides

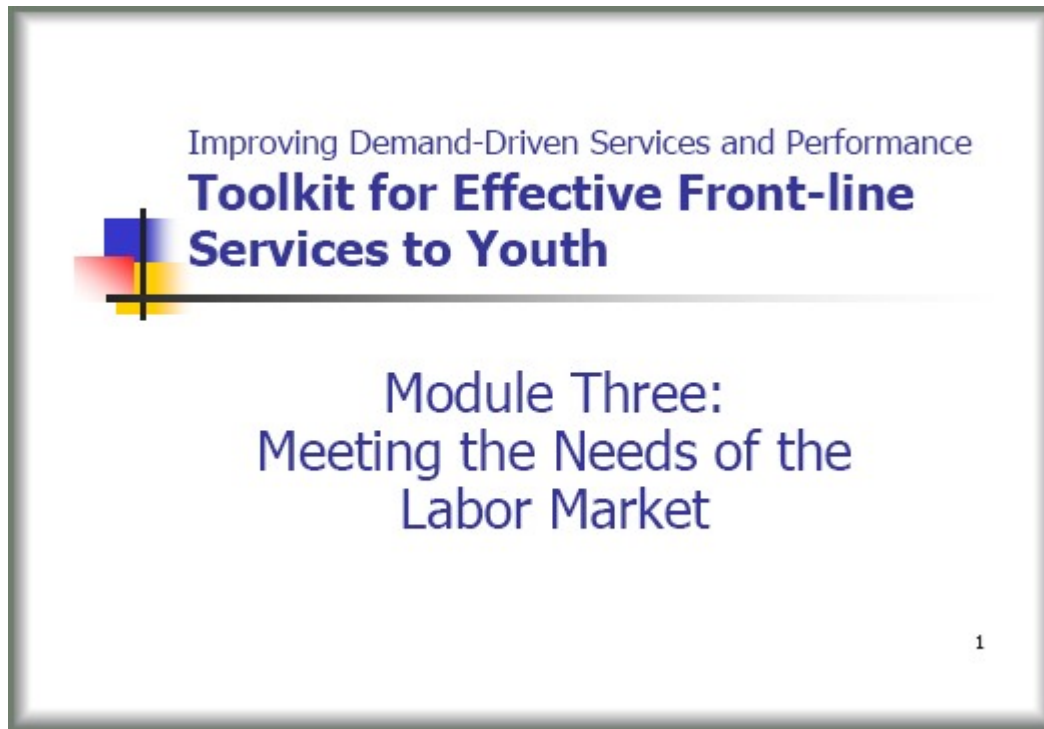
- Slide 1: Module Three: Meeting the Needs of the Labor Market
- Slide 2: Module Three Objectives
- Slide 3: Module Three Purpose
- Slide 4: Roles and Responsibilities of Case Managers
- Slide 5: Tips
- Slide 6: ETA Sources of Labor Market and Workforce Information
- Slide 7: SCANS
- Slide 8: Foundation Skills, Basic
- Slide 9: Foundation Skills, Thinking
- Slide 10: Foundation Skills, Personal Qualities
- Slide 11: Five Work Place Competencies: Resources
- Slide 12: Five Work Place Competencies: Information
- Slide 13: Five Work Place Competencies: Interpersonal
- Slide 14: Five Work Place Competencies: Systems
- Slide 15: Five Work Place Competencies: Technology

Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the Toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of the Manual – Hard copies of the slides
30 minutes	<ul style="list-style-type: none"> • Module Three Slide Presentation 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise I LMI Presentations <ul style="list-style-type: none"> – Form 4 small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions
25 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Exercise instructions – Kimberly & Clarence profiles
15 minutes	<ul style="list-style-type: none"> • Group reports Exercise I 	
10 minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise II Relevant LMI and Tools <ul style="list-style-type: none"> – Small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions; – Kimberly & Clarence profiles
20 minutes	<ul style="list-style-type: none"> • Conduct Exercise II 	<ul style="list-style-type: none"> – Flipcharts & markers
15 minutes	<ul style="list-style-type: none"> • Group reports Exercise II 	
10 minutes	<ul style="list-style-type: none"> • Whole group discussion of Exercise II 	
10 minutes	<ul style="list-style-type: none"> • Close Module Three <ul style="list-style-type: none"> – Feedback on today – Next Module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
Total expected training time: 3 hours +/-		

MODULE THREE MEETING THE NEEDS OF THE LABOR MARKET

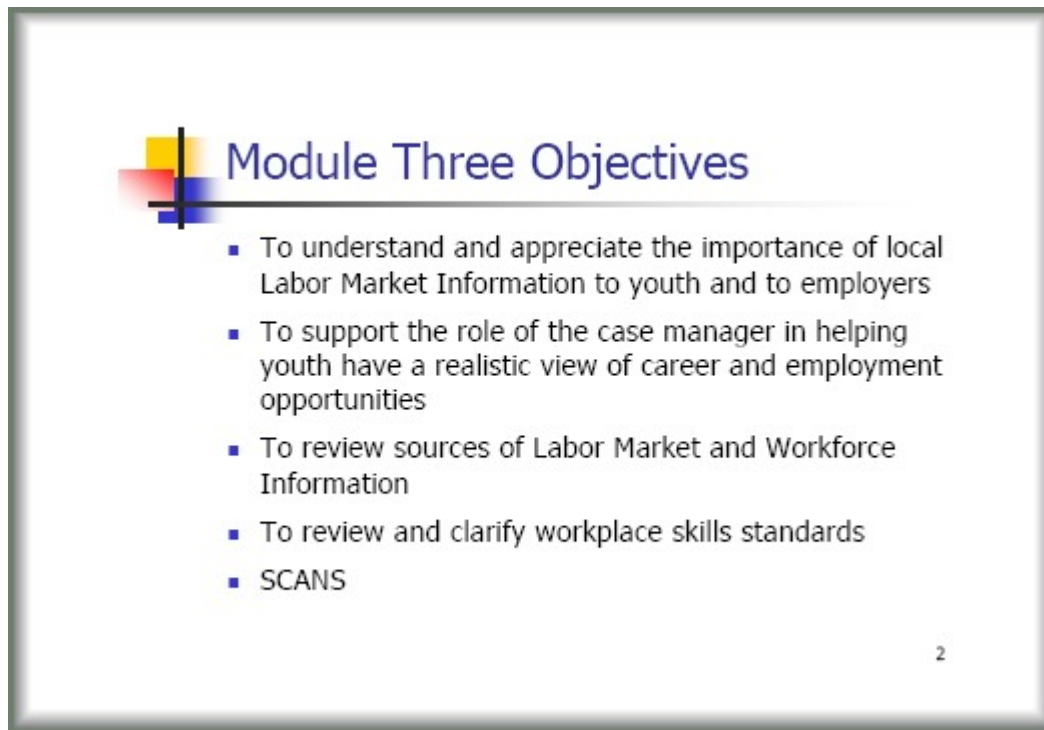
Module Three Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [Materials/PowerPoint Slides List](#)
- Trainer See [Suggested Training Outline](#)

Module Three Slide 2:

A presentation slide titled "Module Three Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide lists five bullet points: "To understand and appreciate the importance of local Labor Market Information to youth and to employers", "To support the role of the case manager in helping youth have a realistic view of career and employment opportunities", "To review sources of Labor Market and Workforce Information", "To review and clarify workplace skills standards", and "SCANS". A small number "2" is in the bottom right corner.

Module Three Objectives


- To understand and appreciate the importance of local Labor Market Information to youth and to employers
- To support the role of the case manager in helping youth have a realistic view of career and employment opportunities
- To review sources of Labor Market and Workforce Information
- To review and clarify workplace skills standards
- SCANS

2

Notes:

This three hour module presents information vital to the role of case managers as workforce development specialists. It emphasized the importance of the worker as a specialist in achieving the goal of youth employment.

Module Three Slide 3:



Purpose

- Audiences: youth, employers and community
- Youth - who employs whom, where and for what wages
- Employers - tracks local and national industry trends; availability and quality of workers; investments in training resources
- Community – monitor workforce needs; attract new businesses, etc.

3

Notes:

1. Emphasize that youth, employers and the community have differing but interconnected needs for economic and workforce information.
2. Case managers in the field of workforce development are obligated to be sources of accurate, timely information regarding local, regional, national and international labor market information.

Module Three Slide 4:



Roles and Responsibilities of Case Managers

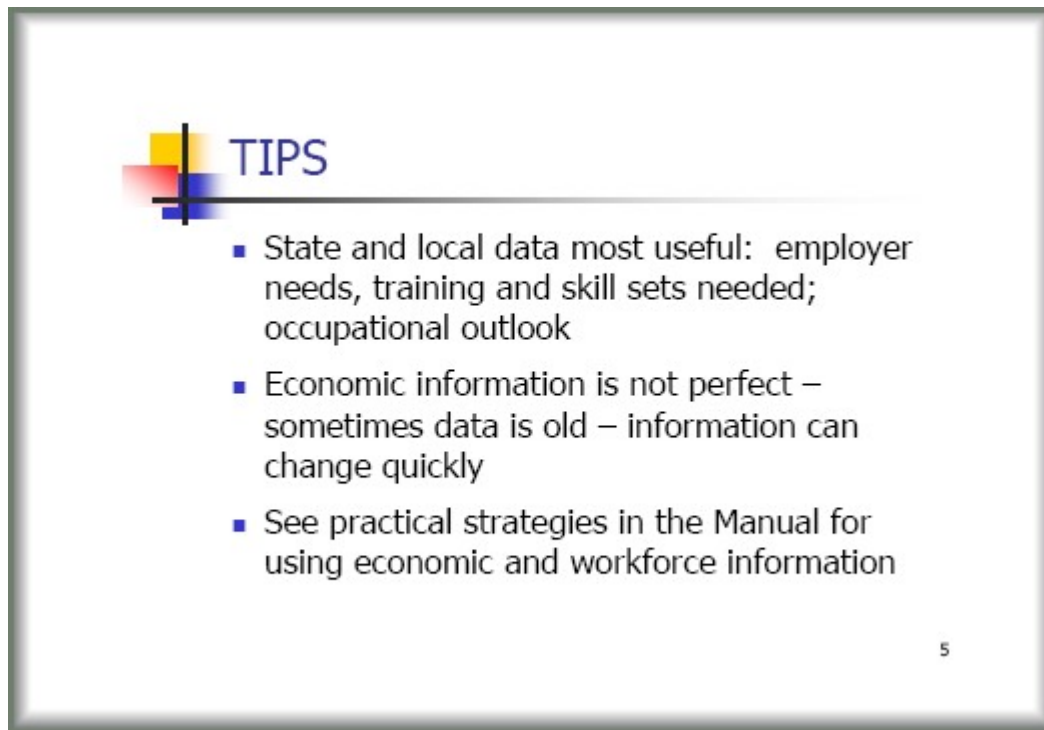
- Provide youth with realistic view of opportunities in the community; identify career paths; gain understanding of cost of living; compare local salaries
- Assists youth to explore "career pathways" and types of training involved; provides regional and future information
- Establishes and maintains good relations with employers and workforce board and/or economic development councils

4

Notes:

1. The case manager's role is changing from only serving special populations to serving the community as a whole.
2. People will be increasingly dependent on the workers and the profession for the necessary information to make work transitions as smoothly as possible.

Module Three Slide 5:



TIPS

- State and local data most useful: employer needs, training and skill sets needed; occupational outlook
- Economic information is not perfect – sometimes data is old – information can change quickly
- See practical strategies in the Manual for using economic and workforce information

5

Notes:

1. Point out that staying on top of this information will be challenging.
2. Remind them of the emphasis on high performing work organizations. This is one of the areas where lifelong learning is applicable to them as well.
3. Review the practical strategies in the Manual and poll the group for what is and is not being currently used.
4. Encourage participants to discuss what works and what creates difficulties for them.

Module Three Slide 6:



ETA Sources of Labor Market and Workforce Information

- America's Labor Market Information System (ALMIS)*
- America's CareerInfoNet (ACINET)*
- CareerInfoNet*
- CareerOneStop portal*
 - America's Job Bank (AJB)
 - America's Service Locator (ASL)
 - O*NET OnLine
 - Workforce Tools of the Trade
- Career Voyages

*See descriptions in Manual

6

Notes:

1. Explain that the Employment and Training Administration of the Department of Labor has rich resources for them for Labor Market and Workforce Information.
2. Poll the group for which resources they use the most. Conduct a brief discussion on how comfortable they are with LMI data and how familiar with how to access and use it.
3. Point out that professional competence requires them to be on top of these resources. The SCANS competency of a workforce development case manager is measured by their knowledge of the resources available and their skill at using the technology involved.

Module Three Slide 7:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The main title is 'SCANS* (Workplace Skills Standards) Review and Clarification'. Below the title is the text '*Secretary's Commission on Achieving Necessary Skills'. A subtitle reads 'Skills and characteristics that employers have identified as essential for success in the workplace'. The content is organized into two columns of bulleted items: '3 Foundation Skills' and '5 Competencies'. A small number '7' is located in the bottom right corner of the slide frame.

SCANS* (Workplace Skills Standards) Review and Clarification

*Secretary's Commission on Achieving Necessary Skills

Skills and characteristics that employers have identified as essential for success in the workplace

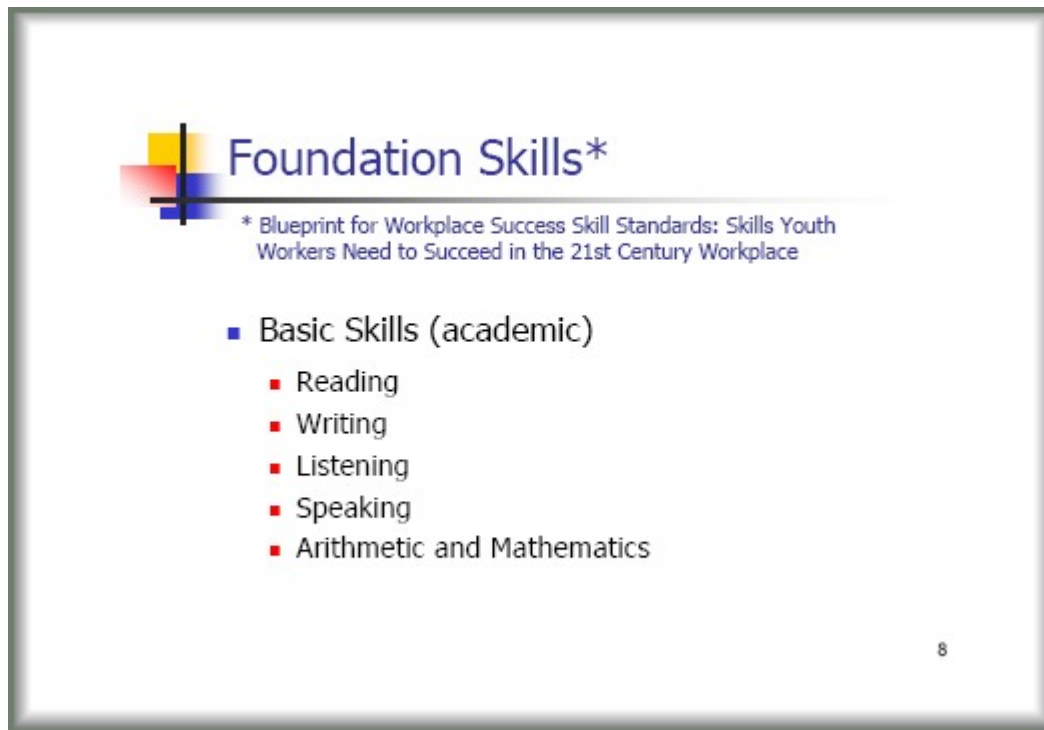
- 3 Foundation Skills:
 - basic skills
 - thinking skills
 - personal qualities
- 5 Competencies:
 - resources
 - interpersonal skills
 - information
 - systems
 - technology

7

Notes:

1. Explain that these skills and competencies were identified by a major commission of government, business, labor, and education in 1991 whose purpose was to determine what type of worker was needed for the 21st century labor market.
2. Explain that labor and industry have already integrated these competencies and skills into their expectations of entry-level workers.
3. Tell participants that anyone without these skills and competencies will have extreme difficulty maintaining employment and livable wages in our society throughout their lifetime; a major reason why the emphasis on youth and work is so critical.

Module Three Slide 8:



The slide features a title 'Foundation Skills*' with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. Below the title is a subtitle: '* Blueprint for Workplace Success Skill Standards: Skills Youth Workers Need to Succeed in the 21st Century Workplace'. A bulleted list follows, starting with 'Basic Skills (academic)' and listing five sub-points: Reading, Writing, Listening, Speaking, and Arithmetic and Mathematics. The number '8' is in the bottom right corner.

Foundation Skills*

* Blueprint for Workplace Success Skill Standards: Skills Youth Workers Need to Succeed in the 21st Century Workplace

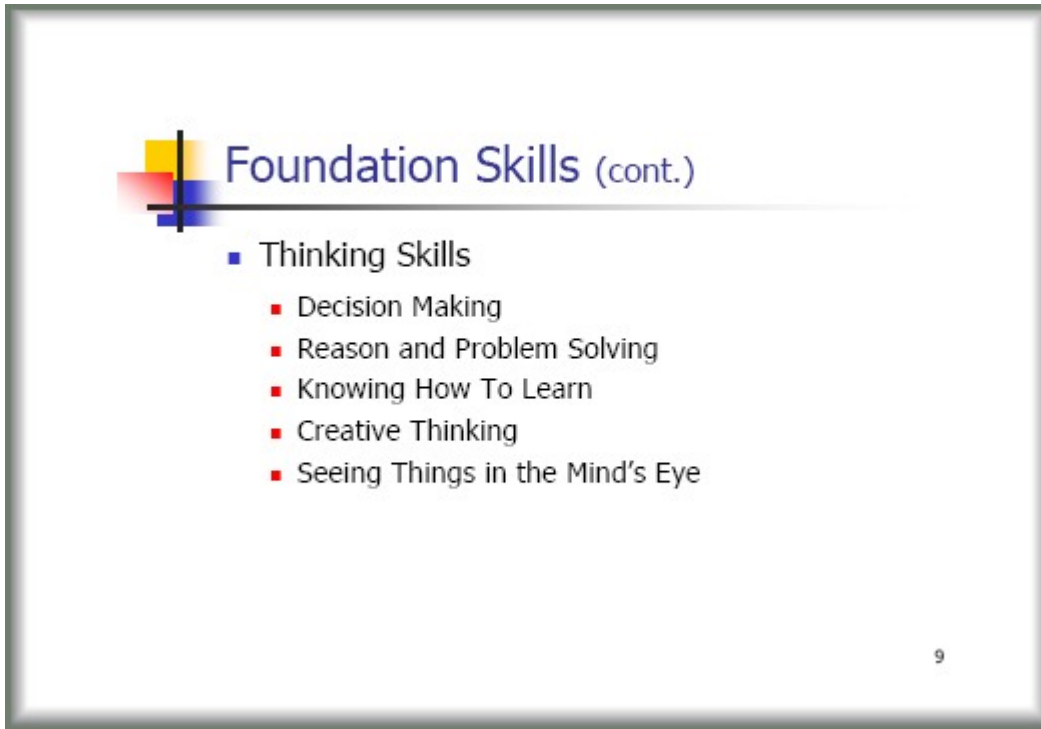
- Basic Skills (academic)
 - Reading
 - Writing
 - Listening
 - Speaking
 - Arithmetic and Mathematics

8

Notes:

Ask participants to review the Foundation Skills with their caseload in mind. What, if any, are their concerns about the skill levels of youth they are currently serving?

Module Three Slide 9:



The slide features a decorative graphic on the left consisting of overlapping yellow, red, and blue squares with a black crosshair. The title "Foundation Skills (cont.)" is in a dark blue font. Below the title is a horizontal line, and then a bulleted list of "Thinking Skills" with red square markers. The number "9" is in the bottom right corner.

Foundation Skills (cont.)

- Thinking Skills
 - Decision Making
 - Reason and Problem Solving
 - Knowing How To Learn
 - Creative Thinking
 - Seeing Things in the Mind's Eye

9

Notes:

Ask participants to review the Thinking Skills with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?

Module Three Slide 10:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title "Foundation Skills (cont.)" is positioned to the right of this graphic. Below the title, a blue square bullet point is followed by the text "Personal Qualities". Underneath this, five red square bullet points list the following items: "Self Management", "Responsibility", "Integrity/Honesty", "Self-Esteem", and "Sociability". The number "10" is located in the bottom right corner of the slide.

Foundation Skills (cont.)

- Personal Qualities
 - Self Management
 - Responsibility
 - Integrity/Honesty
 - Self-Esteem
 - Sociability

10

Notes:

1. Ask participants to review the Personal Qualities with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?
2. Remind the group that all of the Foundation Skills are considered entry-level skills.

Module Three Slide 11:

The Five Work Place Competencies:
Resources, Information, Interpersonal Skills,
Systems & Technology

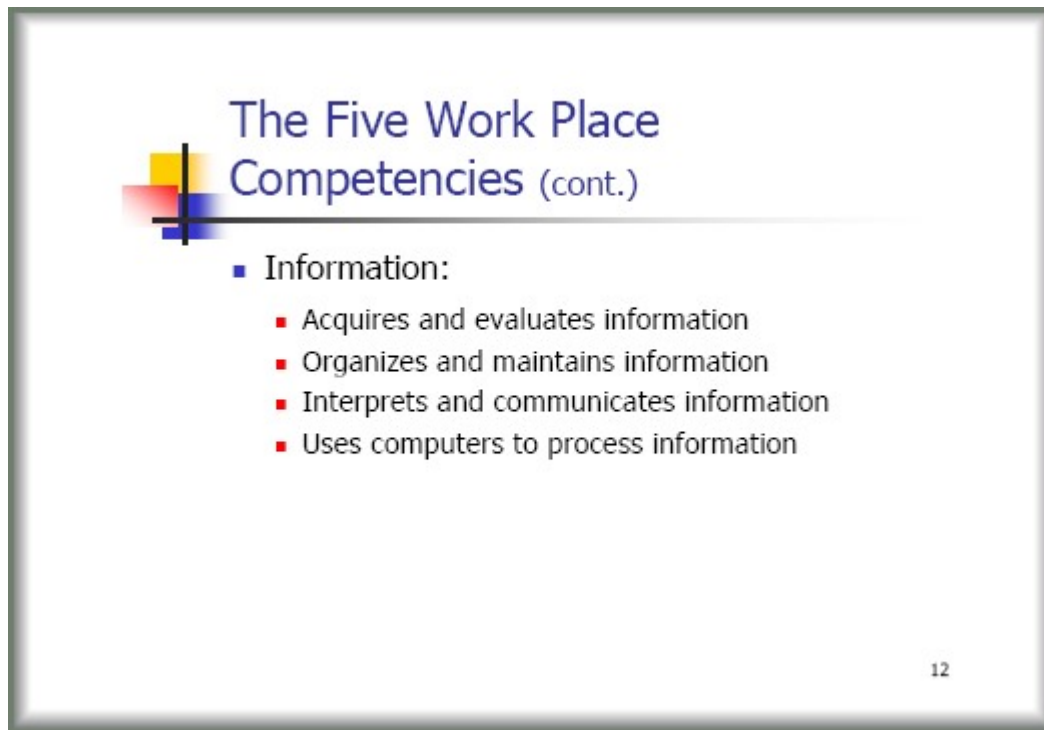
- Resources:
 - Allocates time
 - Money
 - Material and facility resources
 - Human resources

11

Notes:

Ask participants to review the Resources with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?

Module Three Slide 12:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'The Five Work Place Competencies (cont.)' is centered at the top in a blue font. Below the title, a horizontal line separates it from a bulleted list. The list item 'Information:' is preceded by a blue square, and its four sub-points are preceded by red squares. The number '12' is located in the bottom right corner of the slide frame.

The Five Work Place Competencies (cont.)

- Information:
 - Acquires and evaluates information
 - Organizes and maintains information
 - Interprets and communicates information
 - Uses computers to process information

12

Notes:

Ask participants to review the Information with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?

