

Qualities of a High-Performing Case Manager



For the past year, the State Employment Leadership Network has been hosting a series of online events about the role case managers can play in improving employment outcomes for people with intellectual and developmental disabilities (IDD).

The role of the case manager/support coordinator is changing and becoming more complex. Case management requires knowledge and expertise in many areas, and community-based employment is just one of them.

An effective case manager/services/supports coordinator must demonstrate new competencies to meet community-based employment outcomes. The recent SELN online series, including the September 23, 2014 session, provides an overview of these competencies and examples of best practices of high-performing case managers/support coordinators. You may view the recording and materials, as well as past sessions, at:

<http://selnmembers.org/webinars/casemanagement>

The State Employment Leadership Network (SELN) is a cross-state cooperative venture of state intellectual and developmental disabilities that are committed to improving employment outcomes for adolescents and adults with developmental disabilities. SELN online discussions are chosen based on conversations with individual member states, as well as high profile and critical issues circulating around the country. Summary documents provide an overview of the sessions and highlight the resources available and knowledge required to achieve best practices.

The SELN is a joint program of the Institute for Community Inclusion at UMass Boston and the National Association of State Directors of Developmental Disabilities Services.



www.seln.org

Key takeaways:

Today's case managers and service/support coordinators:

- ❖ Recognize that families are the nation's true long-term care systems of support. Case managers must partner with and rely on families by cultivating trust and open communication. Presenting new ideas may take time and might be rejected many times before the ideas are accepted into a family's culture.
- ❖ Understand challenges to community-based employment for people with IDD, including difficulty navigating available resources, which system provides which services, and a local community's cultural attitudes and biases.
- ❖ Listen, interpret, and assimilate the information gathered day to day with individuals and families. Person-centered thinking is evident in all activities with the individual.
- ❖ Emphasize specific and concrete employment goals in the individual service plan (ISP), and uses tools to discover an individual's needs and interests and to plan long-term objectives. These tools include relationship mapping, communication charts, and learning logs.
- ❖ Have a basic understanding of work incentives and Social Security benefits, and know where to point families and individuals to delve deeper into the specifics and details.

State IDD agencies depend upon strong case managers/service coordinators to improve employment outcomes. Therefore, agency leaders must hire people who believe in and are committed to employment for all individuals with disabilities. These staff members must also be able to build relationships, network, negotiate, and manage conflict.

To ensure that case managers are successful, organizations should orient and train new staff, and provide ongoing professional development opportunities. With this support, staff members can build upon their current skills and learn new best practices in the field.

Raising Awareness & Providing Education Around the Value of Employment



For the past year, the State Employment Leadership Network has been hosting a series of online events about the role case managers/support coordinators can play in improving employment outcomes for people with intellectual and developmental disabilities (IDD).

The role of the case manager/support coordinator is changing and becoming more complex. Case management requires knowledge and expertise in many areas, and community-based employment is just one of them.

An effective case manager/services/supports coordinator must demonstrate new competencies to meet community-based employment outcomes. The session on October 30, 2014 reviewed different communication strategies and provided tips on how to build those skills. You may view the recording and materials, as well as past sessions, at <http://selnmembers.org/webinars/casemanagement>.

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Key takeaways:

- ❖ The message that needs to be communicated is simple and universal: everyone has the right to, and can, work in the community, regardless of disability type and severity.
- ❖ The case manager/support coordinator understands that different approaches must be used with agencies, employers, or individuals to meet unique needs.
- ❖ Successful communication strategies to share the core message about work use multiple approaches. These may include training and community forums, social media, printed materials, or public service announcements. Before implementation, review current modes of communication to evaluate their effectiveness.
- ❖ Allow stories of real people working in the community to deliver the message. Success stories offer hope and give inspiration. Put them on your website or other distribution outlets.
- ❖ Plug the role of employment in people's lives wherever you can. Mention it at every meeting, in guides, and when exploring future goals with people with disabilities and their families. Use the success stories to convey the creative options used by others. Culturally and generationally, having a job is the "new norm" for people with disabilities, and support staff play a role in outlining what this can and should look like.
- ❖ Raise awareness with individuals and their families through conversations. Case managers/support coordinators should express high expectations about employment, communicate that work is fundamental to earning the means to exercise our freedoms, and emphasize that everyone has the right to work in the community. Conversations about jobs should start at a young age.

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An effective case manager/services/supports coordinator must demonstrate new competencies to meet community-based employment outcomes. The session on December 2, 2014 emphasized the importance of earning income through work and understanding the impact of working on public benefits. See the attached word doc. You may view the recording and materials, as well as past sessions, at:

www.selnmembers.org/events/casemanagement

Key takeaways

Today's case managers and service/support coordinators:

- ❖ Explain that there are various work rules and incentives to help people try and work while protecting their benefits. These rules are complicated, but before people can make a decision about working, they need to understand the big picture.
- ❖ Make sure clients see the potential monetary benefits of employment, which can be a path to long-term financial well-being.
- ❖ Convey the message that work has value beyond a paycheck. A job increases autonomy and choice, improves self-esteem, and promotes skills development. Working also facilitates social connections.
- ❖ Understand that earnings and benefits are not an either/or choice. Articulate the ways individuals can generally maintain necessary benefits while they are adjusting to working and earning a paycheck.
- ❖ Identify some potential work incentive opportunities that could fit the individual's needs.
- ❖ Remain honest and transparent. You don't need to have all the answers, and you shouldn't make guarantees. But reassure the person that you can connect them to resources that will help them make informed decisions about working.
- ❖ Provide individuals and families with a clear and consistent message about the importance of work. While earned income from work may have an impact on public benefits, it is important to realize the potential for the combination of the two to generate a higher total monthly income. The only path out of poverty and toward financial well-being is through employment. A life surviving on benefits means the person will never get ahead—they'll just get by.
- ❖ Build awareness of and a relationship to local benefits specialists, ideally certified work incentive coordinators/specialists.
- ❖ Know that aspects of benefits management vary by state, and people moving from out of state will need assistance ensuring everything is in order.
- ❖ Understand how benefits may fluctuate over time, based on earnings and other circumstances. Benefits specialists can help the individual determine when to seek reinstatement, when to reapply, and how changes in income or other status impact benefits and adjustments that need to be made.

Terms to be familiar with:

❖ **PASS (Plan for Achieving Self Support)**

www.ssa.gov/disabilityresearch/wi/pass.htm

Plan for Achieving Self Support is an earned income and resource exclusion that allows a person who is disabled or blind to set aside income and/or resources to reach an occupational goal. (Applies to SSI).

❖ **IRWE (Impairment Related Work Expense)**

www.ssa.gov/ssi/spotlights/spot-work-expenses.htm

Impairment Related Work Expenses allow an individual to deduct certain work-related items and services that are needed to enable the beneficiary to work. The cost of expenses must be paid out of pocket with the income earned, not paid by some other agency providing services. (Applies to SSDI and SSI).

❖ **SGA (Substantial Gainful Activity)**

www.ssa.gov/redbook/eng/definedisability.htm#a0=1

Substantial Gainful Activity is the performance of paid work in which countable income exceeds SGA per month. This monthly SGA amount will change annually based on the national wage index.

❖ **SSDI (Social Security Disability Insurance)**

www.ssa.gov/planners/disability/

Social Security Disability Insurance is a program under Title II of the Social Security Act. It is a cash benefit program for individuals who have worked and paid into F.I.C.A. (Federal Insured Contribution Act) and who meet the medical eligibility criteria and the SGA Test.

More definitions are available on the Social Security Administration's online glossary:

www.ssa.gov/redbook/eng/glossary.htm

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