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### HFD 414.01: Community Service Delivery I - Case Management

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## COMMUNITY SERVICE DELIVERY I – CASE MANAGEMENT

<b>Dept. Name</b>	-	Human and Family Development
<b>Course Number</b>	-	414
<b>Section</b>	-	01
<b>Total Credits</b>	-	02
<b>Building/Room</b>	-	Skaggs Room 246
<b>Time/Day</b>	-	Monday and Wednesday 6:10 p.m. – 7:00 p.m.
<b>Facilitator</b>	-	Susie Morrison Skaggs Building Room 370 243-5763
<b>Office Hours</b>	-	Please schedule appointments

**Course Description:** This course will prepare students with a foundation of knowledge and practical applied experiences in case management, team functioning, advocacy, working in collaboration with families and other service providers, support coordination, early intervention legislation, efficacy research, and building switch toys. The course will be interdisciplinary in nature with guest instructors from various departments at the University and experts in the community presenting information on their areas of expertise. The basic assumption of the course is that learning results from a continuing process of rational discourse. Within the course there are both opportunities and responsibilities. Your opportunity is to learn. Your responsibilities are to maximize your learning from the course, maximize the learning of your classmates, and to apply what you learn to your work and personal life.

### Course Requirements:

1. **Master the basic competencies.** You are expected to know more after taking this course than you did before.
2. **Think critically about the course content and topics** to achieve understandings and insights.
3. **Explain precisely to classmates your learning, insights, and conclusions.**
4. **Ask others to share their knowledge,** conclusions, and insights with you. When they do so, listen carefully.
5. **Engage in intellectual controversy.**
6. **Get your work done on time.** You cannot deprive classmates of their opportunity and obligations to help you improve your understanding, conclusions, and insights.
7. **Plan to apply what you have learned to improve the quality of your work and personal life.**
8. **You are required to come to class.** A portion of your final grade is based upon attendance. Attendance will be taken each class period.

9. **If it appears that you have come to class unprepared (not reading required readings or completing assignments) you may be given a unannounced quiz.**
10. **If you miss a class, either excused or unexcused you will need to obtain the assignment for that class day and complete it by the next class session (you must complete the assignment, even if students who attended class did not do the assignment).**
11. **You will receive an incomplete in the course until all assignments and exams are completed.**
12. **If you have more than three unexcused absences you will lose one letter grade off your final grade. If you have more than five unexcused absences you will receive an F in the course.**
13. **If you are a student with an identified disability, it is your responsibility to inform me at the outset of this course of the disability and the way(s) in which I may be able to accommodate your needs. I will consult with Disabled Student Services and arrange for the needed accommodations.**

## **ATTENDANCE POLICY**

1. You are required to come to each scheduled class period. A portion of the course grade is based upon your attendance. Attendance will be taken each class period.
2. **If you miss a class, either excused or unexcused, you will need to contact Susie Morrison and obtain that day's assignment, as well as, the applied work that was done in class. You will need to make up all in-class assignments (hint – they are always easier to do in class as a group, as opposed to doing them by yourself.)** The applied work assignments will be graded on a pass (1)/fail (0) basis and will contribute to a significant portion of your grade. You will receive an incomplete in the course until the applied assignments are made up. You are responsible for getting copies of the handouts from Susie Morrison or making your own copies of handouts from your peers.
3. **If you have more than three unexcused absences (hint – you did not notify Susie Morrison), you will lose one letter grade off of your final grade. If you have more than five unexcused absences, you will receive an F for the course.**

## Course Calendar

### January

#### **28** (Tuesday) **Introduction**

#### **30** (Thursday) **Lecture 1: Case Management Values and Attitudes:**

- 1) identify questions and issues regarding case management
- 2) assess existing perceptions, knowledge, and skills related to case management
- 3) explain the principles of effective case management practice
- 4) identify personal values and attitudes that support or interfere with effective case management practice

### February

#### **4** (Tuesday) **Lecture 2: The Basics of Case Management:**

- 1) define case management
- 2) describe the dual focus of case management
- 3) describe the process of case management
- 4) describe the functions of case management
- 5) define the roles of a case manager
- 6) identify how historical, social, and legislative changes have influenced case management practices
- 7) describe the historical, social, and legislative context for case management
- 8) identify the purpose of case management for agencies serving children and their families
- 9) apply case management concepts to case management practice

#### **6** Feb. (Thursday) **Lecture 3: The Service System in Montana:**

- 1) describe the structure of Montana's system of services to children and families
- 2) name and locate state and regional programs serving children and families
- 3) describe the components of the public service system in Montana (e.g., social services, child mental health, adult mental health, vocational rehabilitation, health services, social services, etc.)