Module Three Slide 13:



The Five Work Place Competencies (cont.)

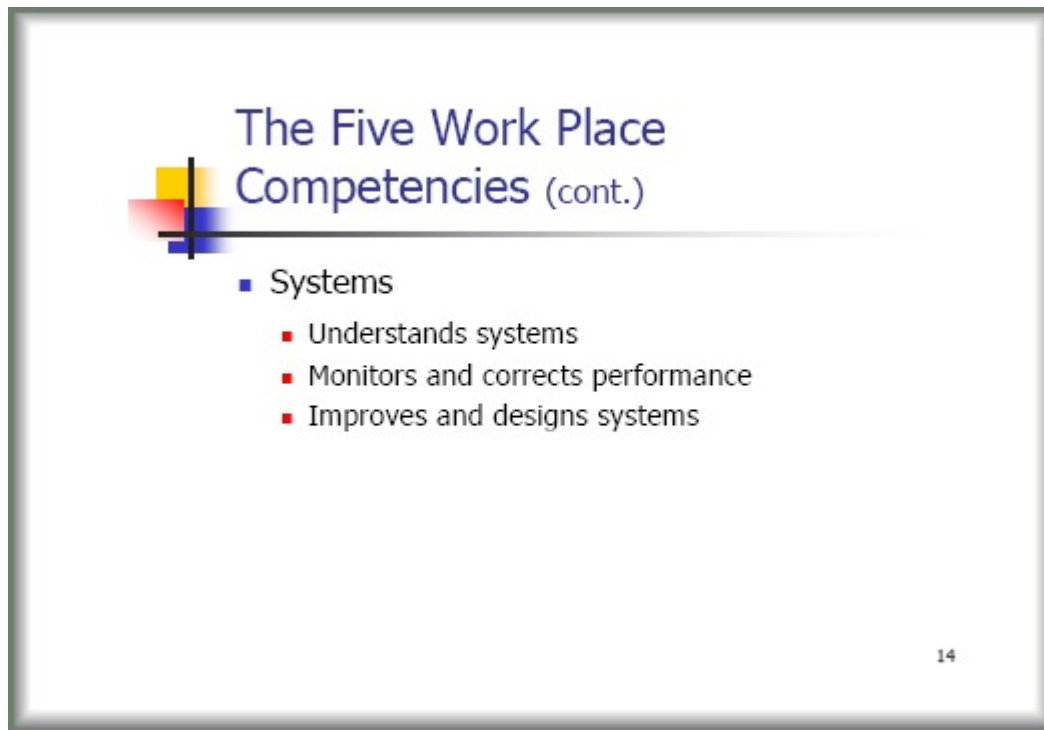
- Interpersonal:
 - Participates as a team member
 - Teaches others
 - Serves clients and customers
 - Exercises leadership
 - Negotiates to arrive at a decision
 - Works with cultural diversity

13

Notes:

Ask participants to review the Interpersonal skills with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?

Module Three Slide 14:



The Five Work Place Competencies (cont.)

- Systems
 - Understands systems
 - Monitors and corrects performance
 - Improves and designs systems

14

Notes:

Ask participants to review Systems Skills with their caseload in mind. What, if any, are their concerns about the youth they are currently serving?

Module Three Slide 15:



Notes:

1. This slide identifies the Technology competency and associated behaviors.
2. Explain that the five work place competencies are also considered to be entry-level requirements.
3. Remind participants that previously menial jobs like hotel bellman and office maintenance are examples of jobs that now require more thinking and include all of the competencies.

TRAINER STOP

CONDUCT EXERCISE I FOLLOWED IMMEDIATELY BY EXERCISE II



TRAINING INSTRUCTIONS: MODULE THREE

EXERCISE OVERVIEW



Training Instruction

Conduct exercise following the presentation of slides 1-15 – approximate total times:

- 10 minutes to prepare for exercise
- 25 minutes to conduct
- 15 minutes for group reports
- 10 minutes for whole group discussion

Exercise Overview

The objectives of this exercise are for trainees to:

- Think through the role of case manager in providing economic information to youth
- Think through their role in communicating youth's work-related interests and expectations to employers

Participant Materials:

- Module Three Exercise I instructions
- Youth Economic Presentation
- Employer Economic Presentation
- Flipchart and markers



TRAINING INSTRUCTIONS: MODULE THREE

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into 4 groups. Each group will need flipchart paper and markers. • Give each participant the Exercise I instructions handout. • Direct each group to the Notes at the beginning of their exercise instructions to place the exercise in context. • Assign two groups the Youth Presentation Scenario; assign the other two groups the Employer Presentation Scenario. • Review the instructions on the exercise handouts carefully • As groups to report from their flipcharts. • Ask participants what they learned or refreshed themselves on from the exercise that they can apply in their work? 	<p>If there are participants with labor market experience, ask them to sit with different groups to spread the knowledge around.</p> <p>You may read instructions aloud to the groups.</p> <p>If you only have enough participants for two groups (vs. four) tell them to ignore Step 3 and go on to Step 4 (report to the whole group). In this case you can shorten the exercise time by about 10 minutes.</p> <p>Check with the group to make sure they understand the directions: They are to develop an outline of a presentation; meet with another group doing the same thing and combine their ideas into one outline to present to the whole group.</p> <p>Some sample ideas to listen for:</p> <p>Youth Presentation:</p> <ul style="list-style-type: none"> • Basic labor market information • Youth knowledge of the labor market • How to access economic and workforce information • Provide handouts <p>Employer Presentation:</p> <ul style="list-style-type: none"> • Introduction – who we are • Describe youths’ interests • Find out about employer expectations



TRAINING INSTRUCTIONS: MODULE THREE

PARTICIPANT HANDOUT #1

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Exercise I Instructions For Groups 1 and 2

Youth Presentation Note: The One-Stop system has expanded the case manager role to serve the public more generically, which has placed a new requirement on them to have workforce economic information experience. Most case managers haven't focused as much on labor market information as on the helping role and now must think through how they can get and use that expertise.

Step 1: Read the following scenario:

You are conducting a small group orientation to the world of work. The participants are new to the program and are in the assessment phase (TABE testing, individual interviews, etc.) This is a chance for you to connect them with the opportunities that are available in their community and with your methods of determining how to approach future planning with them.

Step 2: Using a flipchart, develop an outline for a comprehensive economic analysis and workforce information presentation. In the outline identify the information you want to cover and the various tools you would use. Feel free to use bullets and brief phrases.

Step 3: Be prepared to meet with the other group working on this scenario to merge your ideas.

Step 4: Report to the whole group.

Time: 25 minutes; 3 minute report



TRAINING INSTRUCTIONS: MODULE THREE

PARTICIPANT HANDOUT #2

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Exercise I Instructions For Groups 3 and 4

Employer Presentation Note: The workplace is improved when employers and employees are mutually aware of each others' concerns and expectations. This is as true for youth as it is for adults. Performance expectations for placement and retention are impacted by the case manager's level of sophistication around economic analysis, including communicating to employers about youth and vice versa.

Step 1: Read the following scenario: *Your organization holds a quarterly breakfast meeting with local employers in order to exchange information about available work and potential employees. Because you have been holding group orientation sessions throughout the previous quarter, you have learned a great deal about the interests and expectations of the youth in your program in relation to obtaining and maintaining employment. The Executive Director believes that these breakfast meetings are the perfect venue for you to share these interests and expectations constructively and anonymously for the purpose of: 1) determining how we might better prepare these youth for the workforce, and 2) how case managers can effectively advocate youth interests and expectations to employers.*

Step 2: Using a flipchart, develop an outline for a five-minute presentation to the employers. Use your experience as a case manager to develop and describe typical youth participants' work-related interests and expectations. Feel free to use bullets and brief phrases.

Step 3: Be prepared to meet with the other group working on this scenario to merge your ideas.

Step 4: Report to the whole group.

Time: 25 minutes; 3 minute report



TRAINING INSTRUCTIONS: MODULE THREE

EXERCISE II OVERVIEW

Training Instructions

Following Exercise I – Youth & Employer Presentations:

Approximate Times:

- 10 minutes to prepare for exercise
- 20 minutes to conduct
- 15 minutes for group reports
- 10 minutes for whole group discussion

Exercise Overview

The objectives of this exercise are for trainees to: Practice providing economic analysis and workforce information and tools to youth.

Participant Materials

- Module Three Exercise II instructions
- Kimberly & Clarence profiles
- Flipchart paper and markers



TRAINING INSTRUCTIONS: MODULE THREE

EXERCISE II

Training Instructions	Training Notes
<ol style="list-style-type: none">1. Participants can stay in the groups from Exercise I. Each group will need flipchart paper and markers and the Kimberly and Clarence profiles.2. Review the instructions on the Exercise II handouts carefully.3. Ask groups to report from their flipcharts.4. Ask participants what they learned or refreshed themselves on from the exercise that they can apply in their work.	<p>Check with each group to be sure they understand the instructions.</p> <p>Remind them that they have been meeting regularly with Kimberly and Clarence (from other Modules) and are encouraged to draw on previous discussions about them.</p>



TRAINING INSTRUCTIONS: MODULE THREE

PARTICIPANT HANDOUT #3

EXERCISE II INSTRUCTIONS FOR PARTICIPANTS

In small groups:

- Choose either Kimberly or Clarence
 1. What do you believe is relevant economic information for them?
 2. Which tools will you use with them?
- Put your answers on a flipchart and be prepared to report to the whole group.

Time: 20 minutes to conduct
3 minutes to report

IMPLEMENTING THE CASE PLAN/INDIVIDUAL SERVICE STRATEGY (ISS) AND MONITORING OUTCOMES

Training Methodology: PowerPoint, large and small group work

Time: 3 hours

Materials

- Computer with PowerPoint
- PowerPoint handouts
- Hard copies of the Manual
- Module Four Exercise Handouts

PowerPoint Slides

- Slide 1: Module Four: Implementing the Case Plan/Individual Service Strategy (ISS) and Monitoring Outcomes
- Slide 2: Module Four Objectives
- Slide 3: Purpose
- Slide 4: Identifying Appropriate Services
- Slide 5: Convening the Players
- Slide 6: Connecting the Youth with Services
- Slide 7: Preparing the Young Person
- Slide 8: Pre-appointment Reminders
- Slide 9: Following up after the Appointment
- Slide 10: Monitoring Services
- Slide 11: Monitoring Services, continued
- Slide 12: Motivating and Encouraging
- Slide 13: Motivating and Encouraging, continued
- Slide 14: Motivating and Encouraging, continued
- Slide 15: Recognition System
- Slide 16: Possible Milestones - Tangible Recognition



- Slide 17: Special Challenges
- Slide 18: Time Management Tips
- Slide 19: Situational Leadership Model
- Slide 20: Direct/Coach Youth Needing High Support
- Slide 21: Encourage Youth Needing Medium Support
- Slide 22: Encourage and Delegate to Youth Needing Low Support



Suggested Training Outline

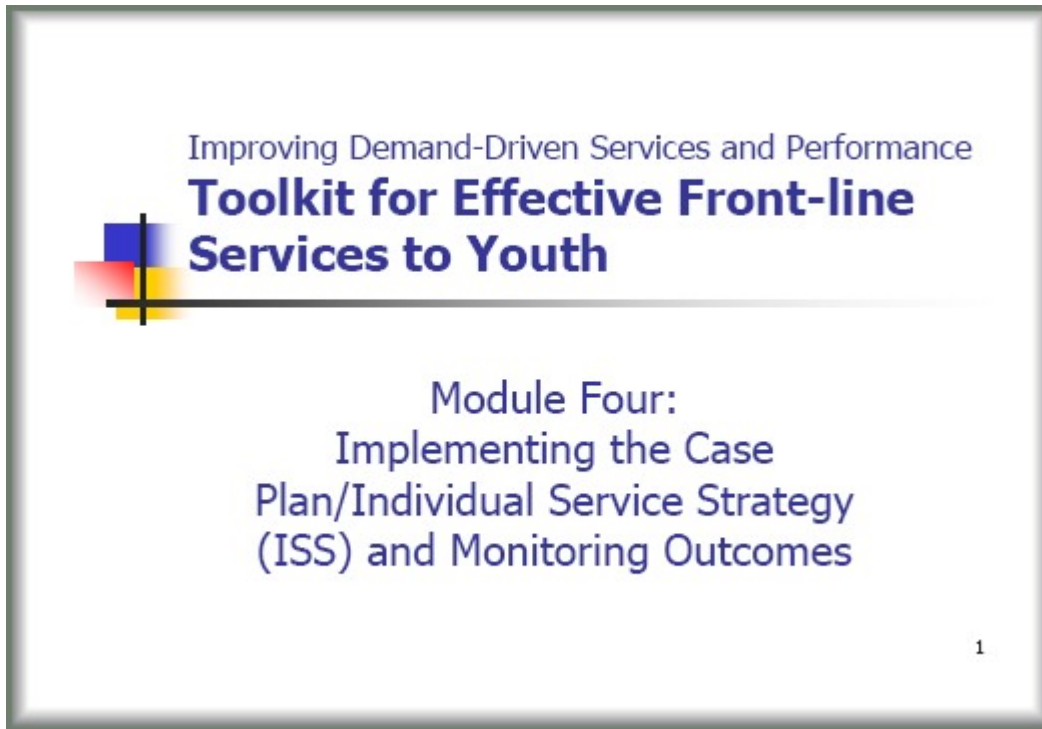
Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the Toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of the Manual – Hard copies of the slides
15 minutes	<ul style="list-style-type: none"> • Present Module Four Slides 1-9 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise I Linking/Brokering <ul style="list-style-type: none"> – Form 4 small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions – Kimberly and Clarence profiles from Module One
30 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	
10 minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 minutes	<ul style="list-style-type: none"> • Present Module Four Slides 10-12 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise II: Understanding Motivation <ul style="list-style-type: none"> – instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions
20 minutes	<ul style="list-style-type: none"> • Conduct Exercise II 	<ul style="list-style-type: none"> – Exercise instructions – Kimberly and Clarence profiles from Module One
20 minutes	<ul style="list-style-type: none"> • Group reports and whole group of exercise 	
10 minutes	<ul style="list-style-type: none"> • Present Module Four Slides • 13-17 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise III: Recognition and Motivation <ul style="list-style-type: none"> – Instruct Exercise 	
10 minutes	<ul style="list-style-type: none"> • Conduct Exercise III 	
20 minutes	<ul style="list-style-type: none"> • Individual and whole group discussion of exercise 	

10 minutes	<ul style="list-style-type: none"> • Present Module Four Slides • 13-17 	
10 minutes	<ul style="list-style-type: none"> • Prepare for Exercise III: Recognition and Motivation – Instruct Exercise 	
10 minutes	<ul style="list-style-type: none"> • Conduct Exercise III 	
20 minutes	<ul style="list-style-type: none"> • Individual and whole group discussion of exercise 	
10 minutes	<ul style="list-style-type: none"> • Present Module Four Slides 18-22 	
10 minutes	<ul style="list-style-type: none"> • Close Module Four – Feedback on today – Next Module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
<p>Total expected training time: 3 hours +/-</p>		



MODULE FOUR IMPLEMENTING THE CASE PLAN/INDIVIDUAL SERVICE STRATEGY (ISS) AND MONITORING OUTCOMES

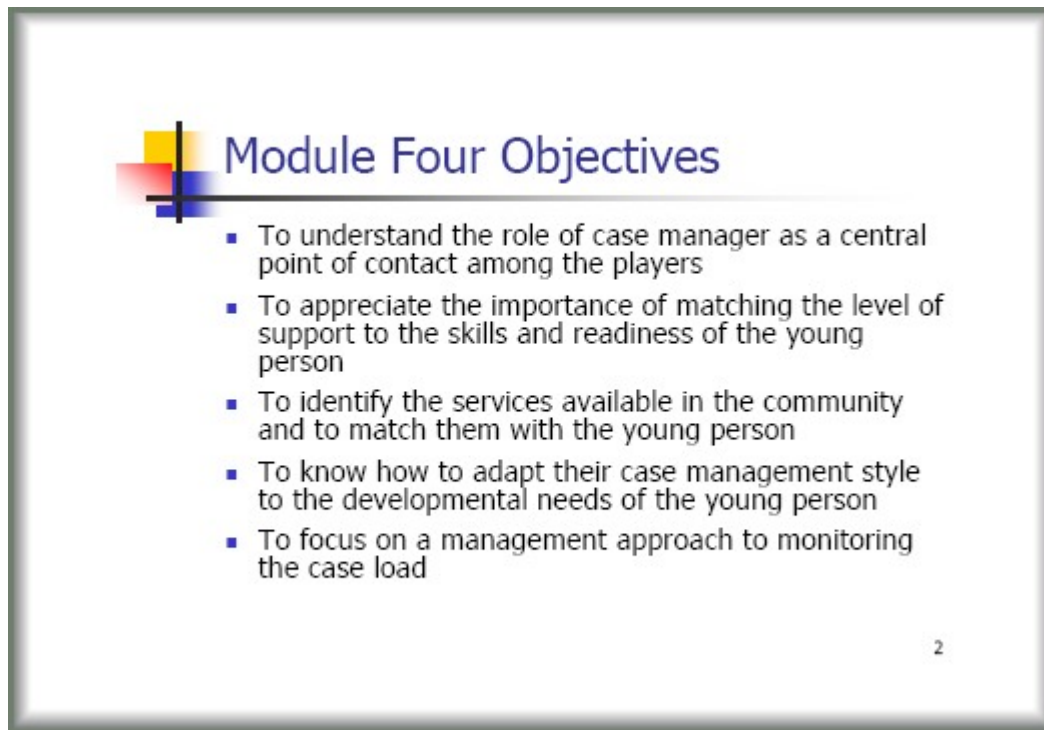
Module Four Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [Materials/PowerPoint Slides List](#)
- Trainer see [Suggested Training Outline](#)

Module Four Slide 2:

A presentation slide titled "Module Four Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide contains a bulleted list of five objectives and a small number "2" in the bottom right corner.

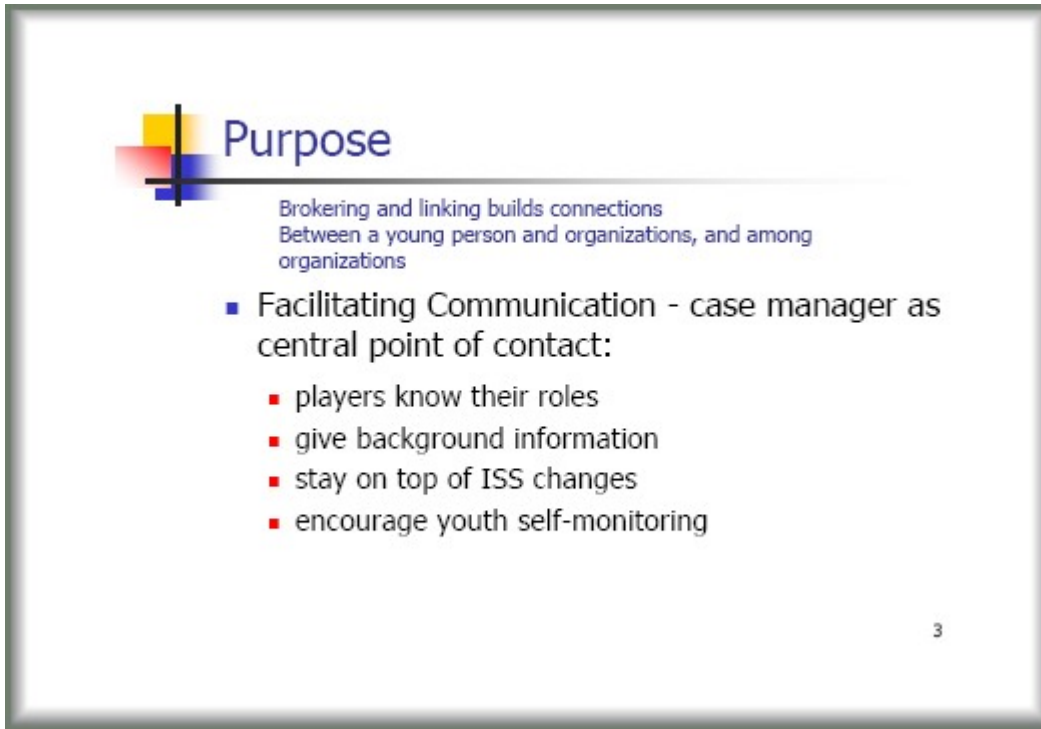
Module Four Objectives

- To understand the role of case manager as a central point of contact among the players
- To appreciate the importance of matching the level of support to the skills and readiness of the young person
- To identify the services available in the community and to match them with the young person
- To know how to adapt their case management style to the developmental needs of the young person
- To focus on a management approach to monitoring the case load

2

Notes:

Module Four Slide 3:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The word "Purpose" is written in a large, blue, sans-serif font. Below it, the text "Brokering and linking builds connections Between a young person and organizations, and among organizations" is displayed in a smaller, blue, sans-serif font. A bulleted list follows, with a blue square bullet for the main point and red square bullets for sub-points. The number "3" is located in the bottom right corner of the slide.

Purpose

Brokering and linking builds connections
Between a young person and organizations, and among
organizations

- Facilitating Communication - case manager as central point of contact:
 - players know their roles
 - give background information
 - stay on top of ISS changes
 - encourage youth self-monitoring

3

Notes:

1. Emphasize that the complexity of preparing young people to be employable requires dynamic partnerships among a variety of sources and community systems.
2. Case managers, as the connectors or central point of contact, are critical to the success of these partnerships working with and for a young person.

Module Four Slide 4:



Identifying Appropriate Services

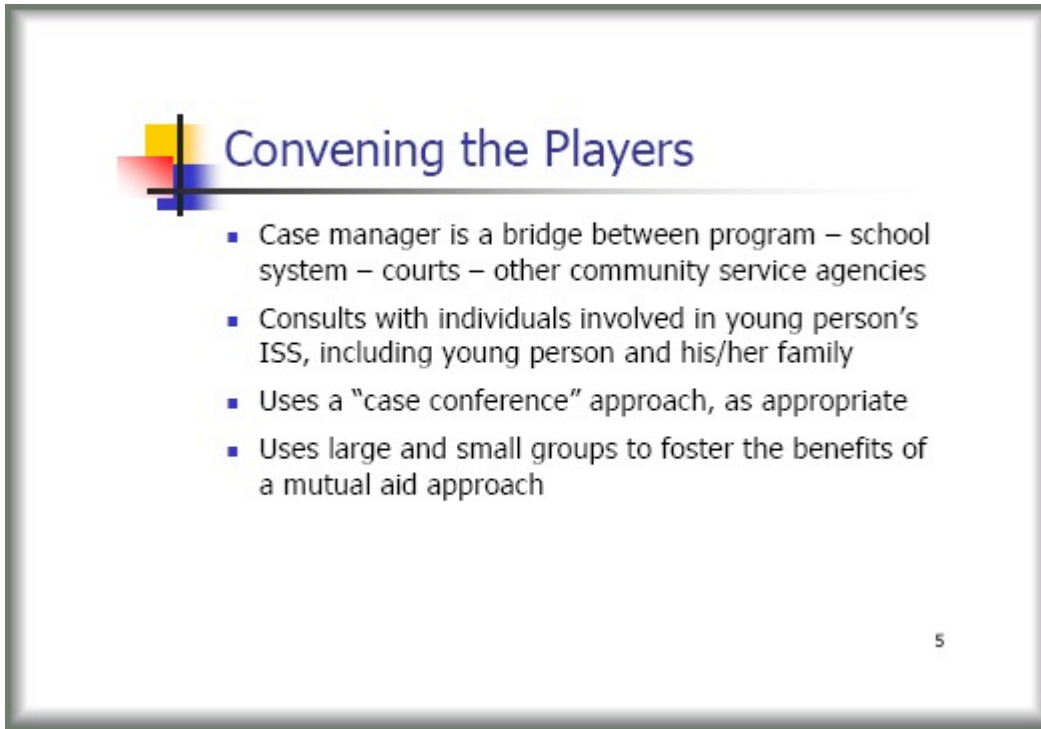
- Case manager as broker, advocate for youth, ensures s/he receives needed services
- Case manager's organization should identify community services meeting criteria, e.g. accessibility and effectiveness
- Case manager knows services that are available
- Case manager's role in identifying services is vital

4

Notes:

1. Point out that the quality of a case management system is largely determined by the number and quality of resources available to assist the youth in their growth and development towards gainful employment.
2. Effective case managers are personally acquainted with the resources available. This is one of a case manager's SCANS competencies.
3. Effective case managers seek to match resources with youth needs and personalities.

