

# Case Management I

## Managing the Client Relationship

---

---

---

---

---

---

---

---

## Case Management – Part 1

- LaDonna Cruse  
Virginia Housing  
Development Authority (VHDA)
- Luanne Gallagher  
Catholic Charities  
of Eastern Virginia (CCEVA)

---

---

---

---

---

---

---

---

## Case Management – Part 1

- Approach and Attitude
- Creating the Right Environment
- Listening and Communication
- Knowledge and Creativity
- Partnership and Accountability

---

---

---

---

---

---

---

---

Approach and Attitude

---

---

---

---

---

---

---

---

Approach and Attitude

Begin at the beginning....

it all begins with

**YOU!**

---

---

---

---

---

---

---

---

Approach and Attitude

Ask yourself...

**Who** **How**  
**Where** **What**  
**When** **Why**

---

---

---

---

---

---

---

---

Approach and Attitude

**Who?**

Who are your clients?

Can you relate to their needs?  
Do you really want to help them?

---

---

---

---

---

---

---

---

Approach and Attitude

**What?**

What does being a counselor mean to you?

What have your experiences been in life?  
Can you use those experiences to help others?

---

---

---

---

---

---

---

---

Approach and Attitude

**When?**

When are you at your best?

Are you distracted by anything else going on at home or at work?

---

---

---

---

---

---

---

---

Approach and Attitude

**Where?**

Where does counseling fit into your career plan?

Are you here because you want to be here?

---

---

---

---

---

---

---

---

Approach and Attitude

**How?**

How have you decided to make a difference?

Are you centered enough in your own life to objectively help someone else?

---

---

---

---

---

---

---

---

Approach and Attitude

**Why?**

Why do you come to work each day?

Are you fulfilling a call in your life in your everyday work?

---

---

---

---

---

---

---

---

## Approach and Attitude

- Body Language
- Unspoken Words
- Level of Caring

---

---

---

---

---

---

---

---

## Approach and Attitude

Be a part of the counseling experience



It's a delicate balance...

---

---

---

---

---

---

---

---

## Approach and Attitude

Remind yourself of...



---

---

---

---

---

---

---

---

# Create a Welcoming Environment

---

---

---

---

---

---

---

---

# Welcoming Environment

**Physical Comfort:**

- No confidential information visible
- Appropriate seating
- No visible/audible distractions
- Neat office appearance
- Lighting

---

---

---

---

---

---

---

---

# Welcoming Environment

**Counselor Presence:**

- Open body language throughout session
- Neat & professional appearance
- No distracting body movements
- Welcoming smile & tone

---

---

---

---

---

---

---

---

## Listening and Communication

---

---

---

---

---

---

---

---

## Effective Listening

- Listen with your **whole** body
- **“Centralize”** your client
- Look for verbal and **non**-verbal cues
- Encourage, but do ***not*** interrupt
- **“Stay”** with your client
- Ask questions to ensure **your** understanding
- **Summarize** what you heard

---

---

---

---

---

---

---

---

## Effective Communication

- Ask questions and **WAIT**
- **Match** communication choices with need
- Communicate **professionally**
- Use your **whole** body
- Ask questions to check for **client’s** understanding
- **Summarize** your message

---

---

---

---

---

---

---

---

## Knowledge and Creativity

---

---

---

---

---

---

---

---

## Knowledge and Creativity

### Knowledge Resources

- Formal classroom as well as “informal” learning:
  - Training classes & certifications
  - Internet research
  - Reading books and articles

---

---

---

---

---

---

---

---

## Knowledge & Creativity

### Knowledge Resources

- Formal classroom as well as “informal” learning (cont):
  - Professional interactions
  - Television & learning tapes/media
- Leverage contacts and affiliations
- Ongoing education requirements

---

---

---

---

---

---

---

---

## Knowledge & Creativity

Be Creative

- Draw on the experiences of others
- Be flexible in your thinking
- Try and try again

---

---

---

---

---

---

---

---

## Partnership and Accountability

---

---

---

---

---

---

---

---

## Partnership and Accountability

Partnering Successfully:

- Shared responsibility
- Understanding each other's roles
- Holding each other accountable
- Commitment to success
- Learning and teaching each other
- Celebrating together

---

---

---

---

---

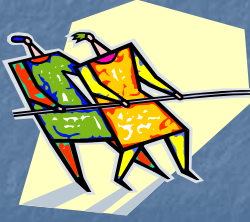
---

---

---

## Partnership and Accountability

Your  
Client Relationship  
is a  
Partnership  
*It takes two!*



---

---

---

---

---

---

---

---

## Partnership and Accountability

- Set expectations...
- Hold each other accountable...
- Commit fully...
- Learn and teach...
- Celebrate and keep moving!

---

---

---

---

---

---

---

---

## Partnership and Accountability



Build your  
partnership  
one brick  
at a time...

---

---

---

---

---

---

---

---

## Partnership & Accountability



Then, build out your  
framework,  
and,  
fill it in...

---

---

---

---

---

---

---

---

## Partnership and Accountability



*Finally, attach  
your roof...*

---

---

---

---

---

---

---

---

## Remember....

- Approach and Attitude:
  - It all begins with you
  - Clients are hearing you and SEEING you
- Welcoming Environment
- Listen with your WHOLE body

---

---

---

---

---

---

---

---

## Remember....

- Communicate with your whole body
  - Match communication choices
- Use all of your knowledge resources
  - Formal and informal
- Be creative and flexible

---

---

---

---

---

---

---

---

## *Remember....*

- Create a partnership
  - Celebrate your success
  - Take it to the next level
- Celebrate your OWN successes!

---

---

---

---

---

---

---

---