- 4) describe the components of a comprehensive community-based service network
- 5) identify the local public and private services and describe their functions
- 6) identify gaps in the local service network

**11**<sup>Feb. (Tuesday)</sup> **Lecture 4: Cultural Diversity and Cultural Competence in Personnel Providing Case Management Services:**

- 1) define the major types of diversity and explain why they have bearing on practice with children and families involved in the case management system
- 2) explain the significance of diversity for children and families
- 3) define the values that are associated with respect for diversity and that provide the basis for culturally competent practice
- 4) understand the process for developing respect for and knowledge about diversity
- 5) the characteristics of culturally competent systems of care
- 6) identify own cultural roots
- 7) describe how culture affects attitudes, values, and world views
- 8) describe types of information needed to develop culturally specific knowledge about diverse groups
- 9) identify several methods of gaining knowledge about diverse cultural and ethnic groups
- 10) assess the influence of culture in family and individual development
- 11) apply culturally specific knowledge when assessing children and their families
- 12) assess and respond to issues of difference when working with the child, family, and other service providers.
- 13) Incorporate empowerment strategies and family strengths approach in intervention planning
- 14) facilitate the family's ability to work with the professional community

**13**<sup>Feb. (Thursday)</sup> **Lecture 5: The Case Manager, the Process, and the Child- Serving System**

- 1) describe the factors influencing the effectiveness of case management
- 2) develop strategies for enhancing the effectiveness of case management

- 3) describe issues in assessing services through other agencies
- 4) know how to gather information relating to eligibility requirement, referral process, fee schedule, and payment options for local services
- 5) develop a mechanism for maintaining a resource file
- 6) define a collaborative relationship
- 7) list mechanisms which support inter-professional collaboration
- 8) identify means of improving collaboration with other agencies and professionals
- 9) describe the intake process including both the initial assessment and the case manager's ongoing role
- 10) describe the role of the family and ways to increase family involvement in the assessment, service planning, and monitoring
- 11) describe the service planning process and the roles of the case manager, family, and other service providers
- 12) describe the implementation and monitoring process and the roles of the case manager, family, and other service providers
- 13) develop strategies for feedback on service network functioning
- 14) describe advocacy for individuals and groups of individuals
- 15) describe formal and informal advocacy processes for children, adolescents, and families
- 16) describe case management responsibilities for evaluation at individual and systems level

## **18<sup>Feb.</sup> (Tuesday) Lecture 6: Case Management Functions and Process: Collaborating with Families:**

- 1) describe the nature of and explain the importance of parent/professional collaboration to the success of the case management process
- 2) explain the significance of family uniqueness and the diversity among families, and describe its effect on relationship-building and collaboration, including issues of structure, socioeconomic status, race, ethnicity, age, and gender
- 3) describe the case manager's role with the family in assessment in relation to the agency's case management model
- 4) use the process of gathering information to carry out a case management assessment with a family, as a means of building a relationship with a family

- 5) utilize strategies to insure that families who do not want help understand their options
- 6) describe the need for confidentiality
- 7) describe collaborative service planning with the family
- 8) describe how to maintain an ongoing collaborative relationship with a family
- 9) develop a resource and support coordination plan with a family
- 10) monitor and evaluate services with a family
- 11) problem-solve with family members around differences between the interests of the child and the interests of the parents/care-givers, and among family
- 12) describe the progression of the parent/professional relationship including considerations for termination and transition
- 13) describe ways of facilitating the successful transition to other services

**20<sup>Feb.</sup>** (Thursday) **Lecture 7: Case Management Functions and Process: Collaborating with Other Service Providers:**

- 1) describe the nature of inter-professional collaboration and its importance to the success of the case management process in the service network
- 2) define the roles of the case manager and other service providers that relate to inter-professional collaboration
- 3) identify skills needed for effective collaboration
- 4) describe how agency structure and policies affect the collaborative process
- 5) define potential barriers to collaboration among professionals, including differences in professional functions, knowledge base, different ways of working with families and "turf" issues
- 6) describe how these barriers can affect collaboration.
- 7) define interventions that support network development for collaboration
- 8) identify why community relations are an important aspect of case management
- 9) apply knowledge of service network to link identified concerns with potential resources
- 10) define family-specific collaboration activities
- 11) describe issues of confidentiality in individual identification and outreach
- 12) identify steps for building relationships within the service network

**25<sup>Feb.</sup>** (Tuesday) **Lecture 8: Case Management Functions and Process: Collaborating with Other Service Providers (con't.):**