Module Four Slide 5:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Convening the Players' is in a dark blue font. Below the title is a bulleted list of four points. The number '5' is in the bottom right corner of the slide frame.

Convening the Players

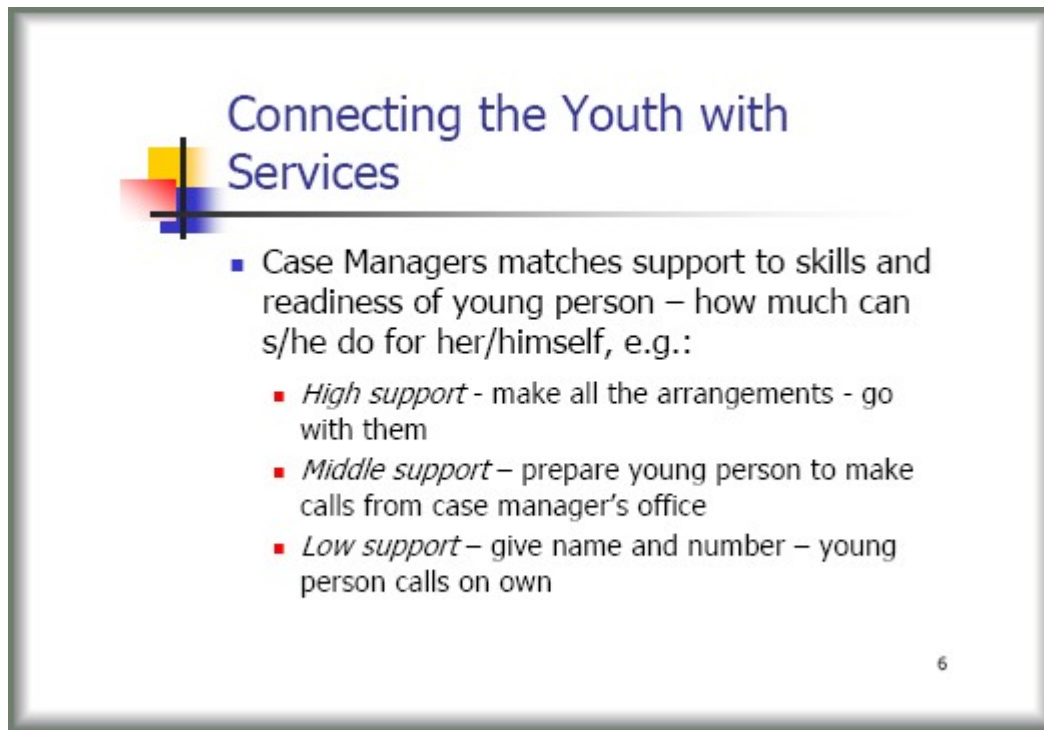
- Case manager is a bridge between program – school system – courts – other community service agencies
- Consults with individuals involved in young person's ISS, including young person and his/her family
- Uses a "case conference" approach, as appropriate
- Uses large and small groups to foster the benefits of a mutual aid approach

5

Notes:

1. Effective coordination is another major case management skill. Coordination cannot be taken for granted. It does not occur simply by getting everyone "to the table".
2. Point out that there are many methods of coordination.
3. Hold a brief discussion regarding any challenges case managers have in exercising their coordination function.

Module Four Slide 6:



Connecting the Youth with Services

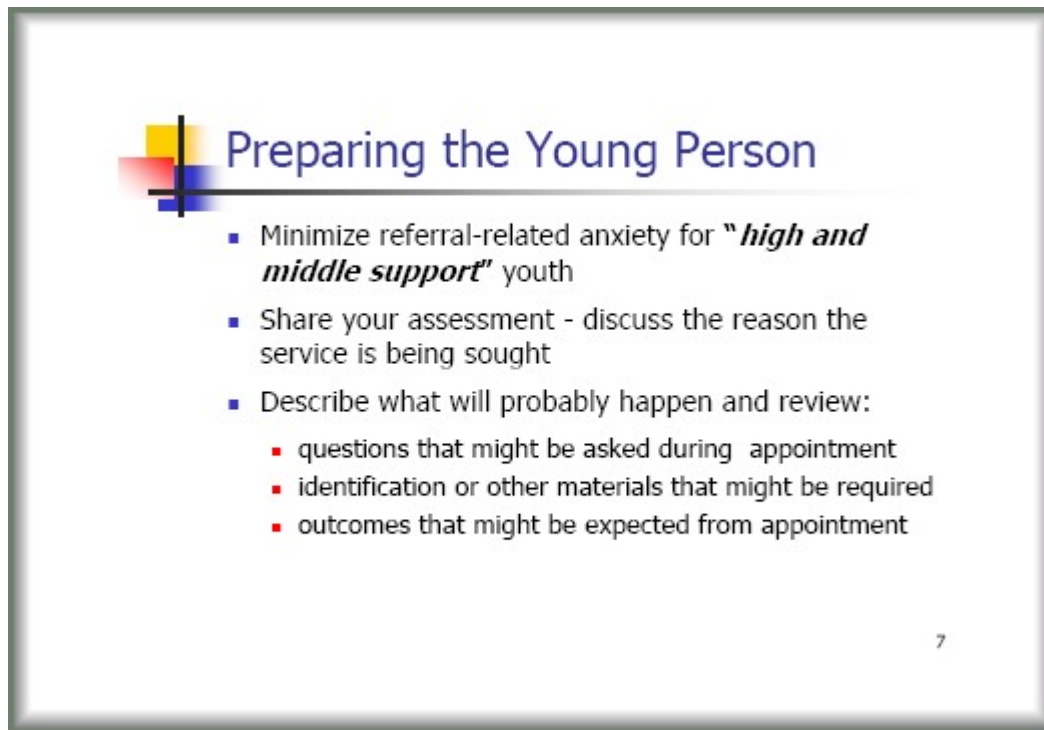
- Case Managers matches support to skills and readiness of young person – how much can s/he do for her/himself, e.g.:
 - *High support* - make all the arrangements - go with them
 - *Middle support* – prepare young person to make calls from case manager’s office
 - *Low support* – give name and number – young person calls on own

6

Notes:

1. Re-emphasize that case management is not case work.
2. Effective case managers assess and organize their caseloads in terms of the level of support individuals require to complete expectations and reach goals.
3. It is critically important to allow young people to do what they can for themselves. This strengthens their individual capacities and reduces unnecessary or unhealthy dependency on the case manager.

Module Four Slide 7:



Preparing the Young Person

- Minimize referral-related anxiety for “*high and middle support*” youth
- Share your assessment - discuss the reason the service is being sought
- Describe what will probably happen and review:
 - questions that might be asked during appointment
 - identification or other materials that might be required
 - outcomes that might be expected from appointment

7

Notes:

1. Point out that linking young people to various services is easiest when they clearly understand why the particular services are necessary for them and what will happen when they get there.
2. In most instances, the more knowledge they have about a new engagement, the less anxiety they will experience.

Module Four Slide 8:

Pre-Appointment Reminders

- **High support** - Contact young person the day before appointment to remind and address last minute misgivings
- **Middle support** – case manager should use judgment regarding pre-appointment calls; objective is to help youth to succeed as opposed to fail
- Ask youth to call immediately after the appointment to share how it went

8

Notes:

1. Effective case managers want to minimize no-shows. Point out that other high performing systems use pre-appointment reminders (e.g. doctors, dentists).
2. Clarify that it is human nature to avoid anything that causes high anxiety. Therefore, case managers need to carefully monitor young peoples' anxiety about various connections they have to make.
3. Point out that the primary purpose of the youth calling after the appointment is to determine if you have done an adequate job in linking them. Permitting them to express themselves freely about the experience is empowering for them and vitally informative for the case manager, particularly regarding attempting future connections.

Module Four Slide 9:



Following-up After the Appointment

- Contact young person if he/she fails to contact you
- Contact organization to:
 - Confirm appointment was kept or re-schedule if not kept
 - Identify what happened from their perspective
- Determine next steps

9

Notes:

1. Emphasize that the linkage, not compliance is the objective. There are lots of legitimate reasons why a young person might not view the new service system in the same positive way that the case manager does.
2. Point out that working through a difficult linkage can be an excellent process of partnership development between the case manager and the young person.

TRAINER STOP

**CONDUCT MODULE FOUR EXERCISE 1 –
THEN CONTINUE PRESENTATION WITH THE REMAINING SLIDES.**

Module Four Slide 10:



Monitoring Services

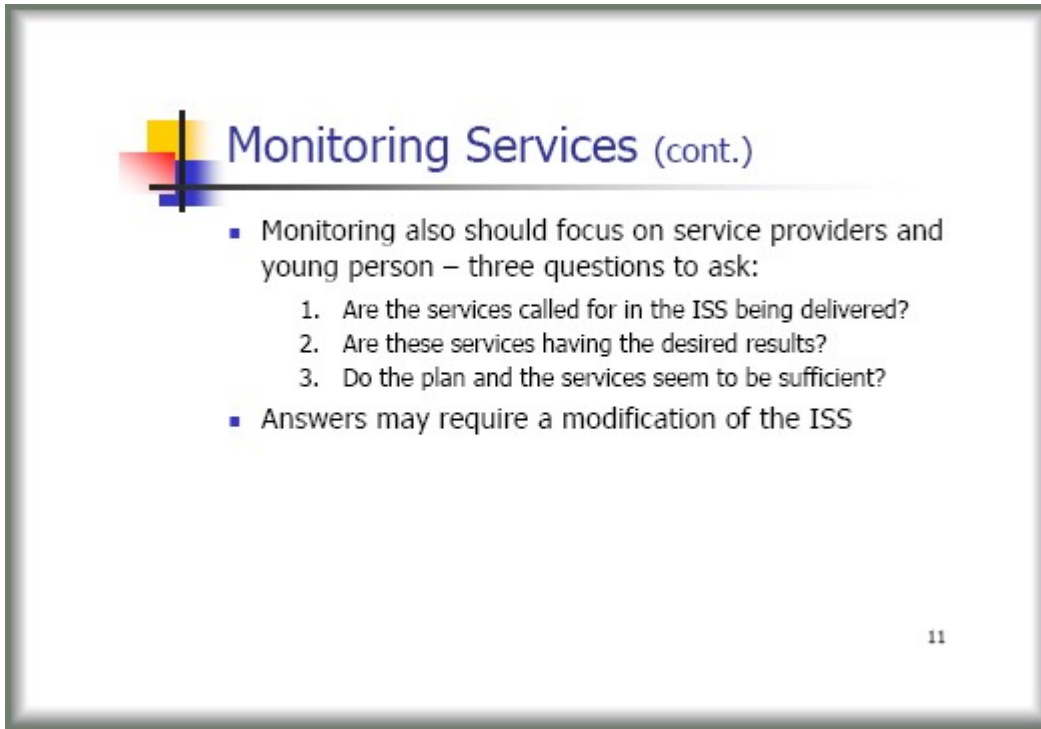
- Monitor service delivery to:
 - assure that needed services are being provided
 - verify that the service plan is being properly carried out, results are being achieved - revise ISS as needed
 - assist with problems
 - maintain the youth/case manager partnership, and
 - provide encouragement and nurture motivation


10

Notes:

1. Clarify that just because a successful linkage has been made, it is not a given that the desired service goals will be achieved. The work of the case manager as the coordinator of services has only begun.
2. In many cases the service will be developmental so careful attention must be given to both the process and the outcome.
3. Point out that when the case manager fails to be the connector or pivot of services a loss of focus is highly probable and successful goal achievement might be compromised.

Module Four Slide 11:



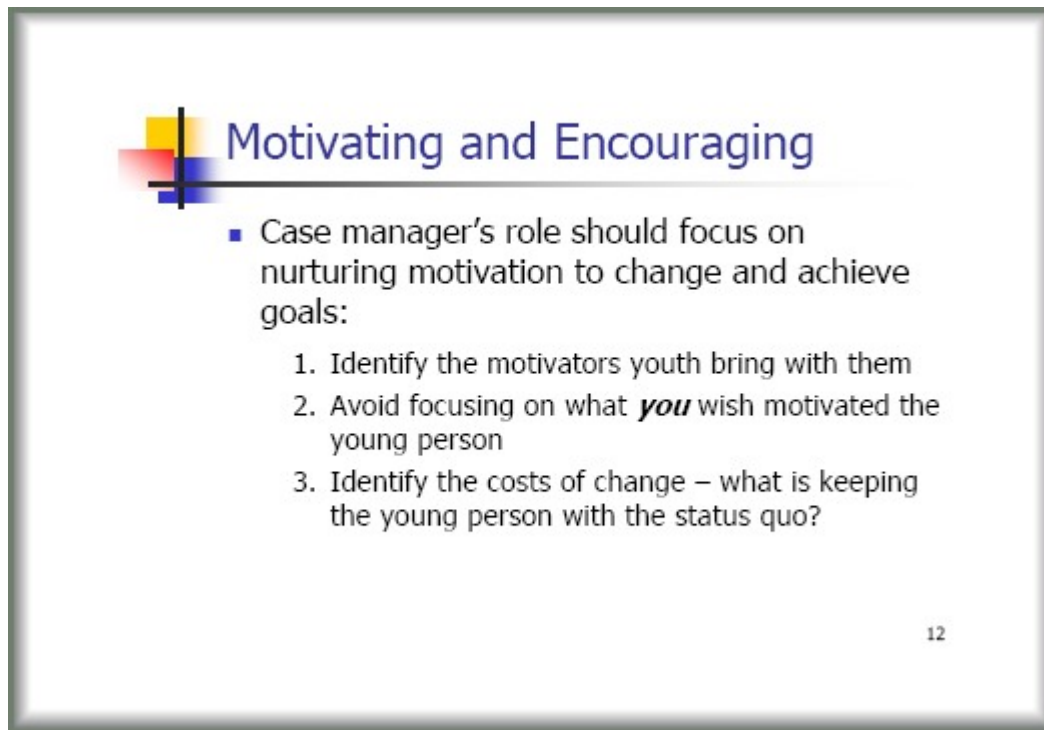
 **Monitoring Services (cont.)**

- Monitoring also should focus on service providers and young person – three questions to ask:
 1. Are the services called for in the ISS being delivered?
 2. Are these services having the desired results?
 3. Do the plan and the services seem to be sufficient?
- Answers may require a modification of the ISS

11

Notes:

Module Four Slide 12:



Motivating and Encouraging

- Case manager's role should focus on nurturing motivation to change and achieve goals:
 1. Identify the motivators youth bring with them
 2. Avoid focusing on what *you* wish motivated the young person
 3. Identify the costs of change – what is keeping the young person with the status quo?

12


Notes:

1. Point out that even though motivation comes from within an individual, it can be nurtured. It is possible to help a person develop interest (want to) and belief (can do), the two components of motivation:
 - a. Wanting something more than you want anything else; and
 - b. Believing that you can get, accomplish, or achieve it. (Research on youth motivation).
2. Being where the person is," a fundamental principle of helping, is extremely important in nurturing motivation. This is a time when case managers need to listen and seek to "walk in the young person's shoes."
3. Case managers who are open to understanding the "risks" of their program for the young person are more likely to reach them and nurture motivation within them.

TRAINER STOP

**CONDUCT MODULE FOUR EXERCISE II –
THEN CONTINUE SLIDE PRESENTATION**

Module Four Slide 13:



Motivating and Encouraging (cont.)


4. Show youth how the things that motivate *them* can be achieved through a specific program
5. Prepare and help youth cope with the costs of change
6. Use external motivators (recognition system) to stimulate and strengthen internal motivators
7. Structure success experiences
8. Praise success, even small ones

13

Notes:

1. Review the slide points 4-8 and ask for examples of how others may be doing these things.
2. Encourage trainees to review their specific programs and assess adequacy in regards to motivation.

Module Four Slide 14:



Motivating and Encouraging (cont.)

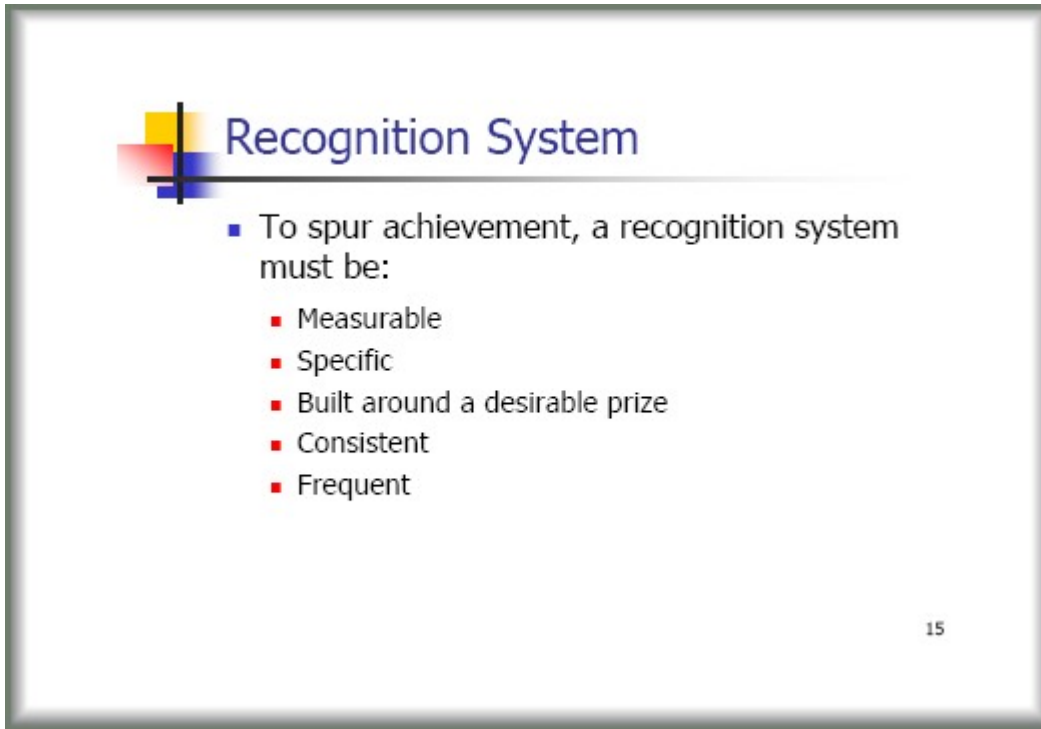
9. Approach both successes and failures as positive learning experiences – study them for their lessons
10. Use tangible incentives to reward success
11. Constantly reinforce motivators that brought them there in the first place
12. Provide a support network – including small groups

14

Notes:

1. Continue to review the list for examples.
2. Poll the group for ideas about activities that nurture motivation that they might use in the future.

Module Four Slide 15:



Recognition System

- To spur achievement, a recognition system must be:
 - Measurable
 - Specific
 - Built around a desirable prize
 - Consistent
 - Frequent

15

Notes:

1. Ask participants to conduct a brief discussion at their tables about successful and difficult experiences they have had with recognition systems i.e., what works and what doesn't work as well.
2. Ask them how their experiences relate to the five requirements presented on this slide.



Module Four Slide 16:



Possible Milestones	Tangible Recognition
<ul style="list-style-type: none"> ■ Perfect attendance ■ Demonstrating improvement ■ Positive attitude ■ Obtaining GED ■ Completing training ■ Acceptance into a college, training program, etc. ■ Gaining employment 	<ul style="list-style-type: none"> ■ Certificate ■ Personal note/card ■ Letter of reference to employer ■ Photo etc. on a "Wall of Fame" bulletin board ■ Cash/Gift Certificates ■ Points to redeem for merchandise ■ Travel ■ Student of the week/month ■ Leadership opportunities ■ Participating in graduation ceremony

16

Notes:

1. Review the list presented. Check to see which of these trainees use and how well they seem to work.
2. Ask the group for any additional tangible recognitions they might use.

Module Four Slide 17:



Notes:

1. Throughout the case management experience it is important to keep high expectations for young peoples' growth and development on the front burner with them.
2. Case managers are not less caring when they won't tolerate less than adequate performance or less than acceptable behavior.
3. Appropriate standards for behavior are determined by the workplace. Encourage youth to explore and establish these standards themselves.
4. When they fall short of expectations make sure there is a process for them to redeem themselves or redress grievances.

TRAINER STOP

**CONDUCT MODULE FOUR EXERCISE III – THEN CONTINUE WITH
PRESENTATION OF SLIDES**

Module Four Slide 18:

Time Management Tips

- Unmanageable case loads mean efficiencies are needed
- Use "triage" to identify high-risk youth who need high support, use:
 - assessment results
 - case notes
 - participant interviews

Low Support – Medium Support – High Support

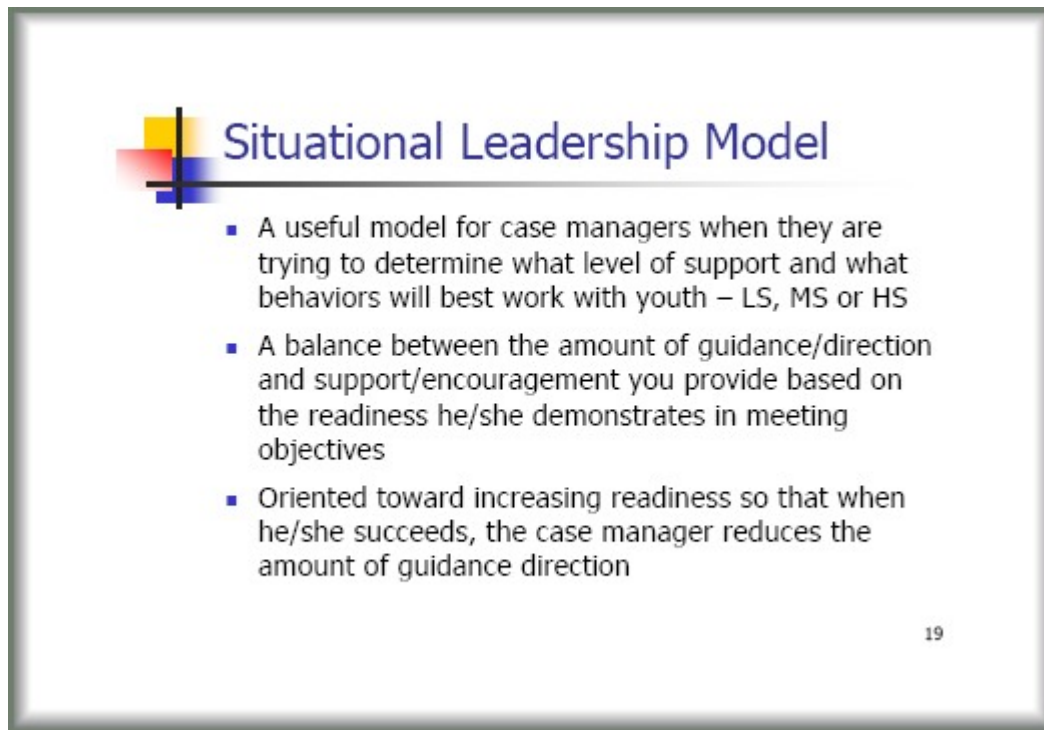
LS MS HS

18

Notes:

1. Emphasize the word management in case management is intentional. Case managers are expected to approach their case loads in a systematic way, applying thinking and problem solving skills to meet performance expectations.
2. Point out that they should be giving the most needy the most attention.
3. Emphasize that organizing their case load using the Low Support, Medium Support, High Support categories fosters independence, and emphasized the partnership between case managers and youth. It also reverses the current trend of giving the most attention to those who already have more.

Module Four Slide 19:



Situational Leadership Model


- A useful model for case managers when they are trying to determine what level of support and what behaviors will best work with youth – LS, MS or HS
- A balance between the amount of guidance/direction and support/encouragement you provide based on the readiness he/she demonstrates in meeting objectives
- Oriented toward increasing readiness so that when he/she succeeds, the case manager reduces the amount of guidance direction

19

Notes:

1. “Situational Leadership” is a well-known management model that reinforces the supporting role of case manager. Its message is to assess where the young person is developmentally and to target your energies and efforts appropriately.
2. Review the three points on the slide and check for questions or examples of how participants are currently using this model – even if unconsciously.

Module Four Slide 20:



Direct/coach youth needing high support


They, for example:	You, for example:
<ul style="list-style-type: none">▪ Have no or low commitment to career goal▪ Skills are extremely low▪ Major personal problems▪ Friends/family discouraging▪ Unstable/unreliable – housing; child care; transportation	<ul style="list-style-type: none">▪ Define roles▪ Provide specific instructions – what, how, when, and where▪ Closely supervise▪ Engage in two-way communication; provide opportunities for input▪ Lead with your own ideas

20

Notes:

Review the lists and check for understanding.

Module Four Slide 21:



Encourage youth needing medium support


They, for example:	You, for example:
<ul style="list-style-type: none">▪ Show interest in career goal▪ Will struggle to learn skills but achievable▪ Has personal problems but getting help▪ Friends/family not discouraging▪ Stable/reliable housing; child care; transportation	<ul style="list-style-type: none">▪ Provide recognition▪ Listen and facilitate▪ Ask for suggestions or input▪ Discuss problems but encourage them to identify solutions▪ Lower emphasis on direction – higher on supporting and encouraging

21

Notes:

Review the two lists and check for understanding.

Module Four Slide 22:



Encourage and delegate to youth needing low support

They, for example:	You, for example:
<ul style="list-style-type: none">▪ Have strong, clear career goal▪ Can realistically learn the skills▪ Personal life under control▪ Support from family/ friends▪ Stable/reliable housing; child care; transportation	<ul style="list-style-type: none">▪ Support his/her decision making and problem solving▪ Provide recognition▪ Listen and facilitate▪ Encourage independent actions▪ Provide minimal direction

22

Notes:

Review the two lists and check for understanding.



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE I OVERVIEW



Training Instruction

Conduct exercise following the presentation of slides 1-9 – approximate total times:

- 10 minutes to prepare for exercise
- 30 minutes to conduct
- 10 minutes for whole group discussion

Exercise Overview

The objectives of this exercise are for trainees to practice/learn:

- Identifying the appropriate services for linking to young people's needs
- Learning how to minimize a young person's anxiety about referrals
- Determining the adequacy of the linkage through follow-up

Participant Materials

- Module Four Exercise I Instructions
- Kimberly and Clarence profiles
- Flipchart paper and markers



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none">• Divide participants into small groups• Give each participant the Exercise Instructions handouts and walk them through the instructions for steps 1, 2, and 3.• Ask participants what they learned or refreshed themselves on from the exercise that they can apply in their work?	<p>Be sure they have the Kimberly and Clarence profiles but only select one to practice on.</p> <p>Check with each group to be sure they understand the instructions:</p> <ul style="list-style-type: none">• Select either Kimberly or Clarence• Identify two service organizations• Role play case manager and youth discussing referral



TRAINING INSTRUCTIONS: MODULE FOUR

PARTICIPANT HANDOUT #1

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Linking/Brokering

In your small group – select either Kimberly or Clarence.

Step 1: As a whole group, identify two service organizations with which you would link this young person in order to provide services needed.

Step 2: Select two group members, one to be the case manager, the other the selected young person (Kimberly or Clarence). The case manager conducts a meeting during which he or she:

- Shares the assessment that supports the linkage
- Prepares the youth for the experience – what would he or she need to know (use prompts from slide 7)
- Requests a feedback session following the first visit with an organization.

Step 3: Group members will provide feedback and discuss alternative approaches.

Time: 20 minutes; 10 minutes for feedback



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE II OVERVIEW

Training Instruction:

Following the presentation of slides 10-12 – approximate times:

- 10 minutes to prepare for exercise
- 20 minutes to conduct
- 20 minutes for reports and whole group discussion

Exercise Overview

The objectives of this exercise are for trainees to practice/learn:

- Identifying the potential risks (de-motivators) a young person might be taking by entering a workforce development program

Participant Materials

- Module Four Exercise II instructions
- Flip charts and markers



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE II

Training Instructions	Training Notes
<ol style="list-style-type: none"> 1. Divide participants into small groups. 2. Give each participant the Exercise Instructions handouts. 3. Direct participants group to the Note at the beginning of their exercise instructions to place the exercise in context. 4. Review the instructions. 5. Groups report. 6. Ask participants what they learned or refreshed themselves on from the exercise that they can apply in their work? 	<p>Groups can be as small as two people.</p> <p>Check with each group to be sure they understand the instructions:</p> <ul style="list-style-type: none"> • Work on their own first and then in their small group. • If time, ask them to generate solutions for some of the risks. • During the report out, listen for such risks as: <ul style="list-style-type: none"> – loss of friends – loss of free time – fear of change – ridicule from peers – loss of welfare benefits – embarrassment – sharing private/personal information – opening self to others' judgment – being able to handle it all/time management – not cool



TRAINING INSTRUCTIONS: MODULE FOUR

PARTICIPANT HANDOUT #2

EXERCISE II INSTRUCTIONS FOR PARTICIPANTS

Understanding Motivation Note: Case managers are often trying to “sell” young people on the advantages of their program. Take a moment to think about your program from the participant’s perspective. What are the personal risks a young person could be taking by deciding to partner with you?

Step 1: Working on your own, write down what you think would go on a young person’s individual **RISK LIST**.

Step 2: Work in your small group to compile a single list, eliminating redundancies.

You don’t have to agree!

Record group list on a flip chart

Be prepared to share the compiled list with the whole group

Time: 5 minutes to develop your individual list; 15 minutes to develop the group list; 3 minutes to report



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE III OVERVIEW

Training Instruction

Conduct Exercise III following the presentation of slides 13-17-approximate times:

- 10 minutes to prepare for exercise
- 10 minutes to conduct
- 20 minutes for brief individual reports and whole group discussion

Note: This is a whole group exercise in which each participant will describe his or her situation and types of recognition and rationales. The time for the exercise is determined by the number of participants.

Exercise Overview:

The objectives of this exercise are for trainees to practice/learn:

- Recognizing situations that warrant recognition
- Identify how to reward (motivate) appropriately

Participant Materials:

- Module Four Exercise III Instructions



TRAINING INSTRUCTIONS: MODULE FOUR

EXERCISE III

Training Instructions	Training Notes
<ol style="list-style-type: none"> 1. This is an individual exercise. Give each participant the Exercise instructions handouts. 2. Review the instructions to the whole group. 3. When all have completed the exercise (or after about 10 minutes) go around the room and ask each person to briefly describe his or her ideas and rationale. 4. Discuss the exercise with the whole group, for example: <ul style="list-style-type: none"> • Did they have difficulty coming up with ideas for recognition? • Have they tried the recognition before and if so how did it work? 	<p>Check for individual questions; they are to:</p> <ul style="list-style-type: none"> • work on their own to identify a situation that warrants recognition by a case manager; • Identify three types of recognition that might be appropriate to that situation <p>If the group is very large, to save time you can ask them to report to each other in small groups instead of individually.</p>



TRAINING INSTRUCTIONS: MODULE FOUR

PARTICIPANT HANDOUT #3

EXERCISE III INSTRUCTIONS FOR PARTICIPANTS

Recognition/Motivation – Individual Work

Individually, identify a situation that warrants recognition by a case manager and three types of recognition that might be appropriate.

Be prepared to discuss why you think that the recognition will be motivating to a young person. Consider what observation or feedback would confirm your thinking.

Note: This is a whole group exercise in which each participant will describe his or her situation and types of recognition and rationales. The time for the exercise is determined by the number of participants.

Time: 10 minutes to prepare; 5 minutes to present and discuss each situation



MODULE FIVE



FOLLOW-UP

Training Methodology: PowerPoint, large and small group work

Time: 2.5 hours +/-

Materials

- Computer with PowerPoint
- PowerPoint handouts
- Copies of the Manual (for each participant/trainee)
- Module Five Exercise handouts: Follow-Up Instructions

PowerPoint Slides

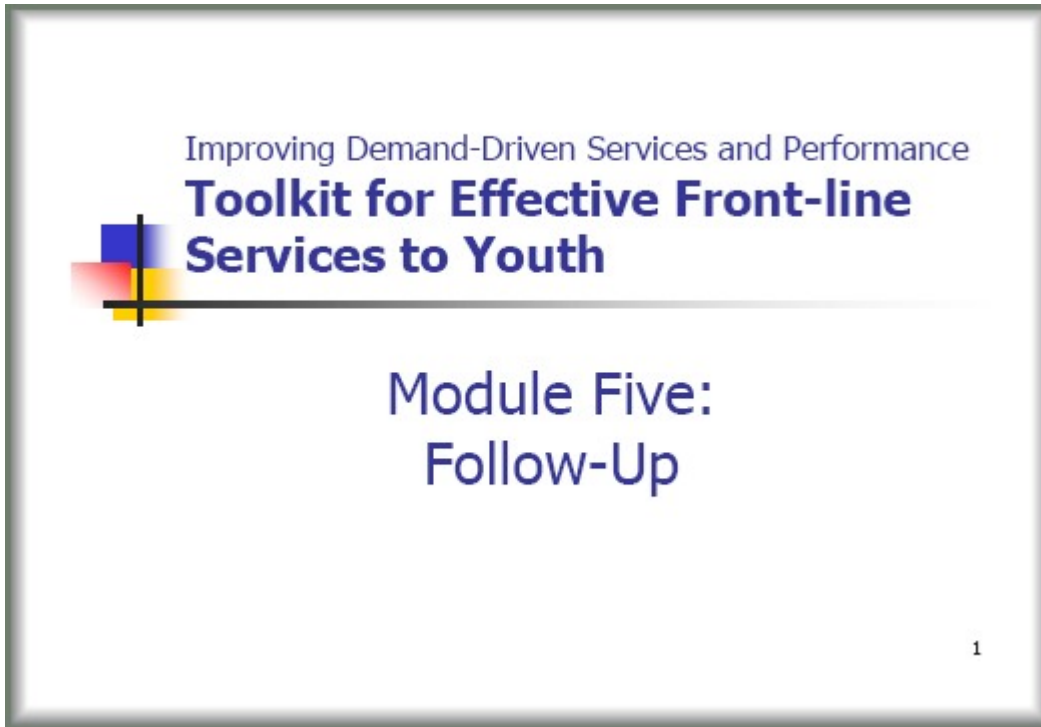
- Slide 1: Module Five - Follow-Up
- Slide 2: Module Five Objectives
- Slide 3: Purpose
- Slide 4: Types and Terms of Follow-Up
- Slide 5: Principles and Best Practices
- Slide 6: Meeting Total Needs
- Slide 7: Non-Intrusive Contact with Employers and School Staff
- Slide 8: Access to Better Jobs, Additional Education, and Continuing Youth Development
- Slide 9: Rapid Re-Employment Assistance
- Slide 10: Additional Follow-Up Best Practices

Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
30 minutes	<ul style="list-style-type: none"> • Module Five, Slide Presentation 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the manual
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise I Follow-up Questions: <ul style="list-style-type: none"> – Form small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions
30 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Flipcharts & markers – Chapter 5 in Manual
15 Minutes	<ul style="list-style-type: none"> • Group reports Exercise I 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 Minutes	(Suggested activities & materials) <ul style="list-style-type: none"> • Close Module Five <ul style="list-style-type: none"> – Feedback on today – Next module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
<p>Total expected training time: 2.5 hours +/-</p>		

MODULE FIVE FOLLOW-UP

Module Five Slide 1:

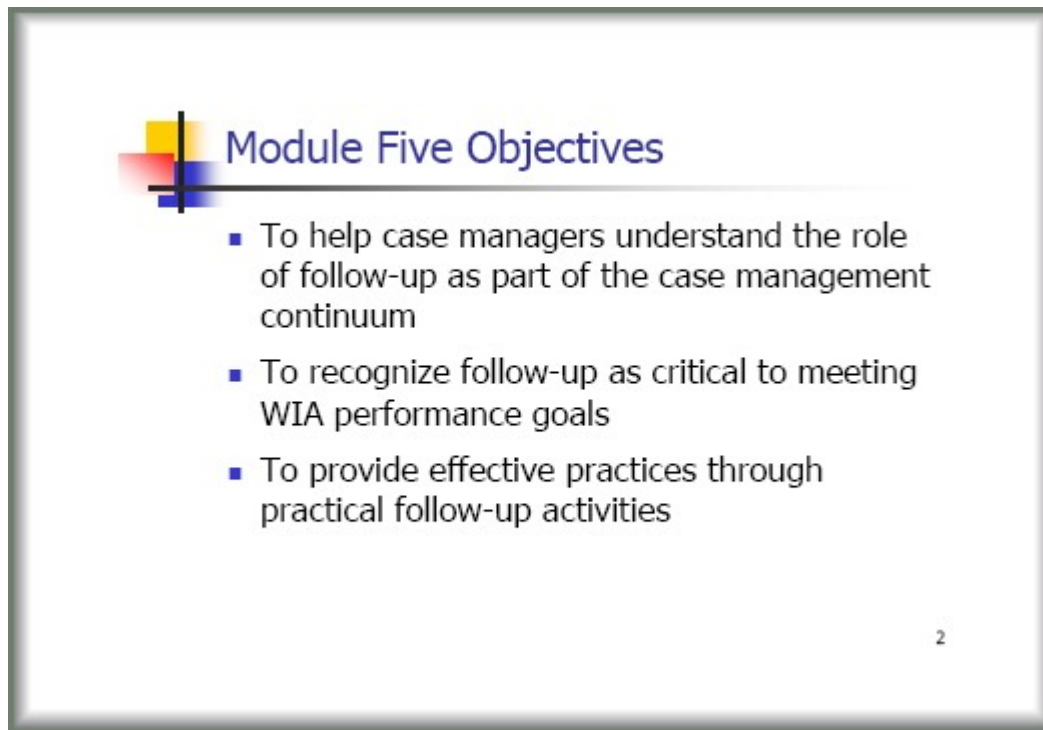


Notes:

- Trainer see [Training Methodology](#)
- Trainer see [Materials PowerPoint Slides List](#)
- Trainer see [Suggested Training Outline](#)



Module Five Slide 2:

A slide titled "Module Five Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide contains three bullet points and a page number "2" in the bottom right corner.

Module Five Objectives

- To help case managers understand the role of follow-up as part of the case management continuum
- To recognize follow-up as critical to meeting WIA performance goals
- To provide effective practices through practical follow-up activities

2

Notes:

This two-hour module addresses the all important follow-up requirements of case managers regarding WIA youth. It stresses the integration of follow-up within the overall case management approach.

Module Five Slide 3:

The slide features a decorative graphic on the left consisting of overlapping yellow, red, and blue squares with a black crosshair. The word "Purpose" is written in a blue, sans-serif font to the right of the graphic. Below the title is a horizontal line, followed by a bulleted list of four items. The first item is a blue square, and the subsequent three are red squares. The number "3" is located in the bottom right corner of the slide.

Purpose


- To help each young person to:
 - work steadily and advance to better jobs
 - attend educational or training classes regularly
 - to continue to grow, mature, and acquire adult competencies (SCANS)
 - to support employers'/educators' needs

3

Notes:

1. Point that follow-up tells the case manager and the organization about the impact of the services provided to the younger person.
2. Young people are most vulnerable when they first get unsubsidized employment, this is when the system tends to drop support. Follow-up is critical to this phase of case management.
3. The follow-up phase captures and documents the evidence that the organizational goals have been met and to what degree.
4. Emphasize the importance of gainful employment in a society that has removed all long-term “safety nets” in terms of social supports.

Module Five Slide 4:



Types and Terms

- Two types of follow-up:
 - for reporting and tracking purposes to measure WIA performance goals
 - services and activities after placement

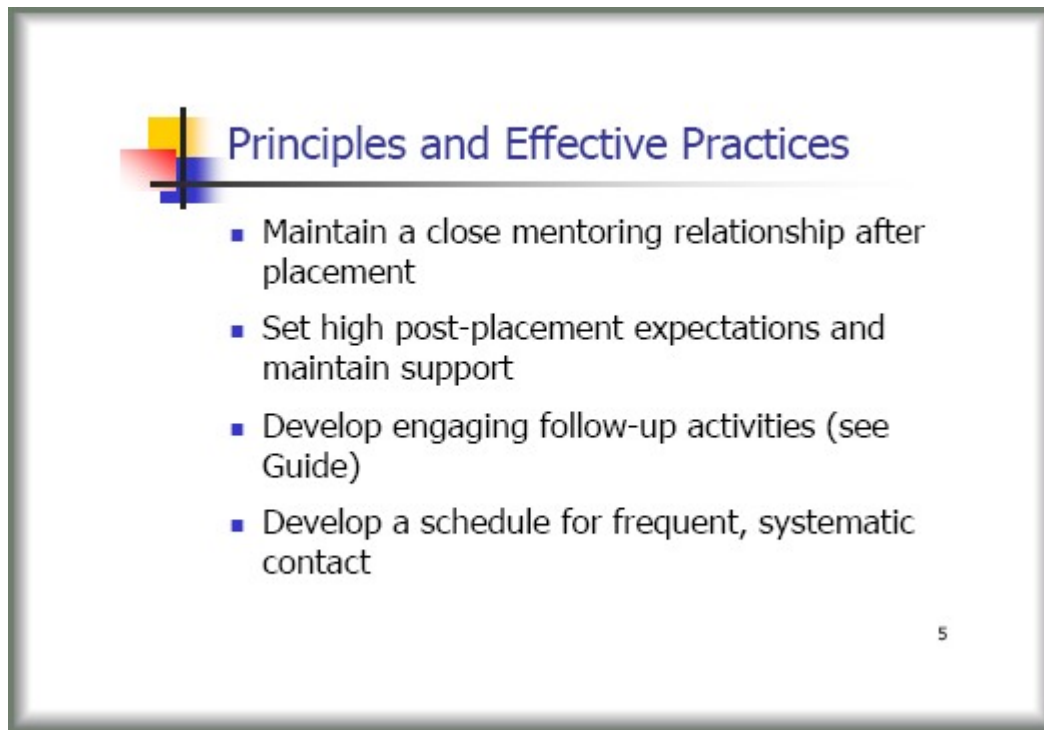
Terms:

- Follow-up Services
- Retention
- Advancement
- Contact

4

Notes:

Module Five Slide 5:



Principles and Effective Practices

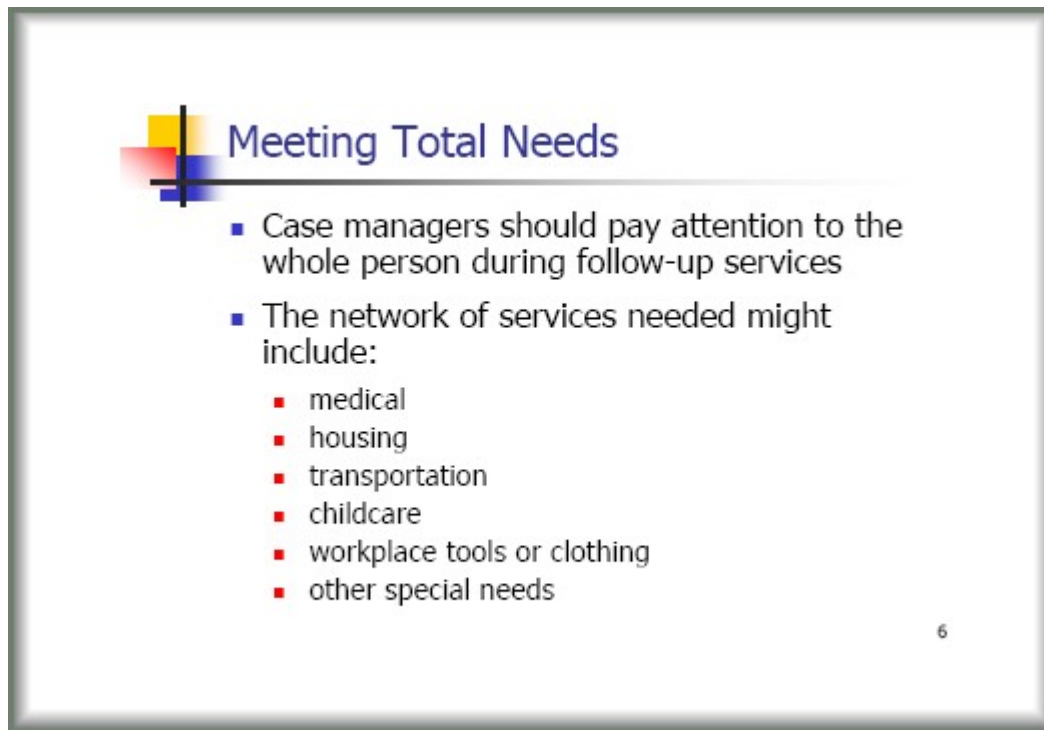
- Maintain a close mentoring relationship after placement
- Set high post-placement expectations and maintain support
- Develop engaging follow-up activities (see Guide)
- Develop a schedule for frequent, systematic contact

5

Notes:

1. Point out that follow-up, like all other case management functions, begins with orientation. By the time a person reaches the follow-up phase he/she should know what is expected of them during this period.
2. If a case manager has used the Low Support/Medium Support/High Support model described in Module Four, low support participants should be ready for peer leadership roles during follow-up.
3. What's in it for the participant? Should be a primary question on the mind of the case manager during the follow-up period. Engaging activities will capture this client-centered focus in a manner that serves everybody.

Module Five Slide 6:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Meeting Total Needs' is positioned to the right of this graphic. Below the title is a horizontal line, followed by a bulleted list of services. A small number '6' is located in the bottom right corner of the slide frame.

Meeting Total Needs

- Case managers should pay attention to the whole person during follow-up services
- The network of services needed might include:
 - medical
 - housing
 - transportation
 - childcare
 - workplace tools or clothing
 - other special needs

6

Notes:

1. Emphasize that there are specific and tangible benefits available for youth during this phase.
2. Case managers need to problem solve with the young person how they will maintain any necessary services currently being provided once they've completed the program.



Module Five Slide 7:

Non-Intrusive Contact with Employers and School Staff

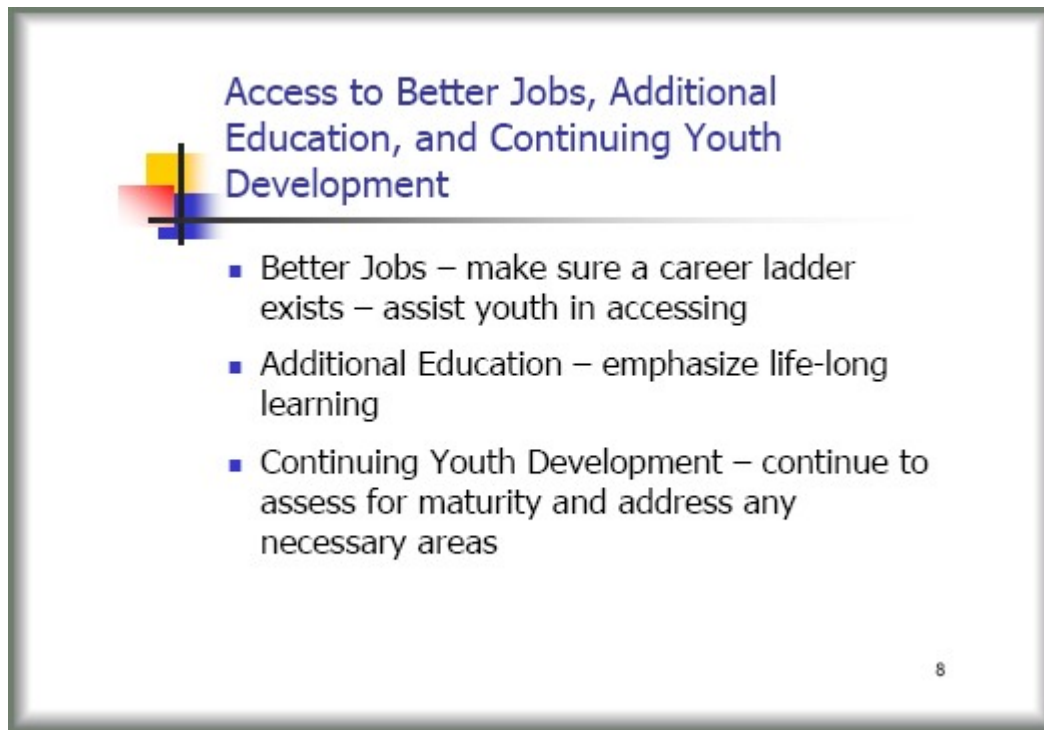
- Follow-up retention services must be incorporated into the rhythm of the youth's work or school day and avoid disruption and exposure as a service recipient

7

Notes:

1. Clearly organizational needs and youth needs must not conflict with each other: the organization's need for information and the youth's need for confidentiality.
2. Peer leadership (using youth as a resource) in this phase is an added protection from exposure.