- 1) describe the case manager's role with other professionals in assessment and service planning
- 2) explain guiding principles and demonstrate skills needed to collaborate with other service providers in assessment and service planning
- 3) determine which service providers to involve in assessment and/or service planning
- 4) facilitate effective referrals
- 5) state implications of legal and ethical decisions relating to individual confidentiality and privileged communication for inter-professional collaboration
- 6) identify strategies for sharing information, and procedures for protecting individual's confidentiality
- 7) describe the case management monitoring function to other service providers
- 8) describe how monitoring can be used to strengthen collaborative work
- 9) problem solve around differences between the preferences of the family and the opinions of professionals
- 10) problem solve around differences among service providers and problems in the service network
- 11) describe the case manager's advocacy function with other professionals
- 13) describe the principle of individual confidentiality in inter-professional collaboration

**27<sup>Feb.</sup>** (Thursday) **Lecture 9: Crisis Intervention:**

- 1) define crisis
- 2) define crisis as a situation that presents both danger and opportunity
- 3) describe how families differ in the perceptions of a crisis
- 4) describe the sequence of events that lead to the development of a crisis
- 5) describe the role of the case manager in crisis intervention
- 6) describe the value of anticipating and planning for crises with the family
- 7) describe how crises are handled in their home community
- 8) demonstrate the skills they have to handle a crisis
- 9) describe ways in which the family may redefine the case manager's role in the context of crisis



# March

## **4<sup>(Tuesday)</sup> Lecture 10: Crisis Intervention (con't.):**

- 1) identify why it is necessary to develop a plan of action based on the family's perception of the situation
- 2) demonstrate their ability to deal with families undergoing crisis in ways that are empathic and understanding of the family
- 3) describe why physical safety of the child must take precedence over other considerations
- 4) list the steps they would take in situations in which the child must enter placement on an emergency basis
- 5) identify the steps to take in defusing a potentially dangerous situation
- 6) recognize their own proprioceptive cues
- 7) describe why it is important to look calm in the midst of crisis
- 8) describe the effects of drugs and alcohol on a crisis situation
- 9) describe factors that would lead you to seek assistance in a crisis

## **6<sup>March (Thursday)</sup> Lecture 11: Developing Teams and Facilitating Team Functioning:**

- 1) define teamwork
- 2) list the advantages of team decision-making in services for children and families
- 3) describe how teamwork among agencies enhances service provision
- 4) describe how to effectively participate effectively on a team
- 5) demonstrate the ability to participate effectively on a team
- 6) describe how values, behaviors, and disciplinary perspective affect team functioning
- 7) describe how the composition and structure of a team influence its functioning
- 8) identify the role family members play on a team
- 9) describe the roles the case manager might play on a team
- 10) describe the differences between a group and a team
- 11) describe the stages of team development

## **11<sup>March (Tuesday)</sup> Lecture 12: Facilitating Team Functioning:**

1. describe the characteristics of a well-functioning team
2. list and describe the steps in team decision-making

3. demonstrate the ability to participate in effective team decision-making
4. demonstrate the ability to engage in team conflict resolution
5. describe the value of conflict in decision-making
6. describe the strategies and resources for resolving conflict
7. describe the role of case manager in facilitating team functioning
8. describe the different types of team leadership
9. list the qualities of an effective leader
10. demonstrate the ability to lead a team

## Spring Break 24-28

### **13** <sup>March (Thursday)</sup> **Lecture 13: Legislation and Philosophical Underpinnings:**

- 1) describe the philosophical intent of early intervention legislation
- 2) describe the why the need for family-centered services arose
- 3) describe why collaborative service provision is necessary in early intervention
- 4) describe the significance of Part H/Part C early intervention programs
- 5) describe the differences between Part C and Part B

### **18** <sup>March (Tuesday)</sup> **Lecture 14: Service Coordination in Early Intervention/Montana's Part C System**

- 1) describe the required components of an early intervention system
- 2) identify why early intervention services vary across the country
- 3) describe the differences between the IFSP and the IEP
- 4) identify how the basic elements of Part C and Part B might affect the mental health system
- 5) describe the need for attention to the transition of children and families from one service system to another within the service network
- 6) describe the role of the service/support coordinator
- 7) describe the role of the family in the selection of the service/support coordinator
- 8) identify strategies involved in effectively addressing the resources, priorities, and concerns of eligible families

- 9) identify how the support coordinator can facilitate family participation in the service delivery process

**20** <sup>March (Thursday)</sup> **Lecture 15: Service Coordination in Early Intervention con't.):**

- 1) identify the population of children and families served in the Part C and Part B system
- 2) identify the population of children and families serviced in Head Start, Early Head Start, Home-based Head Start, and Even Start
- 3) describe the role of the state Interagency Coordinating Council (FSSAC)
- 4) describe why collaboration among service systems is essential for effective early intervention
- 5) identify advocacy and support organizations for children and families in the state
- 6) identify the early intervention system in Montana
- 7) describe the strategies to determine early intervention systems and supports in other states
- 8) list and describe how to access early intervention advocacy organizations