Module Five Slide 8:



Access to Better Jobs, Additional Education, and Continuing Youth Development

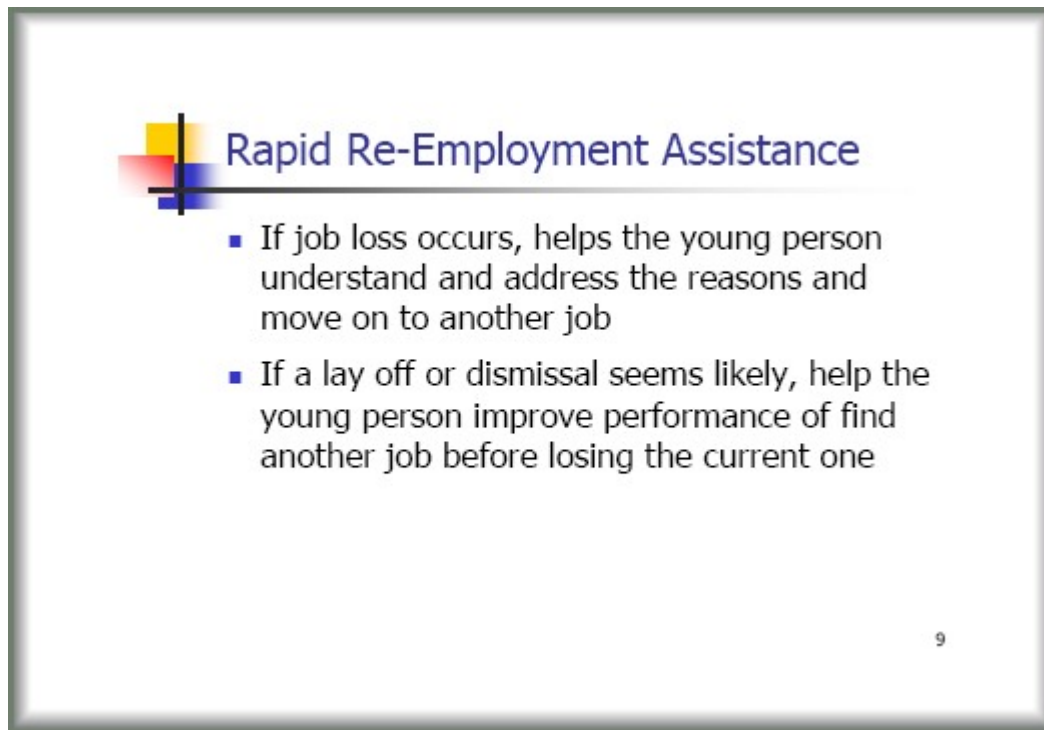
- Better Jobs – make sure a career ladder exists – assist youth in accessing
- Additional Education – emphasize life-long learning
- Continuing Youth Development – continue to assess for maturity and address any necessary areas

8

Notes:

1. Review the points on the slide.
2. Emphasize that this is a period when teaching skills for surviving the current world of work can be re-emphasized or introduced if they have been neglected, e.g.:
 - SCANS should be revisited
 - Understanding career ladders and learning how to access them
 - dealing with performance reviews

Module Five Slide 9:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Rapid Re-Employment Assistance' is positioned to the right of this graphic. Below the title, there are two bullet points. The slide number '9' is located in the bottom right corner.

Rapid Re-Employment Assistance

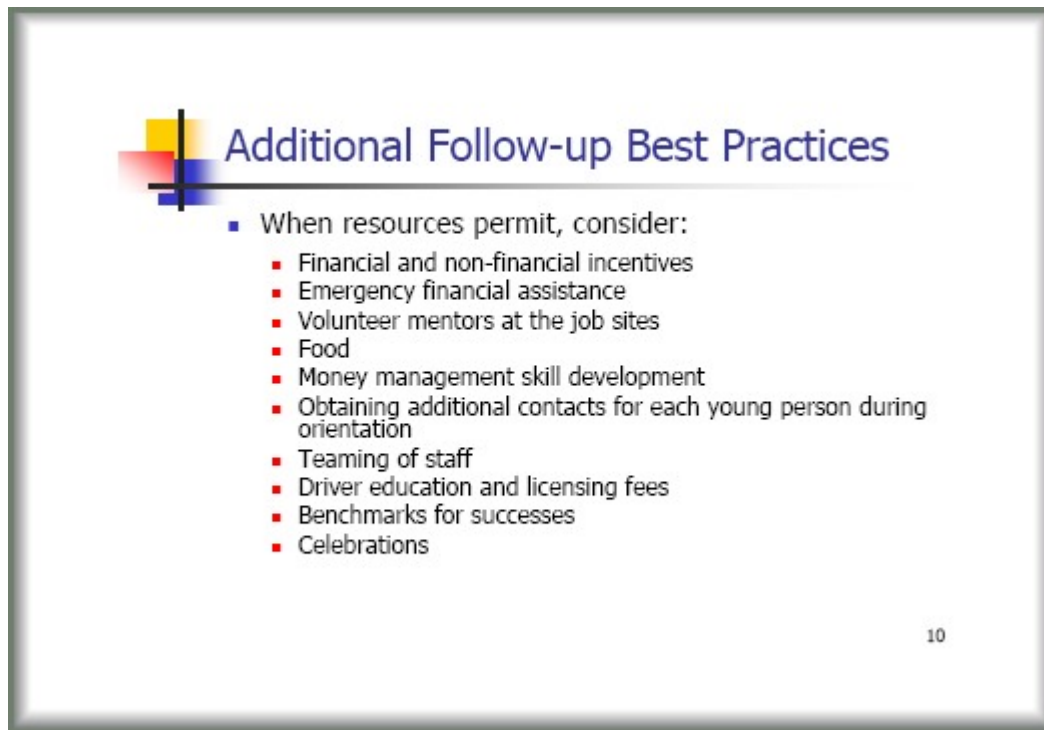
- If job loss occurs, helps the young person understand and address the reasons and move on to another job
- If a lay off or dismissal seems likely, help the young person improve performance of find another job before losing the current one

9

Notes:

1. Review the points on the slide.
2. Point out that it is helpful to stress the One-Stop Centers and all of their resources during these periods, as well as throughout their work life.

Module Five Slide 10:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Additional Follow-up Best Practices' is centered at the top in a blue font. Below the title is a bulleted list of best practices. The number '10' is located in the bottom right corner of the slide frame.

Additional Follow-up Best Practices

- When resources permit, consider:
 - Financial and non-financial incentives
 - Emergency financial assistance
 - Volunteer mentors at the job sites
 - Food
 - Money management skill development
 - Obtaining additional contacts for each young person during orientation
 - Teaming of staff
 - Driver education and licensing fees
 - Benchmarks for successes
 - Celebrations

10

Notes:

Review the list for clarity and to sum up the Module.

TRAINER STOP

CONDUCT MODULE FIVE EXERCISE



TRAINING INSTRUCTIONS: MODULE FIVE

EXERCISE I OVERVIEW



Training Instructions

Conduct Exercise I following the presentation of slides 1-10 – approximate times:

- 10 minutes to prepare for exercise
- 30 minutes to conduct
- 15 minutes for reports
- 10 minutes for group discussion

Exercise Overview

The objectives of this exercise are for trainees to practice/learn:

- Maintaining the connection to youth through active follow-up
- Providing young people with appropriate help in the follow-up phase

Participant Materials

- Module Five Exercise I instructions
- Follow-up questions in Chapter Five of the Manual



TRAINING INSTRUCTIONS: MODULE FIVE

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into small groups. • Give each participant the exercise instructions handouts. • Direct participants group to the note at the beginning of their exercise instructions to place the exercise in context. • Review the instructions and refer them to the Follow-up Questions in the Manual – Chapter 5. • Groups report <p>Following group reports, ask participants:</p> <ul style="list-style-type: none"> • To summarize what points stand out to them from their discussion; and • What they learned or refreshed themselves on from the exercise that they can apply in their work. 	<p>Groups can be as small as two people.</p> <p>You may read this aloud</p> <p>Check with each group to be sure they understand the instructions:</p> <ul style="list-style-type: none"> • Select four questions from the Manual – two from the list of <i>Work-Related Questions</i> and two from the list of <i>Education-related Questions</i>. • Assume a young person’s answers indicate a weakness in work or education readiness and develop appropriate case management solutions to offer. <p>Some sample responses:</p> <p>Employment Questions:</p> <ul style="list-style-type: none"> • <i>What time did you arrive at work?</i> • Talk about benefits of arriving on time <ul style="list-style-type: none"> – Address personal schedule and challenges. Help work through options. – Tools? – a watch? • <i>Are you busy all the time?</i> • Ask questions, e.g. How do you know what you are supposed to do each day, what do you do if you finish early? • Know who assigns activities – what to do next.



	<p>Education Questions:</p> <ul style="list-style-type: none">• <i>What time does class start?</i> (refer to solutions under Employment questions)• <i>Is college or training what you expected?</i>• Talk about need to finish what you start, refer to motivational workshop• Look back – why you chose this• Bring out “My Journey” page
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TRAINING INSTRUCTIONS: MODULE FIVE

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Note: Organizations' funding and staff jobs are dependent on the quality of follow-up, which must continue for 12 months following exit (according to WIA requirements). Case managers are responsible for creating the link between the youth and the accountability systems, which they do by maintaining the connection to the young person through active follow-up.

Module Five Exercise – Follow-Up Questions

In your small group:

Select four questions from the Manual – two from the list of *Work-Related Questions* and two from the list of *Education-Related Questions*

If a young person's answers to these four questions indicate a weakness in work or education readiness, what would be some appropriate case management solutions for you to offer?

Note: Please select a recorder to capture the group's thinking on flipcharts and a reporter for a brief report to the whole group.

Time: 30 minutes for discussion; 5 minutes to report



DOCUMENTATION: RECORD-KEEPING AND CASE NOTES

Training Methodology: PowerPoint, large and small group work;

Time: 2.5 hours +/-

Materials

- Computer/PowerPoint
- PowerPoint handouts, manual
- Module Six Exercise handouts
 - a. Better Case Notes Exercise instructions
 - b. Clarence Case Notes handout
 - c. Kimberly Case Notes handout

PowerPoint Slides

- Slide 1: Module Six: Documentation: Record-keeping and Case Notes
- Slide 2: Module Six: Objectives
- Slide 3: Purpose and Types of Records
- Slide 4: Case Notes
- Slide 5: Case Notes, Continued
- Slide 6: Case Notes, Continued
- Slide 7: Confidentiality
- Slide 8: Confidentiality, Continued
- Slide 9: Complying with USDOL and OMB Standards

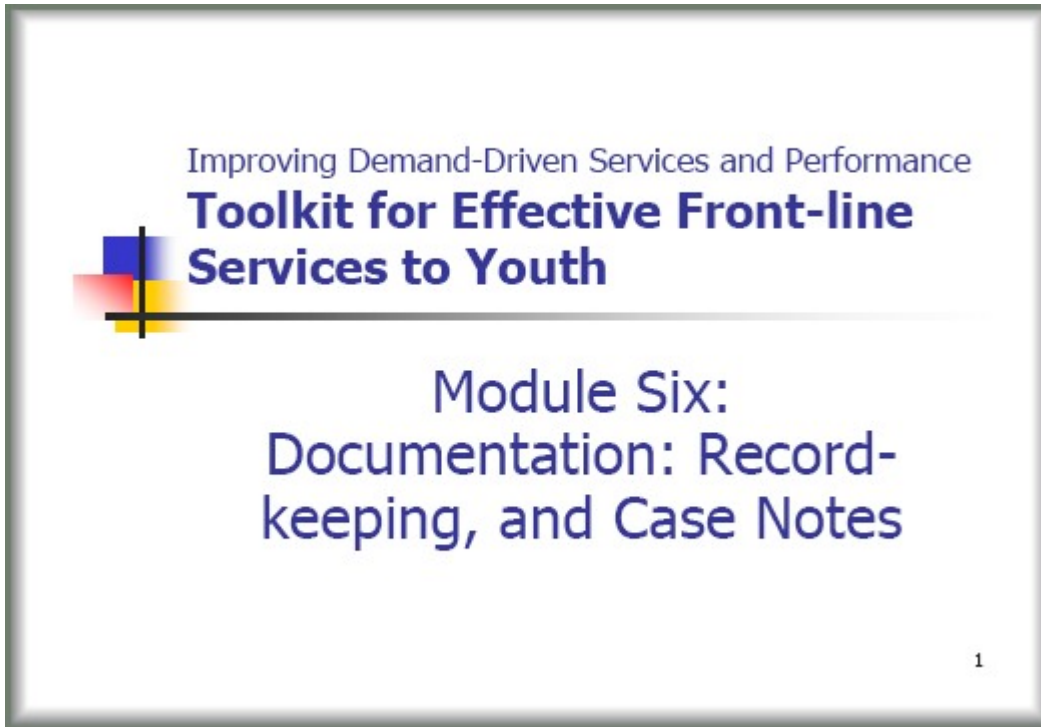
Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of Manual
30 Minutes	<ul style="list-style-type: none"> • Module Six Slide Presentation 	
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise I: Better Case Notes; <ul style="list-style-type: none"> – Form small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions – Review chapter 6 in Manual
20 Minutes	<ul style="list-style-type: none"> • Conduct exercise I 	
15 Minutes	<ul style="list-style-type: none"> • Groups exchange case notes 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 Minutes	<ul style="list-style-type: none"> • Feedback on today • Next Module Session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
Total expected training time: 2.5 hours +/-		



MODULE SIX DOCUMENTATION: RECORD-KEEPING AND CASE NOTES

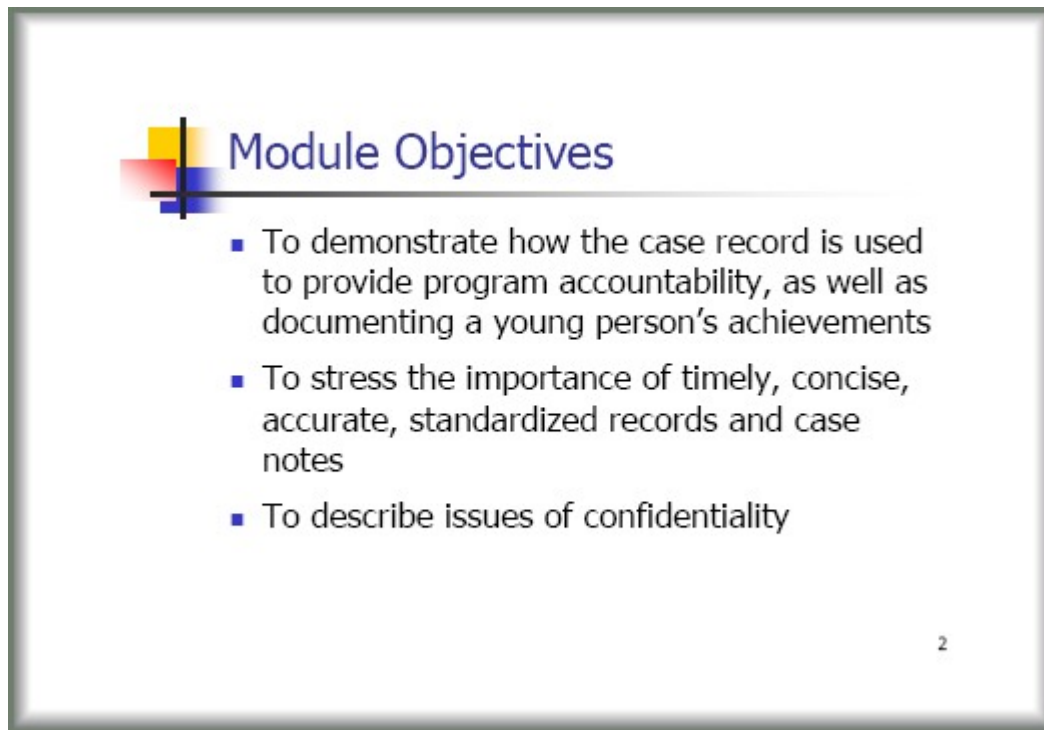
Module Six Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [PowerPoint Slides List](#)
- Trainer see [Suggested Training Outline](#)

Module Six Slide 2:

A presentation slide titled "Module Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide contains three bullet points and a small number "2" in the bottom right corner.

Module Objectives

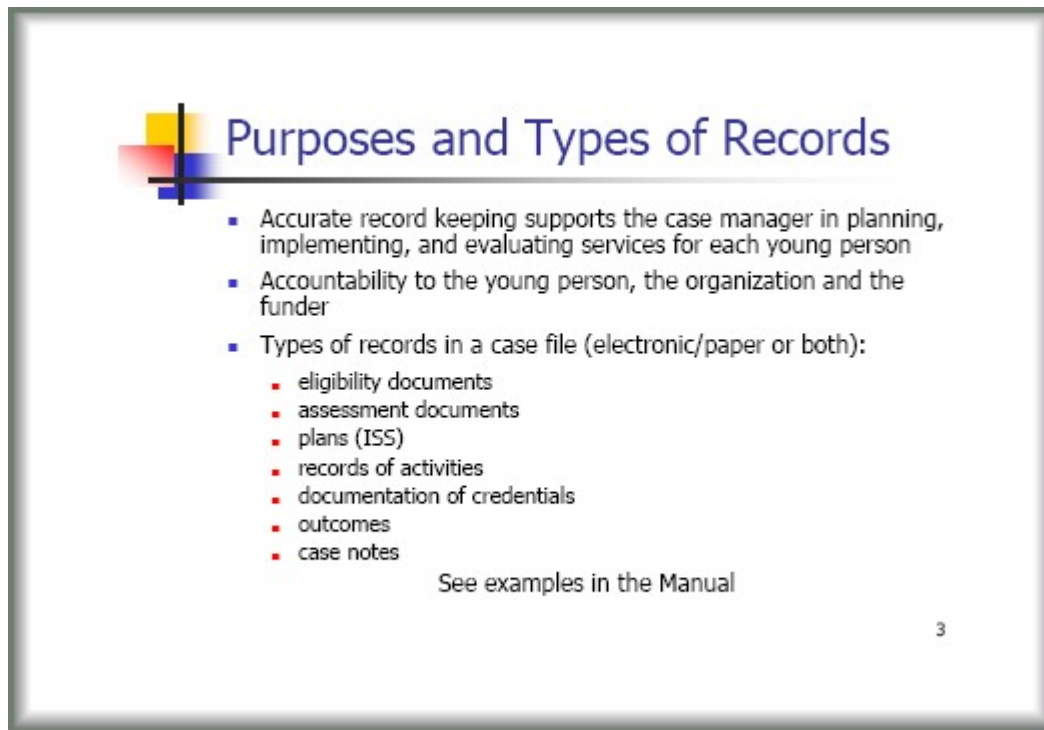
- To demonstrate how the case record is used to provide program accountability, as well as documenting a young person's achievements
- To stress the importance of timely, concise, accurate, standardized records and case notes
- To describe issues of confidentiality

2

Notes:

This two hour module emphasizes the importance of documenting what the case manager and the youth are doing jointly and separately to develop a complete plan to achieve short and long-term objectives. Review Objectives.

Module Six Slide 3:



Purposes and Types of Records

- Accurate record keeping supports the case manager in planning, implementing, and evaluating services for each young person
- Accountability to the young person, the organization and the funder
- Types of records in a case file (electronic/paper or both):
 - eligibility documents
 - assessment documents
 - plans (ISS)
 - records of activities
 - documentation of credentials
 - outcomes
 - case notes

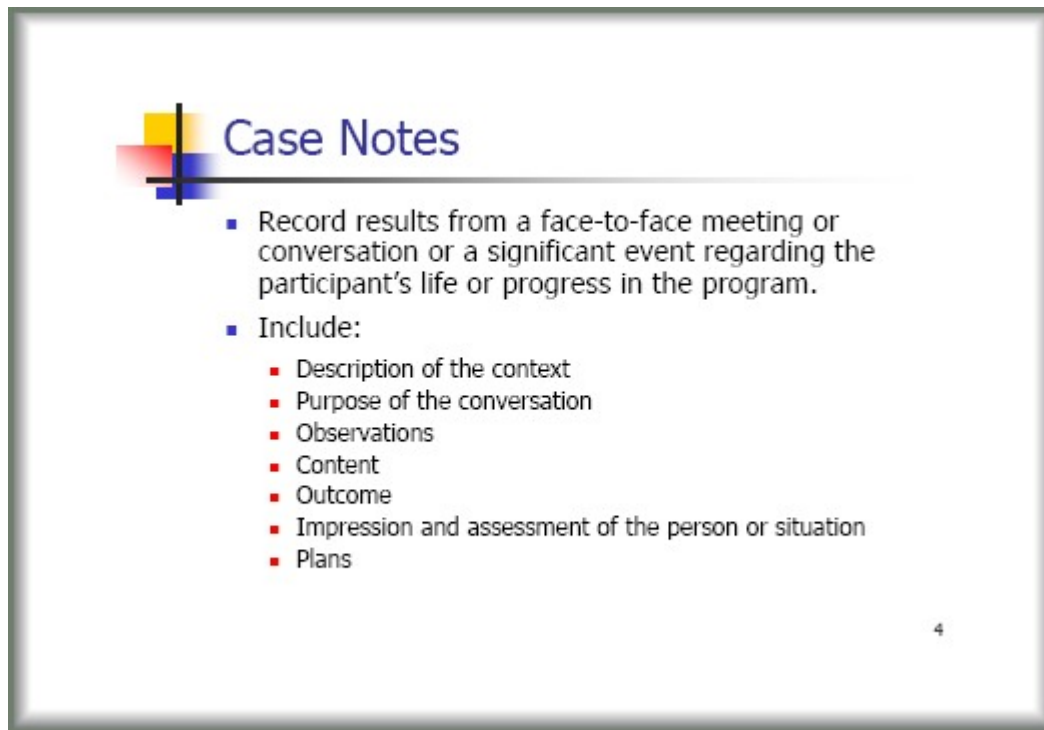
See examples in the Manual

3

Notes:

1. Emphasize that documentation is not only an accountability tool. It is also a service tool.
2. Documentation brings order to the service delivery process by tracking what, where and why of what's been done.
3. Competent case management seeks to assure that the current work can be implemented with or without the current case manager. Accurate and timely documentation makes it possible for others to “pick up the ball”.
4. Review the types of records listed on the slide for clarity.

Module Six Slide 4:



The slide features a decorative graphic on the left consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. The title 'Case Notes' is positioned to the right of this graphic. Below the title is a horizontal line, followed by a bulleted list of requirements. A small number '4' is located in the bottom right corner of the slide frame.

Case Notes

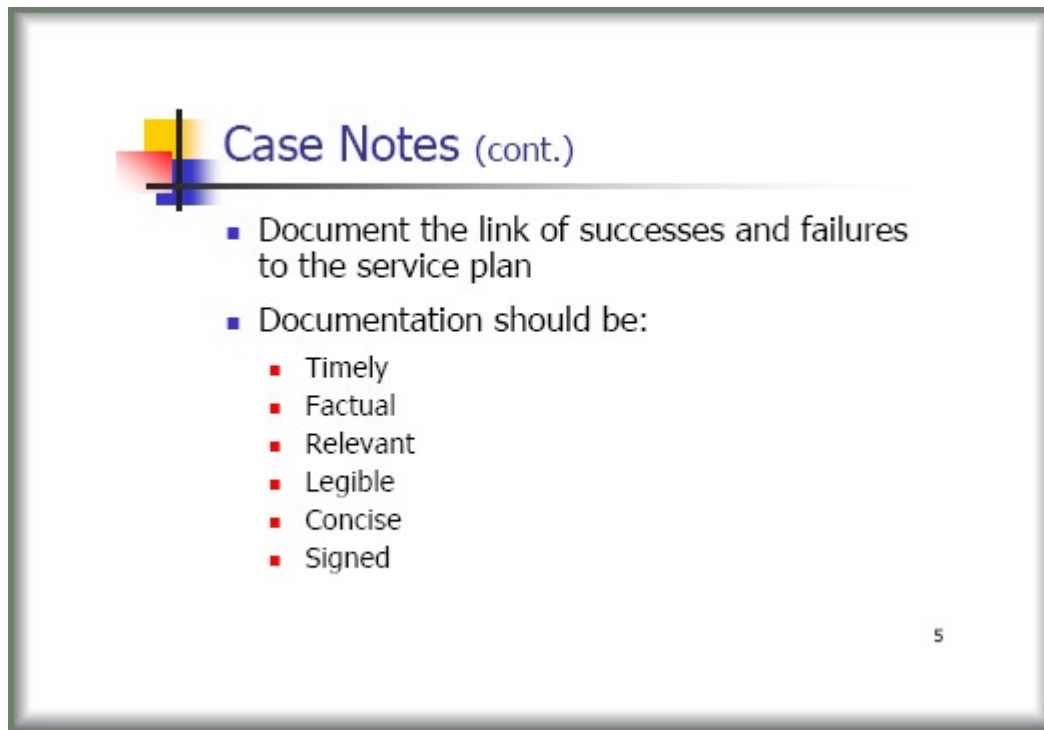
- Record results from a face-to-face meeting or conversation or a significant event regarding the participant's life or progress in the program.
- Include:
 - Description of the context
 - Purpose of the conversation
 - Observations
 - Content
 - Outcome
 - Impression and assessment of the person or situation
 - Plans

4

Notes:

1. Emphasize that case notes should be an accurate synopsis of the case management experience with this particular young person.
2. In writing case notes, keep in mind the potential audience, a new case manager and what he/she would need to know to “pick up the ball.”

Module Six Slide 5:



Case Notes (cont.)

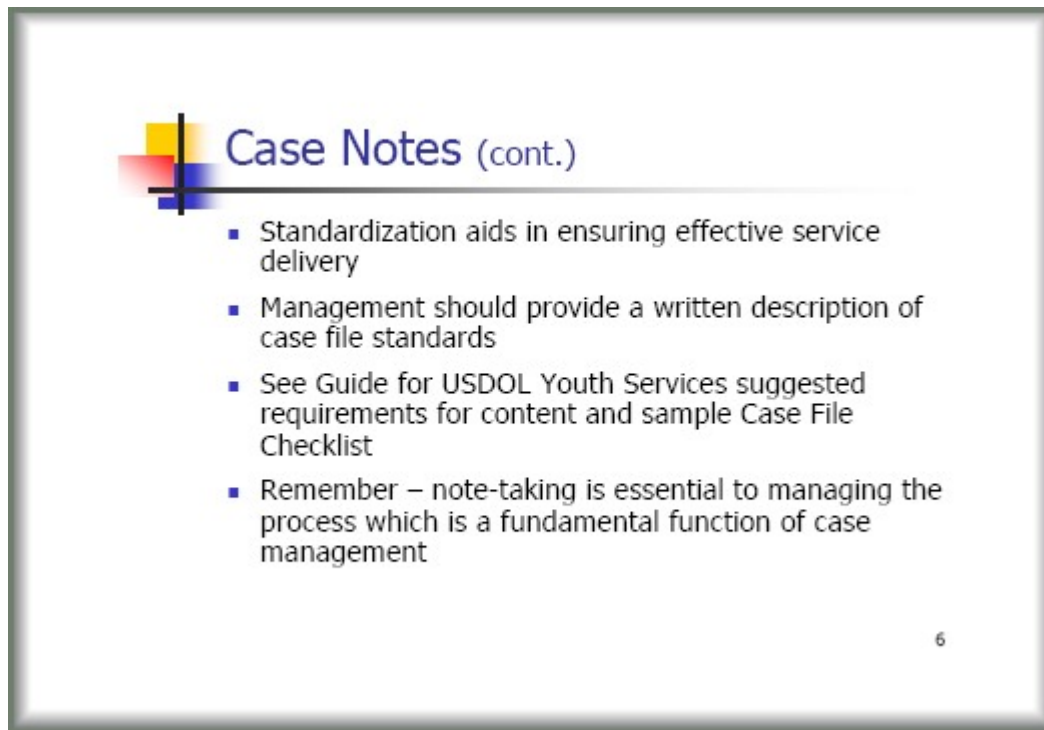
- Document the link of successes and failures to the service plan
- Documentation should be:
 - Timely
 - Factual
 - Relevant
 - Legible
 - Concise
 - Signed

5

Notes:

1. Emphasize that in this kind of work, it is expected that both successful and unsuccessful events will occur throughout the process.
2. To ensure that learning (growth and development) are taking place, the successes and the failures need to connect with the service plan. Case managers shouldn't hesitate to record what's working well and what could be working better.
3. Review the key factors of documentation on the slide.
4. Point out that case managers need to memorize these and check to be sure they're present when conducting their own periodic record reviews.

Module Six Slide 6:



Case Notes (cont.)

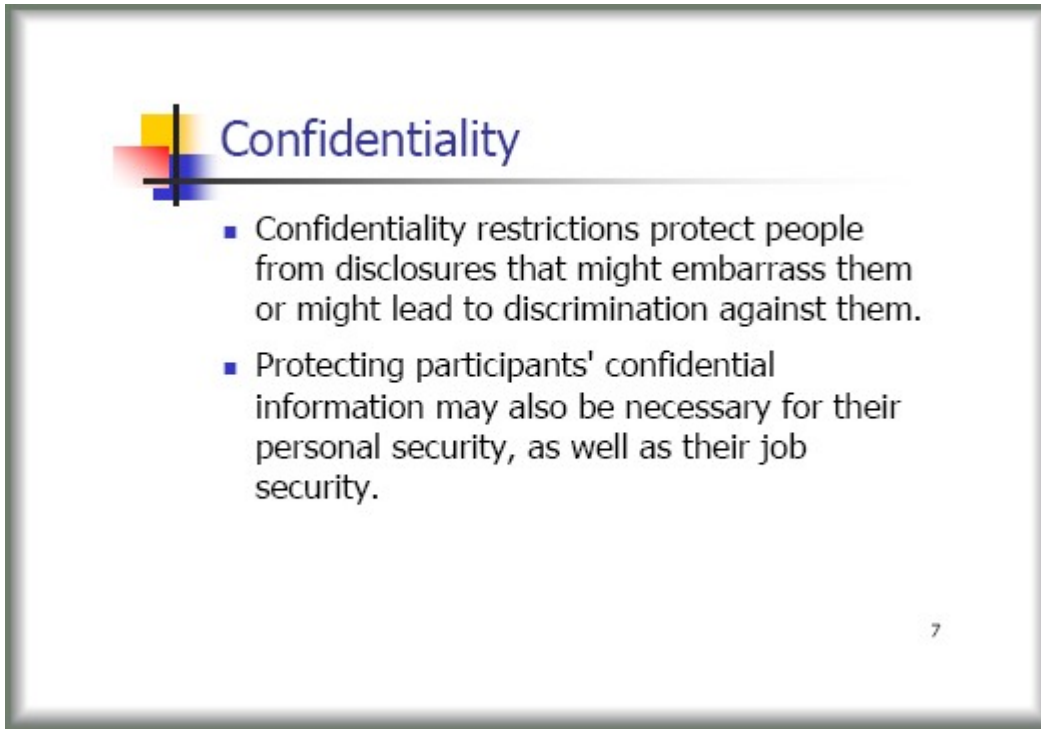
- Standardization aids in ensuring effective service delivery
- Management should provide a written description of case file standards
- See Guide for USDOL Youth Services suggested requirements for content and sample Case File Checklist
- Remember – note-taking is essential to managing the process which is a fundamental function of case management

6

Notes:

1. Discuss ways in which standardization aids effective services delivery:
 - Provides clarity
 - Makes record reviews by multiple readers easier.
2. Point out that forms and standards for record keeping need to be established because consistency across the agency is important for example so people can find things easily and for audits.
3. Point out that note-taking respects the autonomy of the service receivers – each one is treated differently – and protects them from the subjectivity of the case management process.

Module Six Slide 7:

A presentation slide titled "Confidentiality" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide contains two bullet points and a small number "7" in the bottom right corner.

Confidentiality


- Confidentiality restrictions protect people from disclosures that might embarrass them or might lead to discrimination against them.
- Protecting participants' confidential information may also be necessary for their personal security, as well as their job security.

7

Notes:

1. Review the Slide as is.
2. Examples of potential confidentiality concerns:
 - Sexual orientation
 - Family Issues
 - Disability issues
 - Juvenile offenders

Module Six Slide 8:



Confidentiality (cont.)

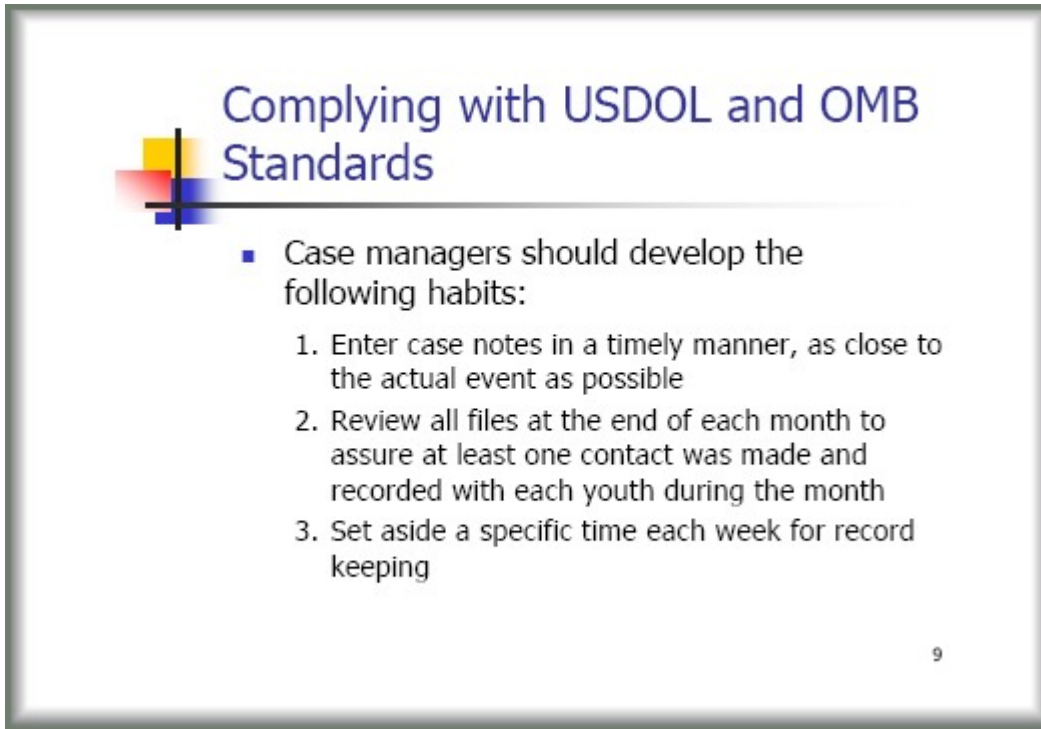
- Young people assured of confidentiality can seek help without fear of disapproval or stigma and can confide with trust, and as a result, benefit more fully from any program.
- When working with children under the age of 18 however, case managers must be cautious not to promise what they cannot guarantee.
- It is the responsibility of case managers to be clearly aware of state laws regarding juveniles and mandatory protective service reporting.
- Programs must, in every case, require that regulations are completely understood and followed by all staff that has access to information.

8

Notes:

1. Review points on the slide.
2. Discuss with the group the problems that can arise when there is not consistency within the organization regarding the rules and regulations on confidentiality, for example: inappropriate disclosure of information can lead to clients' and partners' distrust of individuals and the system.

Module Six Slide 9:



Complying with USDOL and OMB Standards

- Case managers should develop the following habits:
 1. Enter case notes in a timely manner, as close to the actual event as possible
 2. Review all files at the end of each month to assure at least one contact was made and recorded with each youth during the month
 3. Set aside a specific time each week for record keeping

9

Notes:

Review slide as is.

TRAINER STOP

CONDUCT EXERCISE I: BETTER CASE NOTES



TRAINING INSTRUCTIONS: MODULE SIX

EXERCISE I OVERVIEW



Trainer Instructions

“Better Case Notes” Exercise I – Group Work

Following the presentation of slides:

Approximate times:

- 10 minutes to prepare for exercise
- 20 minutes to conduct
- 15 minutes to exchange case notes
- 10 minutes for group discussion

Exercise Overview:

The objectives of this exercise are for trainees to practice/learn:

- Developing and maintaining effective case notes

Participant Materials:

- Exercise instructions
- Handouts for case notes on Kimberly and Clarence
- Manual for examples



TRAINING INSTRUCTIONS: MODULE SIX

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into four small groups. • Give each participant the Exercise Instructions handouts. • Direct participants group to the Note at the beginning of their exercise instructions to place the exercise in context. • Review the instructions and refer them to the case notes examples in chapter Six of the Manual. • When all groups have exchanged notes, ask them to read them to the whole group. <p>Following group reports, ask participants:</p> <ul style="list-style-type: none"> • To summarize what points stand out to them from their discussion. • What they learned or refreshed themselves on from the exercise that they can apply in their work 	<p>Groups can be as small as two people.</p> <p>You may read this aloud.</p> <p>Check with each group to be sure they understand the instructions:</p> <ol style="list-style-type: none"> 1. Groups 1 & 2 review the case notes for Kimberly; identify weak areas and improve them: then exchange/discuss their notes 2. Groups 3 & 4 review the case notes for Clarence; identify weak areas and improve them: then exchange/discuss their notes.



TRAINING INSTRUCTIONS: MODULE SIX

PARTICIPANT HANDOUT #1 OF 4

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Notes: Effective case notes are ones that anyone can read in your absence and follow up on your commitments to your clients. Case notes need to be complete enough (full sentences, names, dates, addresses, and especially outcomes) as if you weren't there to offer further explanation. Poor record keeping makes that impossible.

Groups 1 & 2: Review the case notes for Kimberly:

- What are the weak areas in these notes?
- Develop better notes using the samples in the manual as models
- Write directly on the sample case notes – you will exchange notes with the other group.



TRAINING INSTRUCTIONS: MODULE SIX

PARTICIPANT HANDOUT #2 OF 4

EXERCISE I: BETTER CASE NOTES

Case Notes:

Date: 11/28/06

Comments: Kimberly called to update the worker on her activities. She has been attending GED classes regularly. She says she likes the instructor and is doing well. She also reported that she has completed the job skills/job search course and is looking for employment. She needs documentation for TANF so that she can get child care. She has been looking at day care centers that she can get to easily. We made an appointment for next Friday to make further plans.

Time: 20 minutes for editing case notes
5 minutes to exchange



TRAINING INSTRUCTIONS: MODULE SIX

PARTICIPANT HANDOUT #3 OF 4

EXERCISE I INSTRUCTIONS FOR PARTICIPANTS

Notes: Effective case notes are ones that anyone can read in your absence and follow up on your commitments to your clients. Case notes need to be complete enough (full sentences, names, dates, addresses, and especially outcomes) as if you weren't there to offer further explanation. Poor record keeping makes that impossible.

Groups 3 & 4: Review the case notes for Clarence:

- What are the weak areas in these notes?
- Develop better notes using the samples in the manual as models
- Write directly on the sample case notes – you will exchange notes with the other group.



TRAINING INSTRUCTIONS: MODULE SIX

PARTICIPANT HANDOUT #4 OF 4

EXERCISE I: BETTER CASE NOTES

Case Notes:

Date: 11/28/06

Comments: Clarence came to the agency today and we explored job opportunities. He is interested in almost anything as long as the pay is good. He says that he and his mother are arguing more frequently and he has to find work soon. Clarence is cooperative when talking with the worker but often does not follow through on suggestions. Hopefully, he will keep the promises he made today. We will be meeting again next week.

Time: 20 minutes for editing case notes
5 minutes to exchange



EVALUATION/MEASURING OUTCOMES

Training Methodology: PowerPoint, large and small group work

Time: 2 hours

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- The Manual
- Module Seven Exercise Handout:

PowerPoint Slides:

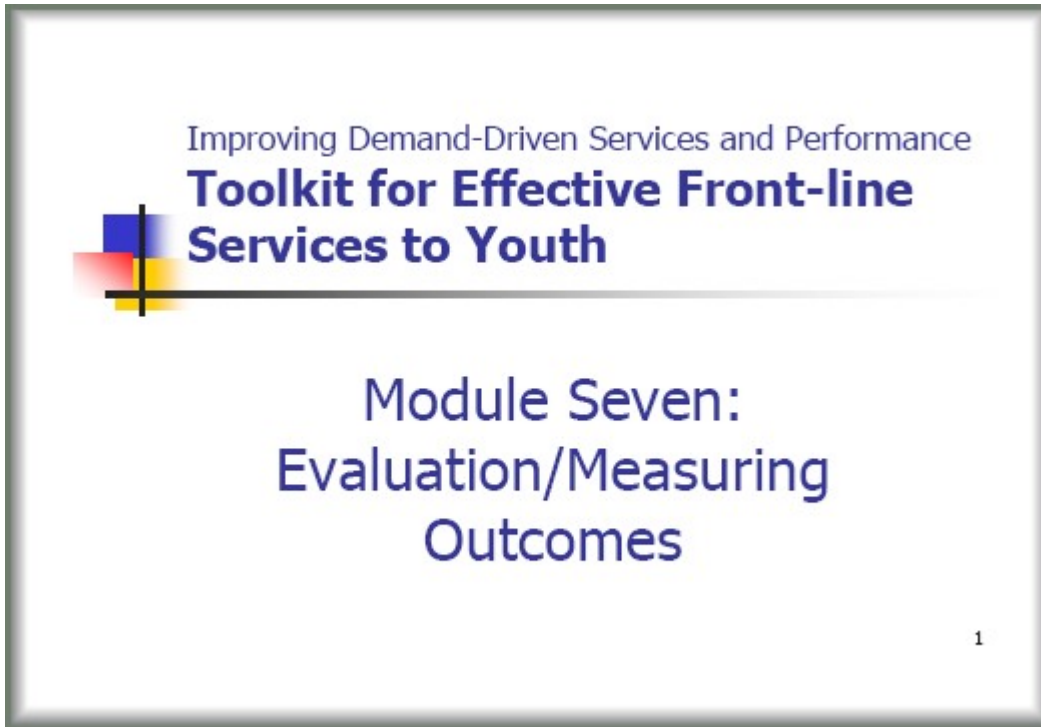
- Slide 1: Evaluation/Outcomes
- Slide 2: Evaluation/Outcomes Objectives
- Slide 3: Purpose of Evaluation
- Slide 4: Purpose of Evaluation, Continued
- Slide 5: Tools

Suggested Training Outline

Time	Activity	Materials Ready
15 Minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
30 minutes	<ul style="list-style-type: none"> • Module Seven, Slide Presentation 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the manual
10 Minutes	<ul style="list-style-type: none"> • Prepare for Exercise I Measuring Results <ul style="list-style-type: none"> – Form small groups – Instruct exercise 	<ul style="list-style-type: none"> – Exercise instructions
40 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Flipcharts & markers – Local performance measurement instruments, if available
20 Minutes	<ul style="list-style-type: none"> • Group reports 	
10 Minutes	<ul style="list-style-type: none"> • Whole group discussion of exercise 	
10 Minutes	(Suggested activities & materials) <ul style="list-style-type: none"> • Close Module Seven <ul style="list-style-type: none"> – Feedback on today – Next module session 	<ul style="list-style-type: none"> – Feedback form – Training schedule
<p>Total expected training time: 2 hours +/-</p>		

MODULE SEVEN EVALUATION/MEASURING OUTCOMES

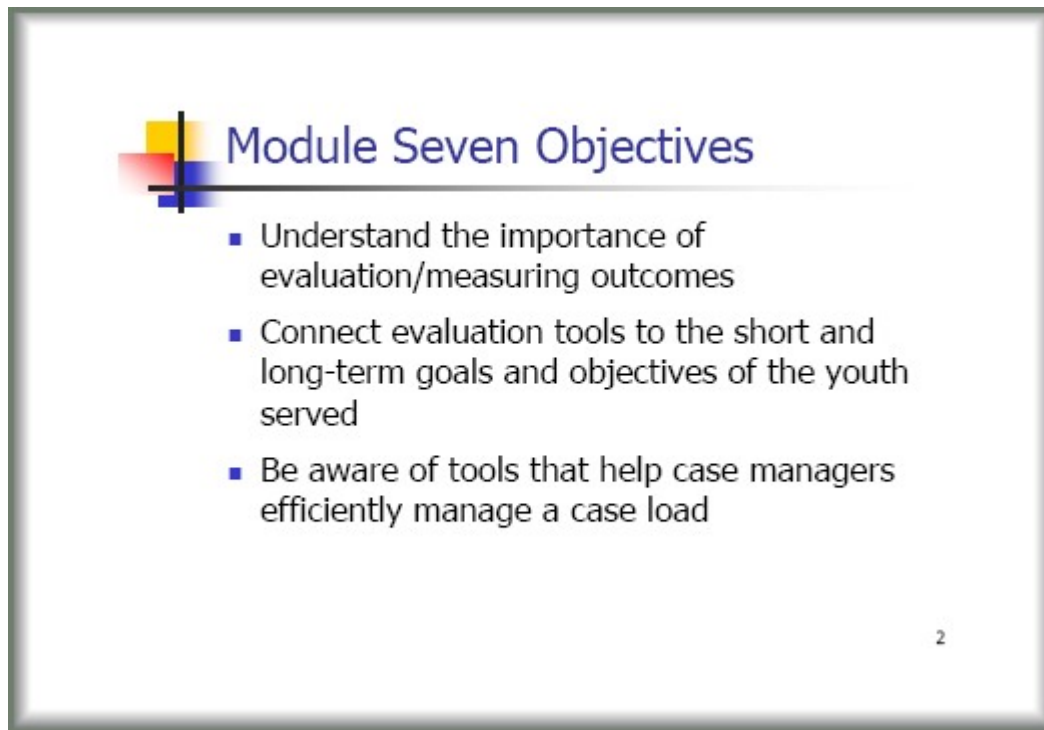
Module Seven Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [PowerPoint Slides List](#)
- Trainer See [Suggested Training Outline](#)

Module Seven Slide 2:

A presentation slide with a white background and a grey border. At the top left is a decorative graphic consisting of overlapping colored squares (yellow, red, blue) and a black crosshair. To the right of this graphic is the title "Module Seven Objectives" in a blue, sans-serif font. Below the title is a horizontal line. Underneath the line is a bulleted list of three items, each starting with a blue square. The items are: "Understand the importance of evaluation/measuring outcomes", "Connect evaluation tools to the short and long-term goals and objectives of the youth served", and "Be aware of tools that help case managers efficiently manage a case load". In the bottom right corner of the slide, the number "2" is displayed.