## **April**

**1** <sup>(Tuesday)</sup> **Lecture 16: Procedural Safeguards:**

- 1) identify the parents rights guaranteed by Part C
- 2) identify the procedural safeguards guaranteed by Part C
- 3) identify parent's rights guaranteed by Part B
- 4) identify procedural safeguards guaranteed by Part B

**3** <sup>April (Thursday)</sup> **Lecture 17: Parents as Advocates and Case Managers:**

- 1) demonstrate the ability to relate to family members in a nonjudgmental, supportive way
- 2) demonstrate their respect for family preference, choices, and values
- 3) identify why it is necessary to respect family preference, choices, and values
- 4) identify why it is necessary to identify the strengths and needs of all family members

- 5) describe why it is important to accept the family's right to choose their level of involvement in services for their child and family
- 6) identify strategies to enable parents to identify the roles they might take in case management and advocacy
- 7) identify strategies to enable families to access various forms of assistance and information

**8<sup>April</sup> (Tuesday) Lecture 18: Survival Skills for the Case Manager:**

- 1) describe how service gaps can impede the case management process
- 2) describe ways of tracking service providers
- 3) describe ways of addressing service gaps and inconsistencies in order to facilitate the case management process
- 4) identify specific strategies that can be utilized to increase service effectiveness and efficiency
- 5) describe the role of supervision in case management
- 6) identify why self-reflection is a necessary skill for a case manager
- 7) identify the necessary problem-solving steps
- 8) describe the skills necessary for effective decision-making
- 9) identify why self-directed learning is a necessary competency for a case manager

**10<sup>April</sup> (Thursday) Lecture 19: Taking Care of the Care Giver:**

- 1) develop strategies to support them as case managers
- 2) identify methods of stress reduction
- 3) identify strategies for developing peer support

**15<sup>April</sup> (Tuesday) Lecture 20: Research on the Impact of Early Intervention:**

- 1) describe the rationale for early intervention
- 2) identify the eleven major premises behind early intervention
- 3) describe the importance of early intervention
- 4) describe the effectiveness of early intervention for children and families
- 5) identify the impact of research on social policy for infants and young children with disabilities

**17<sup>April</sup> (Thursday) Lecture 21: Building Switch Toys:**

**22** <sup>April (Tuesday)</sup> **Lecture 21: Building Switch Toys: (cont.):**

- 1) describe the basics of series circuits
- 2) build a mercury head switch
- 3) build a toy or battery adapter
- 4) be familiar with the types of output devices you can use with switches
- 5) identify the devices used to modify the effect of switches and learn about fixing mismatches
- 6) utilize switches to stimulate development in the various domains

**24** <sup>April (Thursday)</sup> **Lecture 22: Characteristics of Quality Environments for Children:**

- 1) describe NAEYC's position on developmentally appropriate practice
- 2) identify characteristics of developmentally appropriate care for young children
- 3) describe the impact of physical arrangement of environments on children
- 4) describe the impact of the environment on opportunities to learn and socialize
- 5) complete an environmental rating scale at an early childhood setting

**29** <sup>April (Tuesday)</sup> **Lecture 23: Ethical Issues/Professional Rights and Responsibilities:**

- 1) identify the guidelines for resolving ethical dilemmas
- 2) describe some of the primary ethical issues in early intervention
- 3) describe qualities of the code of ethics for interventionists
- 4) describe when support coordination ends and counseling/therapy ends
- 5) describe the difference between a request and a subpoena
- 6) characterize the importance of confidentiality
- 7) describe the guidelines and importance of record keeping
- 8) describe limitations of confidentiality
- 9) describe when and how records can be accessed
- 10) identify strategies in record keeping that protect individual rights

# May

## **1** <sup>(Thursday)</sup> **Lecture 24: Process of Change:**

- 1) identify and describe the three states of the transition stage of change
- 2) describe the major characteristics of a transition state
- 3) describe why there is resistance to change
- 4) identify the elements of change
- 5) describe strategies for taking care of oneself during change
- 6) describe the process of change in relation to policy implementation

## **6** <sup>May (Tuesday)</sup> **Presentations**

## **8** <sup>May (Thursday)</sup> **Presentations**

**Article packets are available for purchase at University Bookstore. There are also 2 copies available in the reserve section of the library for students to check out on a short-term basis. The required texts will also be available in the reserve section of the library for short-term reserve.**

**Course Grading:** Course grades will be determined on the following percentages:

- 5% Attendance
- 10% Core Skills
- 5% Journal
- 30% Group/Individual Assignments
- 20% Syndrome Report
- 15% Eco-Map
- 15% Presentation

### **Caveat**

The above schedule and procedures in this course are subject to change in the event of extenuating circumstances. For those students who are taking the course for graduate credit, additional competencies will be assigned.