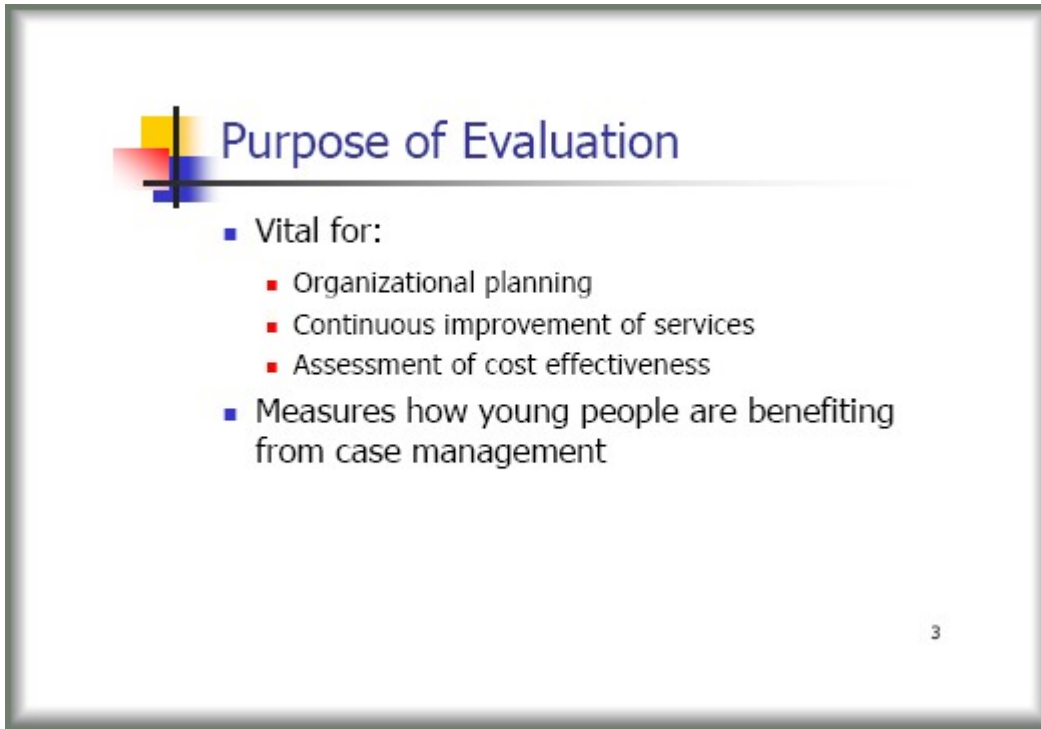
Module Seven Objectives

- Understand the importance of evaluation/measuring outcomes
- Connect evaluation tools to the short and long-term goals and objectives of the youth served
- Be aware of tools that help case managers efficiently manage a case load

2

Notes:

Module Seven Slide 3:



Purpose of Evaluation


- Vital for:
 - Organizational planning
 - Continuous improvement of services
 - Assessment of cost effectiveness
- Measures how young people are benefiting from case management

3

Notes:

1. Emphasize that evaluation complements planning. The two functions should be perceived as a continuous cycle. There's a lot of benefit in it for individual case managers as well as for the organization.
2. Periodic evaluation is essential if you do not want to leave goal achievement to chance.
3. Periodic evaluation protects against reaching plateaus and getting stuck.

Module Seven Slide 4:



Purpose of Evaluation (cont.)

- Evaluation and MIS should relate directly back to the short and long-term goals and objectives set out in each young person's case plan and enable the case manager to measure success
- Identifies areas for institutional change or the need for changes in the case management system

4

Notes:

Module Seven Slide 5:



The slide features a title 'Tools' with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. Below the title is a bulleted list of tools. At the bottom center, it says 'See Examples in Manual' and a small number '5' is in the bottom right corner.

- Monthly/quarterly progress reports
 - Agency reports
 - Individual case manager reports
- Analysis of use of services
 - Quality assurance teams
- Case file review check list
- Customer satisfaction survey results
- Focus Groups

See Examples in Manual

5

Notes:

1. Review the list of tools. Ask which ones are being used and encourage them to include any not being used.
2. Discuss any problems that participants have regarding the tools, for example, lack of familiarity with MIS reports.
3. Encourage the group to suggest solutions for any problems described.

TRAINER STOP

CONDUCT MODULE SEVEN EXERCISE I



TRAINING INSTRUCTIONS: MODULE SEVEN

EXERCISE I OVERVIEW



Training Instruction:

Conduct Exercise I following the presentation of slides 1 – 5 - approximate times:

- 10 minutes to prepare for exercise
- 40 minutes to conduct
- 20 minutes group reports
- 10 minutes for group discussion

Attention trainers: If possible have local performance measurement instruments available for discussion and review.

Exercise Overview:

The objectives of this exercise are for trainees to practice/learn:

- Evaluation as an essential function

Participant Materials:

- Module Seven instructions
- Flip charts and markers
- Local performance measures instruments, if available



TRAINING INSTRUCTIONS: MODULE SEVEN

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into small groups. • Give each participant the Exercise Instructions handouts. • Direct participants group to the Note at the beginning of their exercise instructions to place the exercise in context • Review the instructions • Group reports • Following group reports, ask participants: <ol style="list-style-type: none"> 1. To summarize what points stand out to them from their discussion. 2. What they learned or refreshed themselves on from the exercise that they can apply in their work. 	<p>Groups can be as small as two people.</p> <p>You may read this aloud.</p> <p>Check with each group to be sure they understand the instructions</p> <p>Step 1: Look at local instruments or brainstorm</p> <p>Step 2: Determine current performance goals or provide hypothetical ones</p> <p>Step 3: Calculate formulas to reach goals</p> <p>Step 4: Strategies</p>



TRAINING INSTRUCTIONS: MODULE SEVEN

PARTICIPANT HANDOUT #1 OF 2

EXERCISE INSTRUCTION HANDOUT FOR PARTICIPANTS

Module Seven Exercise I: Evaluation is an essential function at all levels of the service delivery system. All members of high performance work organizations understand that reaching successful outcomes is a concerted team effort in which all members understand their role in conjunction with the overall operation. Front-line workers must understand how outcomes are measured and how to integrate program and support functions with performance expectations in order to assure a win-win outcome.

In your small group:

Step 1: Identify your local performance measure instruments (brainstorm the list if they are not physically available – otherwise look them over to familiarize yourselves if needed.) How do these instruments measure:

- Skill attainment?
- Retention?
- Placement (including job, school, military, skills training)?

Each group should consider itself a staff unit that comprises all of the front-line staff of the organization.

Step 2: Determine the current performance goals of your organization for attainment, retention, and placement. If this information is not available, provide some realistic hypothetical percentages.

Step 3: Based upon the number of staff (the number of trainees in your exercise group) and the performance goals, calculate formulas that would make it possible to successfully reach the goals. More specifically:

- How many youth would need positive outcomes?
- What monthly rates in each category should be established agency-wide to ensure success?
- What should be the specific expectations of each staff member?

Step 4: What strategies can your group come up with to achieve success?



TRAINING INSTRUCTIONS: MODULE SEVEN

PARTICIPANT HANDOUT #2 OF 2

Note: Please select a recorder to capture the group's thinking on flipcharts and a reporter for a brief report to the whole group.

Time: 40 minutes for discussion; 5 minutes to report

ENGAGING EMPLOYERS: MAKING THE CONNECTION

Training Methodology: PowerPoint, large and small group work

Time: 2 hours

Materials:

- Computer with PowerPoint
- PowerPoint handouts
- The Manual
- Module Eight Exercise Handout

PowerPoint Slides:

- Slide 1: Engaging Employers: Making the Connection
- Slide 2: Engaging Employers: Objectives
- Slide 3: Why Employers?
- Slide 4: What Employers Want
- Slide 5: Strategies for Engaging Employers

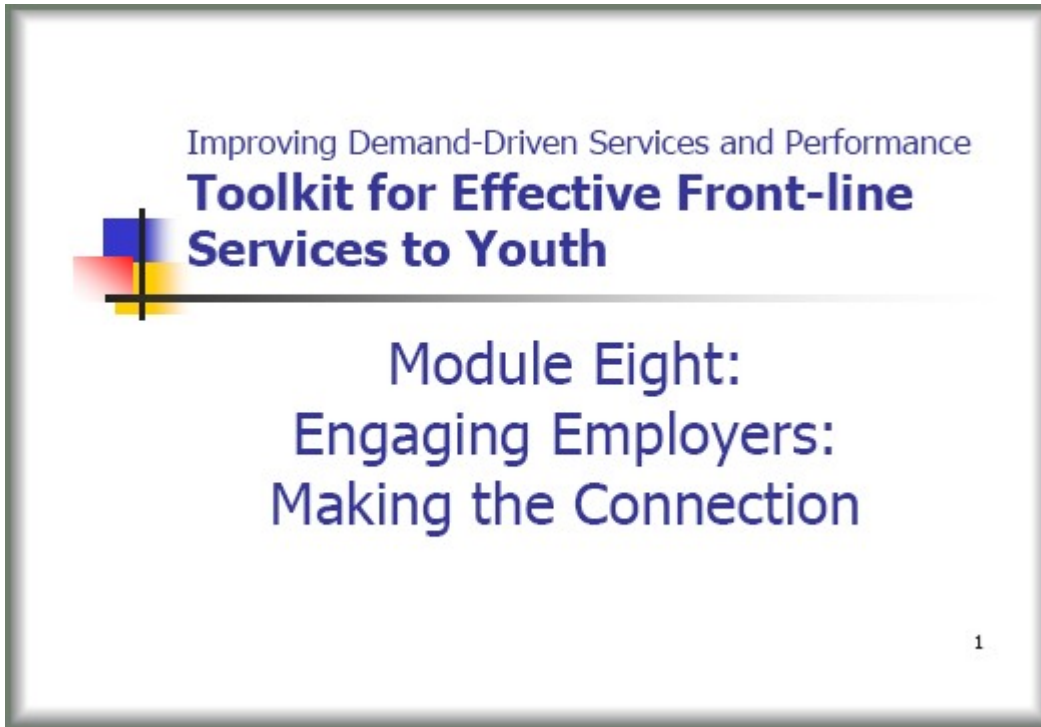
Suggested Training Outline

Time	Activity	Materials Ready
15 minutes	<ul style="list-style-type: none"> • Introduction to the toolkit slide presentation (if required) 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the Manual
30 minutes	<ul style="list-style-type: none"> • Module Eight, Slide Presentation 	<ul style="list-style-type: none"> – Hard copies of slides – Hard copies of the manual
40 minutes	<ul style="list-style-type: none"> • Conduct Exercise I 	<ul style="list-style-type: none"> – Flipcharts & markers – Strategies for Engaging Employers section from the Manual – Additional Employer specific resource materials if desired.
20 Minutes	<ul style="list-style-type: none"> • Group reports and whole group discussion 	
10 Minutes	(Suggested activities & materials) <ul style="list-style-type: none"> • Close Module Eight <ul style="list-style-type: none"> – Feedback on today 	<ul style="list-style-type: none"> – Feedback form
Total expected training time: 2 hours +/-		



MODULE EIGHT ENGAGING EMPLOYERS: MAKING THE CONNECTION

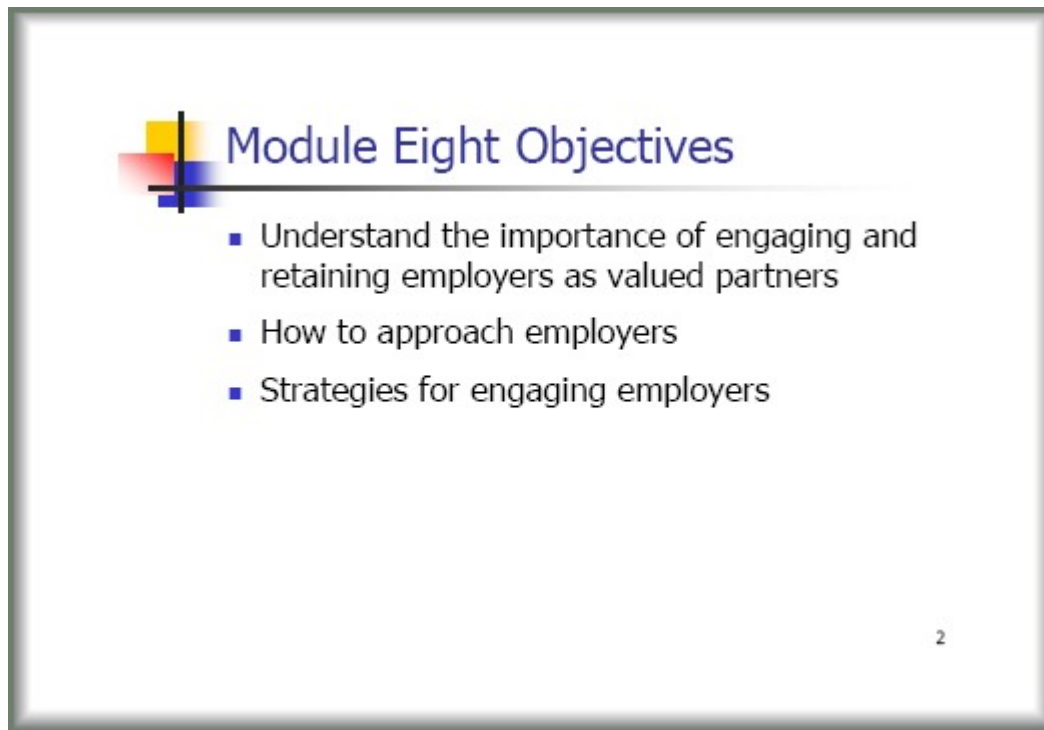
Module Eight Slide 1:



Notes:

- Trainer see [Training Methodology](#)
- Trainer see [PowerPoint Slides List](#)
- Trainer see [Suggested Training Outline](#)

Module Eight Slide 2:

A presentation slide titled "Module Eight Objectives" with a decorative graphic of overlapping colored squares (yellow, red, blue) and a black crosshair. The slide lists three bullet points: "Understand the importance of engaging and retaining employers as valued partners", "How to approach employers", and "Strategies for engaging employers". A small number "2" is in the bottom right corner.

Module Eight Objectives

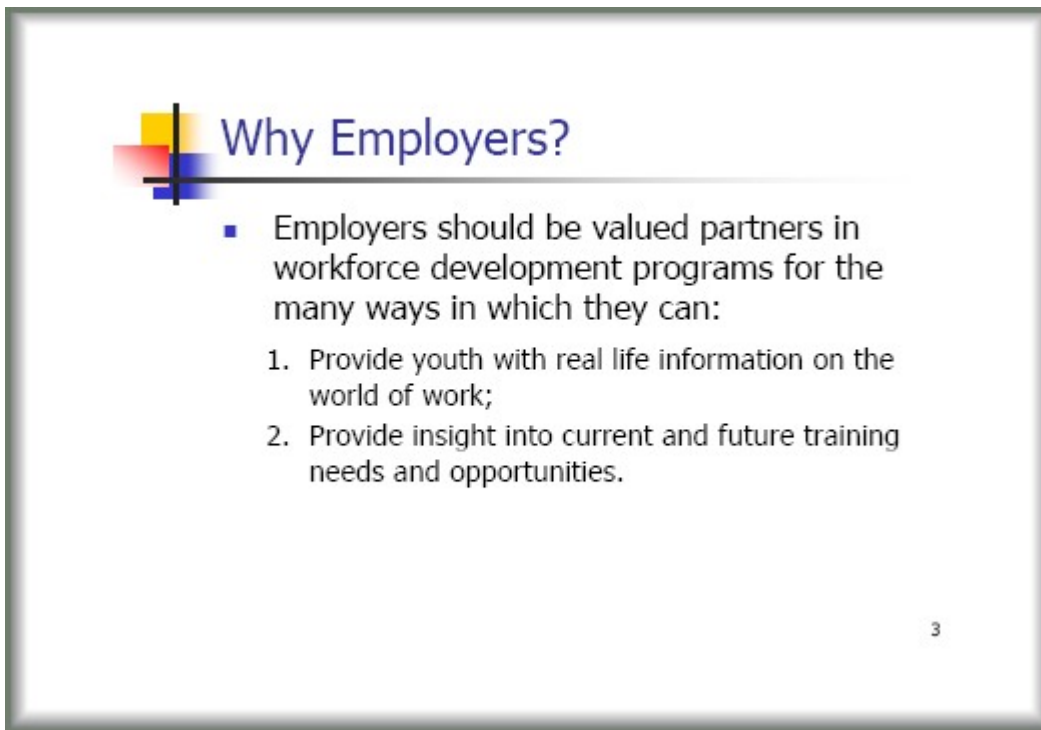
- Understand the importance of engaging and retaining employers as valued partners
- How to approach employers
- Strategies for engaging employers


2

Notes:

1. This two hour module emphasizes the importance of engaging business and industry as valued partners in the 21st century skilled economy.
2. Discuss the role that workforce development staff **MUST** play in exposing youth to major industry, high demand career clusters and industry expectations and role models.
3. Review Objectives on slide.

Module Eight Slide 3:



 **Why Employers?**

- Employers should be valued partners in workforce development programs for the many ways in which they can:
 1. Provide youth with real life information on the world of work;
 2. Provide insight into current and future training needs and opportunities.

3

Notes:

1. Discuss the shift in workforce programs, now viewing the Employer as customer and necessary partner.
2. Discuss benefits that the Employer provides. Review the two points on the slide and ask for other examples from participants.

Module Eight Slide 4:



What Employers Want

- To be heard and understood
- Flexible training programs
- Minimum paperwork
- Benefits from the partnership
- Quality of management of services
- Accountability

4

Notes:

1. Emphasize that Employers want to be included/heard/understood.
2. Employers seek training programs that are flexible and not disruptive to the work product or routine. Avoid administrative overload for Employers.
3. Employers and Workforce System should BOTH benefit from the partnership.

Module Eight Slide 5:



Strategies for Engaging Employers

- Collaboration is a key part of business engagement
- Know your partner and identify their self interests
- Develop a menu of services
- Provide support
- Solicit and listen to employer feedback

5

Notes:

Briefly review the strategies listed on the slide. Ask participants to read this section in Chapter 8 of the Manual, to prepare for the exercise

TRAINER STOP

CONDUCT EXERCISE I: “STRATEGIES APPLIED”



TRAINING INSTRUCTIONS: MODULE EIGHT

EXERCISE OVERVIEW

Training Instruction:

“Strategies Applied” Exercise I –Group Work, discussion

Conduct exercise following the presentation of slides 1 - 5; approximate times:

- 10 minutes to prepare for exercise
- 40 minutes to conduct
- 20 minutes group reports and discussion

Exercise Overview:

The objectives of this exercise are for trainees to practice/learn:

- Engaging local business and industry

Participant Materials:

- Module Eight instructions
- Flip charts and markers
- Employer resources materials if desired



TRAINING INSTRUCTIONS: MODULE EIGHT

EXERCISE I

Training Instructions	Training Notes
<ul style="list-style-type: none"> • Divide participants into two groups. • Give each participant the Exercise Instructions handouts. • Assign each group a particular Employer (one that truly exists in your city, county or local workforce area). (Each group should be assigned an Employer in a different industry if possible). • Review the instructions and refer them to the Strategies for Engaging Employers section of Chapter 8 in the Manual. • Ask each group to discuss in their groups separately before sharing the primary points in an open discussion. <p>Following group reports and discussion, ask participants:</p> <ul style="list-style-type: none"> • To summarize what points stand out to them from their discussion. • What they learned or refreshed themselves on from the exercise that they can apply in their work 	<ul style="list-style-type: none"> • Groups can be as small as two people. • Alternate delivery: You may read the Strategies for Engaging Employers section aloud, and have one open discussion. • Check with each group to be sure they understand the instructions.



TRAINING INSTRUCTIONS: MODULE EIGHT

PARTICIPANT HANDOUT #1

EXERCISE INSTRUCTION HANDOUT FOR PARTICIPANTS

Initially in two groups:

Step 1: Review the Strategies for Engaging Employers section in Chapter 8 of the Manual. Consider this question as you review each concept: “How would this apply to the Employer (assigned to your group)?”

- Know your partner
- Menu of Services
- Support
- Feedback

Step 2: Ask and answer the questions in each section as if developing a partnership with the assigned employer. Discuss opportunities, challenges, etc.

Step 3: Discuss in small groups

Step 4: Share critical points in larger group discussion.

Time: 40 minutes for discussion; 20 minutes for both groups to report out in an open discussion

IMPROVING DEMAND-DRIVEN SERVICES
AND PERFORMANCE:

**TRAINING MODULES FOR
EFFECTIVE FRONT-LINE
SERVICES TO YOUTH**



*These Training Module slides are available in the PowerPoint format for your use.
See separate attachment.*

www.doleta.gov/youth_services

SPRING 2007

Improving Demand-Driven Services and Performance

Toolkit for Effective Front-line Services to Youth



Introduction-Preparing
Youth in a Demand-Driven
Economy



Preparing Youth for Employment in a Demand-Driven Economy:

- ETA's *Strategic Vision for the Delivery of Youth Services* under the Workforce Investment Act is committed to implementing a system that reaches out to the neediest of our youth.
- Organizations providing workforce development services to youth must employ strategies that assist these youth in developing the necessary skills required for success in the workplace.



Preparing Youth for Employment in a Demand-Driven Economy:

- This toolkit will assist Front-line and administrative staff of youth-serving organizations to design and implement an efficient approach to service delivery.
- Successful case management initiatives incorporate a number of fairly standard steps that allow the process to be orderly and structured.



The Manual & the Training Tools

- Prepared by a national team of youth specialists, trainers, and program experts.
- Focused on youth who have become disconnected from mainstream institutions and systems.



The Manual is intended to serve as a resource for:

- Youth Assessment;
- Development of Individual Service Strategies (ISS);
- Integration of services;
- Follow-up services;
- Documentation of services and outcomes.



The Manual (cont.)

- Terms used: case manager or youth advocate, youth development specialists, career advisor.
- Case management system, case load.
- Youth, young person (vs. customer, client, participant).



The Training Tools - Modules

1. *Recruitment, Intake, and Enrollment* – innovative strategies to engage, obtain information from, and enroll youth.
2. *Assessment and Development of an Individual Service Strategy* – discovering the strengths and weaknesses of youth through assessment with examples of proven approaches.



The Training Tools - Modules (cont.)

4. *Meeting the Needs of the Labor Market* – the relevance of including Labor Market information in choosing career pathways and services strategies.
5. *Implementing the Case Plan/ISS* – how to turn the ISS into a living document.



The Training Tools - Modules (cont.)

5. *Follow-Up* – emphasizes importance of providing follow-up services.
6. *Documentation: Record-keeping and Case Notes* – highlights the function of record keeping and practical solutions for ensuring information is captured.



The Training Tools - Modules (cont.)

7. *Evaluation/Measuring Outcomes* – underscores the importance of measuring results.
8. *Engaging Employers: Making the Connection-* linking youth with future jobs.



The Training Tools - Modules (cont.)

- Approximately three hours per module.
- Each topic of the Manual is designed to be a separate training module.
- Most of the modules have exercises for experiential learning.
- Each module is accompanied by a Training Guide and PowerPoint Slides.



Case Management Components

- Recruiting, pre-screening, intake and enrollment;
- Addressing skills, abilities and labor market needs;
- Planning;
- Implementing and monitoring;
- Follow-up;
- Evaluating.

Improving Demand-Driven Services and Performance

Toolkit for Effective Front-line Services to Youth



Module One: Recruitment, Intake and Enrollment



Module One Objectives

- To understand the importance of recruitment and the case manager's role and to identify successful recruitment strategies;
- To review the purposes and steps of intake and enrollment and the case manager's role;
- To demonstrate how to both connect with a young person and gain and document the necessary information for eligibility.



Recruitment: Why Recruitment May Be Needed

- It may be the youth's first contact with a community-based employment program.
- To overcome external, psychological and cultural barriers to youth participation in employment and training programs.

Case managers may be responsible for recruitment and will need to integrate the youth into the whole process, creating a partnership between recruiters, case managers, and job developers.



Recruiting Out-of-School-Youth

- Connecting with youth where they are;
- Canvassing;
- Using a “sector approach”;
- Scheduling;
- Youth serving as recruiters;
- Carrying identification and information;
- Collaborating with partners.

Recruiting In-School-Youth:

Help for at-risk youth to stay in school, improve academically, graduate

- Case Managers can be placed on-site at high schools.
- Talking with school counselors can help identify at-risk youth.
- Recruitment can take place in alternative education programs.



Improving Recruitment

- Review and collect data
 - “How did you hear about the program?”
- What basic info collected from youth?
- Is info necessary for follow-up collected?
- How is info used to plan programs and activities?
- Questions youth and parents most frequently ask?
- How are youth participants involved in outreach and recruitment?



Pre-screening, Intake and Enrollment

Purposes:

- Determine eligibility.
- Collect core information – only what's needed – not more.
- Orient to program and expectations.
- Not just filling in forms.



Stress the following points:

- Youth as active versus passive partners;
- Case manager helps identify and deliver services;
- Young person does the work – attends classes, appointments, other program obligations, maintains regular contact with case manager on a schedule to achieve goals.



Establish Rapport

- May be more than one appointment – each starting with small talk.
- Time for youth to relax – be comfortable.
- Intake is an opportunity to get to know each other - to establish on-going relationship.
- Determine goals, areas of success, barriers to achieving goals.

Improving Demand-Driven Services and Performance

Toolkit for Effective Front-line Services to Youth



Module Two - A: Assessment



Module Two-A Objectives:

- To understand assessment as the foundation of good case management and an extension of the intake process;
- To identify the components of a comprehensive, objective assessment, including methods and tools;
- To review types of support services youth need to overcome employment barriers; and
- To appreciate the need to engage youth in establishing career goals and the assessment process overall.



About Assessment

- The foundation of good case management – without it there's no comprehensive plan.
- It's an on-going process that guides the initial service plan and later updates and revisions.
- Better assessment means better case management.



Principles of Effective Assessment

- Develop assessment strategy.
- Use comprehensive, exploratory approach.
- Make it an on-going process where progress can be measured.
- Use valid and reliable procedures and instruments.
- Administer instruments appropriately – no adverse affects on performance.
- Embed authentic assessments with program activities.



Components of a Comprehensive, Objective Assessment

- Identifies:
 - strengths and assets
 - abilities, aptitudes and interests
 - occupational and employability levels.
- Assess barriers that interfere with participation on a continual basis.
- Provide supportive services.



Use a Variety of Methods and Tools:

- Structured questioning
- Observations
- Self-assessment checklists
- Structured worksheets
- Internet resources
- Formal, standardized tests



Use Assessment Instruments that Measure:

- Literacy and numeracy skills
 - Work readiness and employability skills and characteristics identified for high-performance workplaces
 - Competencies:
 - effectively using resources
 - interpersonal skills
 - information systems
 - technology
 - Foundation skills
 - basic skills
 - thinking skills
 - personal qualities
- * SCANS → → →**
- * Secretary's Commission on Achieving Necessary Skills



Barriers to Employment and Need for Supportive Services

- Assess the need for supportive services, including:
 - transportation
 - childcare
 - dependent care
 - housing
 - linkages to community services
 - assistance with work-attire/work-related tools



Barriers (cont.)

- Assess for appropriate linkages to:
 - medical services
 - mental health assistance
 - alcohol and substance abuse counseling
- Valid driver's license?; need a driver's ed. course and/or test?; need to resolve related court issues?
- If there are issues that can result in arrest – refer to organizations that work with court services.



Establishing Career Goals

- Interest inventories help identify preferences.
 - Arrange for youth to explore occupations that match interests and labor market needs through:
 - O*Net, Career Voyages
 - a state career information delivery system
- And Through job shadowing, work experience, internships.



Informal/Formal Assessment Tools

- **Informal assessments** – less intimidating but more subjective, they include:
 - structured questioning – asked in a friendly, caring way;
 - worksheets/inventories – used individually or with groups;
 - Internet websites – free on-line; review first
 - observations – about work readiness, problems and barriers;

Helpful for information on dreams, goals, strengths, interests, fears, feelings.....



Formal Assessments:

- Professionally developed tests – information on basic education:
 - reading
 - math
 - academic skills
- Life and occupational skills:
 - work readiness
- Interests and aptitudes
- A comprehensive assessment process includes both formal and informal and is on-going.



Engaging Youth in the Assessment Process

- It's a challenge!
- Channel need to discover who they are and identify strengths, skills, talents into self-discovery for career development purposes.
- Emphasize purpose, value and use of information for them and you.
- Avoid saying "test".
- Present results positively – action plan for weaker areas.
- Vary types used – limit to 30-45 minutes.



The Case Manager's Role

- Determine what assessments should be used.
- Select the instrument/s best suited to the youth's needs.
- Prepare the young person for assessment.
- Administer the assessment and score the results or link with an individual or organization who can.
- Interpret the results with the young person.
- Maintain assessment records.

Improving Demand-Driven Services and Performance

Toolkit for Effective Front-line Services to Youth



Module Two – B: Development of an Individual Service Strategy (ISS)



Module Two-B: Objectives

- To understand the importance of a dynamic and mutually developed, implemented and revised Individual Service Strategy (ISS)
- To appreciate the ISS as a means to self-motivate young people – by helping them do things that they can do for themselves
- To review an effective process for developing long-and short term goals and recording on the ISS form



Purpose and Goal

- The Individual Service Strategy (ISS) has three purposes; to mutually develop, implement & revise:
 1. A set of employment, education, and personal development goals
 2. Service objectives and a service plan of action needed to achieve the identified goals and to
 3. Document services provided and results
- The goal of the ISS process is to enable youth to take responsibility for and actively participate in getting from where they are to where they want to be.



Characteristics of an ISS

- Identification information
- Assessment information
- Long-term goals linked to assessment
- Measurable short-term goals (objectives)
- Services/activities to accomplish short-term goals – support services
- Time frames
- Who will provide services, resources
- Tasks and responsibilities of young person
- Tasks and responsibilities of case manager
- Signature of case manager and young person
- Assessment, the ISS and services received should all relate to each other
- A living document, regularly reviewed



Goal Setting

- A Key Component of ISS – involve young person actively from the start– Key Steps:
 1. “Where is this person now?” - assessment results and career exploration drive long and short-term goals
 2. “Where do you want to go?” - work as partners to negotiate mutual agreements
 3. For each long-term goal - a set of sequenced short-term goals – youth achieve regular “wins”

See examples in Manual



Goal Setting (cont.)

4. Time-sequence and prioritize the goals and objectives - an action plan that focuses on “bite-size” pieces
5. Determine who does what – who needs to be involved – case manager’s organization and/or referrals to partners
6. For understanding and ownership - young person re-states goals in own words



Tips – Long and Short-Term Goals

- **Long-term Employment Goals:**
 - Youth do research on job skills, education required, employment outlook, working conditions
 - Explore how a goal can be developed

See suggested questions in the Manual



Tips – Long and Short-Term Goals (cont.)

- **Short-term Employment Goals:**

The series of action steps a youth must take to accomplish a long-term goal

- small
- specific
- achievable

See suggested questions in the Manual



Using an ISS Form

- Information to include:
 - employment
 - education
 - personal development goals
 - short-term goals
 - plans of action
- Should be standardized across case managers



Youth Profiles

Kimberly is 20 years old and has two children: a boy, Kip, 3 and a girl, Kelsey, who is 2. Their father, Kevin, is 26 years old, works as a chef's assistant in a local restaurant and pays child support. Kimberly has hopes that they will marry, and although Kevin assures her that they will, there are no plans in the making.

Kimberly has been receiving TANF assistance along with her child support, however she is required to seek employment. She has never worked. She dropped out of high school in the 10th grade when she became pregnant with Kip. She wants to put the children in a day care program that has opened near her home, however she must be either in school or working to be eligible for child care benefits. She actually liked school when she was attending and at one time had dreams of pursuing a career in accounting. She was taking her second course in accounting in high school when she dropped out.

Kip and Kelsey are very well behaved and a little shy. Until now, they have primarily only interacted with family members. Emphasis has been placed on their social skills (manners) and not on their other developmental and educational needs. Kimberly feels that the day care program will respond to these other needs and also provide an outlet for their ever increasing levels of energy. She tries to be a good mother and often reads articles on child-rearing that she finds in various popular magazines.



Youth Profiles

Clarence is a 19 year old high school graduate who has been unable to find steady gainful employment. He graduated a year ago and had hoped to join the Marines. Unfortunately, he did not perform well on their tests and, in addition a chronic heart problem, believed to be congenital, was discovered during the physical. Although he may need surgery in the future, he is currently receiving medications and routine monitoring. Disappointed, Clarence has not been very aggressive about finding work.

He has had a couple of fast food and part-time jobs, but has not developed much of a work history. His academic record is also not good, although he stuck it out and graduated. He reads on a 7th grade level. Clarence lives with his mother, who is widowed with two younger children. Now that Clarence is no longer eligible for social security, his mother has been warning him that he has to go to work or find another place to live. To date, Clarence has managed to stay away from trouble. He reports that his mother has been arguing with him recently about "hanging out with the wrong people." He resents this because he feels that she does not give him credit for never getting into trouble. He admits, however, that if he had a good full-time job, he would have less time on his hands and it would probably change whom he hangs with.

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Module Three: Meeting the Needs of the Labor Market



Module Three Objectives

- To understand and appreciate the importance of local Labor Market Information to youth and to employers
- To support the role of the case manager in helping youth have a realistic view of career and employment opportunities
- To review sources of Labor Market and Workforce Information
- To review and clarify workplace skills standards
- SCANS



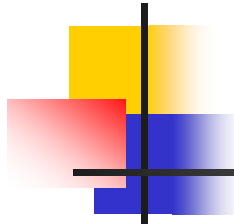
Purpose

- Audiences: youth, employers and community
- Youth - who employs whom, where and for what wages
- Employers - tracks local and national industry trends; availability and quality of workers; investments in training resources
- Community – monitor workforce needs; attract new businesses, etc.



Roles and Responsibilities of Case Managers

- Provide youth with realistic view of opportunities in the community; identify career paths; gain understanding of cost of living; compare local salaries
- Assists youth to explore “career pathways” and types of training involved; provides regional and future information
- Establishes and maintains good relations with employers and workforce board and/or economic development councils



TIPS

- State and local data most useful: employer needs, training and skill sets needed; occupational outlook
- Economic information is not perfect – sometimes data is old – information can change quickly
- See practical strategies in the Manual for using economic and workforce information



ETA Sources of Labor Market and Workforce Information

- America's Labor Market Information System (ALMIS)*
- America's CareerInfoNet (ACINET)*
- CareerInfoNet*
- CareerOneStop portal*
 - America's Job Bank (AJB)
 - America's Service Locator (ASL)
 - O*NET OnLine
 - Workforce Tools of the Trade
- Career Voyages

*See descriptions in Manual



SCANS* (Workplace Skills Standards) Review and Clarification

*Secretary's Commission on Achieving Necessary Skills

Skills and characteristics that employers have identified as essential for success in the workplace

- 3 Foundation Skills:

- basic skills
- thinking skills
- personal qualities

- 5 Competencies:

- resources
- interpersonal skills
- information
- systems
- technology



Foundation Skills*

* Blueprint for Workplace Success Skill Standards: Skills Youth Workers Need to Succeed in the 21st Century Workplace

- Basic Skills (academic)
 - Reading
 - Writing
 - Listening
 - Speaking
 - Arithmetic and Mathematics



Foundation Skills (cont.)

- Thinking Skills
 - Decision Making
 - Reason and Problem Solving
 - Knowing How To Learn
 - Creative Thinking
 - Seeing Things in the Mind's Eye



Foundation Skills (cont.)

- Personal Qualities
 - Self Management
 - Responsibility
 - Integrity/Honesty
 - Self-Esteem
 - Sociability



The Five Work Place Competencies:

Resources, Information, Interpersonal Skills,
Systems & Technology

- Resources:
 - Allocates time
 - Money
 - Material and facility resources
 - Human resources



The Five Work Place Competencies (cont.)

- Information:
 - Acquires and evaluates information
 - Organizes and maintains information
 - Interprets and communicates information
 - Uses computers to process information



The Five Work Place Competencies (cont.)

- Interpersonal:
 - Participates as a team member
 - Teaches others
 - Serves clients and customers
 - Exercises leadership
 - Negotiates to arrive at a decision
 - Works with cultural diversity



The Five Work Place Competencies (cont.)

- Systems
 - Understands systems
 - Monitors and corrects performance
 - Improves and designs systems



The Five Work Place Competencies (cont.)

- Technology
 - Selects technology
 - Applies technology to tasks
 - Maintains and troubleshoots technology

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Module Four:
Implementing the Case
Plan/Individual Service Strategy
(ISS) and Monitoring Outcomes



Module Four Objectives

- To understand the role of case manager as a central point of contact among the players
- To appreciate the importance of matching the level of support to the skills and readiness of the young person
- To identify the services available in the community and to match them with the young person
- To know how to adapt their case management style to the developmental needs of the young person
- To focus on a management approach to monitoring the case load



Purpose

Brokering and linking builds connections
Between a young person and organizations, and among
organizations

- Facilitating Communication - case manager as central point of contact:
 - players know their roles
 - give background information
 - stay on top of ISS changes
 - encourage youth self-monitoring



Identifying Appropriate Services

- Case manager as broker, advocate for youth, ensures s/he receives needed services
- Case manager's organization should identify community services meeting criteria, e.g. accessibility and effectiveness
- Case manager knows services that are available
- Case manager's role in identifying services is vital



Convening the Players

- Case manager is a bridge between program – school system – courts – other community service agencies
- Consults with individuals involved in young person's ISS, including young person and his/her family
- Uses a “case conference” approach, as appropriate
- Uses large and small groups to foster the benefits of a mutual aid approach



Connecting the Youth with Services

- Case Managers matches support to skills and readiness of young person – how much can s/he do for her/himself, e.g.:
 - *High support* - make all the arrangements - go with them
 - *Middle support* – prepare young person to make calls from case manager's office
 - *Low support* – give name and number – young person calls on own



Preparing the Young Person

- Minimize referral-related anxiety for "*high and middle support*" youth
- Share your assessment - discuss the reason the service is being sought
- Describe what will probably happen and review:
 - questions that might be asked during appointment
 - identification or other materials that might be required
 - outcomes that might be expected from appointment



Pre-Appointment Reminders

- ***High support*** - Contact young person the day before appointment to remind and address last minute misgivings
- ***Middle support*** – case manager should use judgment regarding pre-appointment calls; objective is to help youth to succeed as opposed to fail
- Ask youth to call immediately after the appointment to share how it went



Following-up After the Appointment

- Contact young person if he/she fails to contact you
- Contact organization to:
 - Confirm appointment was kept or re-schedule if not kept
 - Identify what happened from their perspective
- Determine next steps



Monitoring Services

- Monitor service delivery to:
 - assure that needed services are being provided
 - verify that the service plan is being properly carried out, results are being achieved - revise ISS as needed
 - assist with problems
 - maintain the youth/case manager partnership, and
 - provide encouragement and nurture motivation



Monitoring Services (cont.)

- Monitoring also should focus on service providers and young person – three questions to ask:
 1. Are the services called for in the ISS being delivered?
 2. Are these services having the desired results?
 3. Do the plan and the services seem to be sufficient?
- Answers may require a modification of the ISS



Motivating and Encouraging

- Case manager's role should focus on nurturing motivation to change and achieve goals:
 1. Identify the motivators youth bring with them
 2. Avoid focusing on what *you* wish motivated the young person
 3. Identify the costs of change – what is keeping the young person with the status quo?



Motivating and Encouraging (cont.)

4. Show youth how the things that motivate *them* can be achieved through a specific program
5. Prepare and help youth cope with the costs of change
6. Use external motivators (recognition system) to stimulate and strengthen internal motivators
7. Structure success experiences
8. Praise success, even small ones



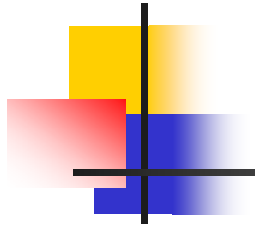
Motivating and Encouraging (cont.)

9. Approach both successes and failures as positive learning experiences – study them for their lessons
10. Use tangible incentives to reward success
11. Constantly reinforce motivators that brought them there in the first place
12. Provide a support network – including small groups



Recognition System

- To spur achievement, a recognition system must be:
 - Measurable
 - Specific
 - Built around a desirable prize
 - Consistent
 - Frequent



Possible Milestones

- Perfect attendance
- Demonstrating improvement
- Positive attitude
- Obtaining GED
- Completing training
- Acceptance into a college, training program, etc.
- Gaining employment

Tangible Recognition

- Certificate
- Personal note/card
- Letter of reference to employer
- Photo etc. on a "Wall of Fame" bulletin board
- Cash/Gift Certificates
- Points to redeem for merchandise
- Travel
- Student of the week/month
- Leadership opportunities
- Participating in graduation ceremony



Special Challenges

- Making a Demand for Change and Growth
- Balancing Firmness with Empathy
- Anger Management



Time Management Tips

- Unmanageable case loads mean efficiencies are needed
- Use “triage” to identify high-risk youth who need high support, use:
 - assessment results
 - case notes
 - participant interviews

Low Support – Medium Support – High Support

LS

MS

HS



Situational Leadership Model

- A useful model for case managers when they are trying to determine what level of support and what behaviors will best work with youth – LS, MS or HS
- A balance between the amount of guidance/direction and support/encouragement you provide based on the readiness he/she demonstrates in meeting objectives
- Oriented toward increasing readiness so that when he/she succeeds, the case manager reduces the amount of guidance direction



Direct/coach youth needing high support

They, for example:

- Have no or low commitment to career goal
- Skills are extremely low
- Major personal problems
- Friends/family discouraging
- Unstable/unreliable – housing; child care; transportation

You, for example:

- Define roles
- Provide specific instructions – what, how, when, and where
- Closely supervise
- Engage in two-way communication; provide opportunities for input
- Lead with your own ideas



Encourage youth needing medium support

They, for example:

- Show interest in career goal
- Will struggle to learn skills but achievable
- Has personal problems but getting help
- Friends/family not discouraging
- Stable/reliable housing; child care; transportation

You, for example:

- Provide recognition
- Listen and facilitate
- Ask for suggestions or input
- Discuss problems but encourage them to identify solutions
- Lower emphasis on direction – higher on supporting and encouraging



Encourage and delegate to youth needing low support

They, for example:

- Have strong, clear career goal
- Can realistically learn the skills
- Personal life under control
- Support from family/ friends
- Stable/reliable housing; child care; transportation

You, for example:

- Support his/her decision making and problem solving
- Provide recognition
- Listen and facilitate
- Encourage independent actions
- Provide minimal direction

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Module Five: Follow-Up



Module Five Objectives

- To help case managers understand the role of follow-up as part of the case management continuum
- To recognize follow-up as critical to meeting WIA performance goals
- To provide effective practices through practical follow-up activities



Purpose

- To help each young person to:
 - work steadily and advance to better jobs
 - attend educational or training classes regularly
 - to continue to grow, mature, and acquire adult competencies (SCANS)
 - to support employers'/educators' needs



Types and Terms

- Two types of follow-up:
 - for reporting and tracking purposes to measure WIA performance goals
 - services and activities after placement

Terms:

- Follow-up Services
- Retention
- Advancement
- Contact



Principles and Effective Practices

- Maintain a close mentoring relationship after placement
- Set high post-placement expectations and maintain support
- Develop engaging follow-up activities (see Guide)
- Develop a schedule for frequent, systematic contact



Meeting Total Needs

- Case managers should pay attention to the whole person during follow-up services
- The network of services needed might include:
 - medical
 - housing
 - transportation
 - childcare
 - workplace tools or clothing
 - other special needs



Non-Intrusive Contact with Employers and School Staff

- Follow-up retention services must be incorporated into the rhythm of the youth's work or school day and avoid disruption and exposure as a service recipient



Access to Better Jobs, Additional Education, and Continuing Youth Development

- Better Jobs – make sure a career ladder exists – assist youth in accessing
- Additional Education – emphasize life-long learning
- Continuing Youth Development – continue to assess for maturity and address any necessary areas



Rapid Re-Employment Assistance

- If job loss occurs, helps the young person understand and address the reasons and move on to another job
- If a lay off or dismissal seems likely, help the young person improve performance or find another job before losing the current one



Additional Follow-up Best Practices

- When resources permit, consider:
 - Financial and non-financial incentives
 - Emergency financial assistance
 - Volunteer mentors at the job sites
 - Food
 - Money management skill development
 - Obtaining additional contacts for each young person during orientation
 - Teaming of staff
 - Driver education and licensing fees
 - Benchmarks for successes
 - Celebrations

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Module Six: Documentation: Record- keeping, and Case Notes



Module Objectives

- To demonstrate how the case record is used to provide program accountability, as well as documenting a young person's achievements
- To stress the importance of timely, concise, accurate, standardized records and case notes
- To describe issues of confidentiality



Purposes and Types of Records

- Accurate record keeping supports the case manager in planning, implementing, and evaluating services for each young person
- Accountability to the young person, the organization and the funder
- Types of records in a case file (electronic/paper or both):
 - eligibility documents
 - assessment documents
 - plans (ISS)
 - records of activities
 - documentation of credentials
 - outcomes
 - case notes

See examples in the Manual



Case Notes

- Record results from a face-to-face meeting or conversation or a significant event regarding the participant's life or progress in the program.
- Include:
 - Description of the context
 - Purpose of the conversation
 - Observations
 - Content
 - Outcome
 - Impression and assessment of the person or situation
 - Plans



Case Notes (cont.)

- Document the link of successes and failures to the service plan
- Documentation should be:
 - Timely
 - Factual
 - Relevant
 - Legible
 - Concise
 - Signed



Case Notes (cont.)

- Standardization aids in ensuring effective service delivery
- Management should provide a written description of case file standards
- See Guide for USDOL Youth Services suggested requirements for content and sample Case File Checklist
- Remember – note-taking is essential to managing the process which is a fundamental function of case management



Confidentiality

- Confidentiality restrictions protect people from disclosures that might embarrass them or might lead to discrimination against them.
- Protecting participants' confidential information may also be necessary for their personal security, as well as their job security.



Confidentiality (cont.)

- Young people assured of confidentiality can seek help without fear of disapproval or stigma and can confide with trust, and as a result, benefit more fully from any program.
- When working with children under the age of 18 however, case managers must be cautious not to promise what they cannot guarantee.
- It is the responsibility of case managers to be clearly aware of state laws regarding juveniles and mandatory protective service reporting.
- Programs must, in every case, require that regulations are completely understood and followed by all staff that has access to information.



Complying with USDOL and OMB Standards

- Case managers should develop the following habits:
 1. Enter case notes in a timely manner, as close to the actual event as possible
 2. Review all files at the end of each month to assure at least one contact was made and recorded with each youth during the month
 3. Set aside a specific time each week for record keeping

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Module Seven: Evaluation/Measuring Outcomes



Module Seven Objectives

- Understand the importance of evaluation/measuring outcomes
- Connect evaluation tools to the short and long-term goals and objectives of the youth served
- Be aware of tools that help case managers efficiently manage a case load



Purpose of Evaluation

- Vital for:
 - Organizational planning
 - Continuous improvement of services
 - Assessment of cost effectiveness
- Measures how young people are benefiting from case management



Purpose of Evaluation (cont.)

- Evaluation and MIS should relate directly back to the short and long-term goals and objectives set out in each young person's case plan and enable the case manager to measure success
- Identifies areas for institutional change or the need for changes in the case management system



Tools

- Monthly/quarterly progress reports
 - Agency reports
 - Individual case manager reports
- Analysis of use of services
 - Quality assurance teams
- Case file review check list
- Customer satisfaction survey results
- Focus Groups

See Examples in Manual

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Module Eight: Engaging Employers: Making the Connection



Module Eight Objectives

- Understand the importance of engaging and retaining employers as valued partners
- How to approach employers
- Strategies for engaging employers



Why Employers?

- Employers should be valued partners in workforce development programs for the many ways in which they can:
 1. Provide youth with real life information on the world of work;
 2. Provide insight into current and future training needs and opportunities.



What Employers Want

- To be heard and understood
- Flexible training programs
- Minimum paperwork
- Benefits from the partnership
- Quality of management of services
- Accountability



Strategies for Engaging Employers

- Collaboration is a key part of business engagement
- Know your partner and identify their self interests
- Develop a menu of services
- Provide support
- Solicit and listen to employer feedback