

## NACM's 19th Annual Case Management Conference A Success!

NACM's 19<sup>th</sup> Annual Case Management Conference was a rousing success! Held October 1-3, 2013, in Atlantic City, New Jersey, the conference hosted over 330 attendees who enjoyed the 90+ workshops and more than 100 speakers.

The theme of the conference was *Case Management: A Professional Career*. Focus areas included health care, case management skills, substance abuse, youth and family services, housing, peer-run programs, and many other topics. Presenters came from all over the United States, and were themselves quite diverse, including leading experts and first-time presenters. Handouts from presentations will soon be posted at [www.yournacm.com](http://www.yournacm.com).

NACM XCEL Award Winners from the 2013 Conference are as follows:

- **Case Manager/Service Coordinator**- Owen Camuso from FaSST/Connections
- **Peer Case Manager/Service Coordinator**- Juan Carlos Callejas from SRO Housing Corporation

- **Case Manager/Service Coordinator Supervisor**- Rachel Curry from Rochelle Family Center
- **Case Management/Service Coordination Program**- Reach-in C.A.R.E./LA-SAFE from New Orleans.

In addition to the XCEL awards, NACM also awarded the Innovation in Case Management Award, a new award that was sponsored by Service Access and Management, Inc. This award is designed to identify organizations or individuals who are providing innovative case management practices. The 2013 award winner was the Mental Health Association of Nebraska for their innovative programming in peer support that has shown some amazing results. Watch for a spotlight on their program in our next newsletter.

The conference was co-sponsored by RHD, Inc. and SAM, Inc. For more information about bringing a NACM conference to your area or co-sponsoring a NACM conference, please contact Theresa Henning at (402) 441-4385.



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### CASE MANAGEMENT GUIDELINES

PLAN AHEAD—BEAT THE  
CRISES

BE ACCOUNTABLE TO THE  
PERSONS YOU SERVE AND THE  
COMMUNITY

BE OPTIMISTIC ABOUT THE  
PERSON YOU SERVE—  
EXPECT IMPROVEMENT AND  
SOME DEGREE OF  
INDEPENDENCE AND THAT'S  
LIKELY WHAT YOU'LL GET

LET THE PERSONS YOU SERVE  
DECIDE WHAT  
ISSUES TAKE PRIORITY

GO WHERE THE PEOPLE YOU  
SERVE ARE—DON'T STAY IN  
YOUR OFFICE

GO SEE WHERE THE PEOPLE  
ARE AND TEACH THEM SKILLS  
WHERE THEY NEED THEM MOST

PROMOTE INDEPENDENCE;  
MODEL INDEPENDENCE

DEVELOP A LARGE NUMBER OF  
RESOURCES AND FIND THE  
BEST FOR EACH  
PERSON

REVISED FROM FUNDAMENTALS OF  
CASE MANAGEMENT PRACTICE BY  
NANCY SUMMERS



## Problem-Solving/Decision-Making (PSDM) Process©

Ervin R. Munro, M.S.

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
WHAT	HOW	WHAT	HOW	WHAT
Define the situation	Determine the emotional response (feeling) to the situation	List options/ alternatives/possibilities/ ideas to address the situation	Assess the response to each alternative/possibility/ option/idea	Select the best alternative to address the situation
<i>“What’s happening?”</i> <b>“What’s going on?”</b> <i>“What do you need?”</i> <b>“What’s on your mind?”</b> <i>“What would you like to talk about?”</i>	<i>“How are you feeling?”</i> <b>“How does that make you feel?”</b> <i>“How are you doing?”</i> <b>“How did you deal with that?”</b>	<i>“What have you done about it already?”</i> <b>“What do you see as a possibility?”</b> <i>“If you could change anything what would you do?”</i> <b>“What do you think would work in this situation?”</b>	<i>“How do you feel about that idea?”</i> <b>“How does that possibility work for you?”</b> <i>“How does this option Differ from that one?”</i> <b>“How do you think this alternative will work in your situation?”</b>	<i>“What would you like to do about it?”</i> <b>“What do you think is the best option for you?”</b> <i>“What alternative are you most comfortable with?”</i> <b>“What would you like to try in your situation?”</b>
Defining Situation		Exploring Options/Alternatives		Selecting Alternative

Often times, Case Managers work with people who may begin talking about an undefined situation/ problem. The person served may begin by saying, “I have a really big problem and I know you can help me. You’re a smart, compassionate person and I know you can fix this problem.” The Case Manager has no idea what the individual’s problem is. Because these kinds of scenarios happen all too often, it was necessary to develop a structured problem-solving/decision-making (PSDM) process so that Case Managers could help their clients more easily define their situations and focus on solving the problems at hand.

### Stage 1

When using the PSDM process, the Case Manager begins by asking a “what” question. This question can be framed anyway that feels comfortable, e.g. “What’s happening? What problem? What’s going on?”, etc. It doesn’t make any difference how you ask the question, as long as it begins with a “what.” This stage of the Problem-Solving/Decision-Making process, is referred to as the “head” stage (above-the-shoulders functioning). The client is asked

to define the situation for the Case Manager. This becomes the “issue” at hand.

### Stage 2

After the problem has been clearly defined, the Case Manager now assesses how the person is emotionally doing relative to the situation. You may ask, “How are you doing right now? How does that situation make you feel?”, etc. Again, the question can be asked in many different ways as long as it begins with “how.” This stage is referred to as the “body” stage (below-the-shoulders functioning). This is the expression of how the person “feels” about the situation. It is the emotional response to the situation. The “how” stages always go backwards to the “what” stages, i.e. “what” is the situation and “how” does the person feel about the situation.

### Stage 3

Now that the problem or situation has been defined, as well as the feeling about the situation, the Case Manager once again asks a “what” question, e.g. “What have you thought about to address this situation? What do you think you can do about the problem? What do you see as an answer to this

situation?” Again, it can be asked many different ways as long as it begins with “what.” Now we are back into a “head” stage and the person served, in conjunction with the Case Manager, begins to brainstorm around how to resolve the problem. The Case Manager is encouraged to write down as many options as possible. It is critical during Stage 3 that you do NOT judge anything the person served proposes, no matter how absurd it may sound. The idea is to get the individual to consider possibilities in resolving the matter and taking ownership of the situation. If the person is judged, they will shut down and refuse to address the problem. This is called the “hump” stage. If you can get the person over the hump, it is downhill from there. Persons served are often hesitant to answer the question, “What do you think you can do to address this situation?” If they answer the question, it infers that they have to take responsibility for the situation. The individual may have been hoping to just drop the problem on your desk and wait for your answer.



**PSDM Process©**  
*Continued*

However, we never do for people what they can do for themselves. Every time we do for persons what they can do for themselves, we disempower them. Our goal should always be to empower persons served, aiming toward self-sufficiency. Therefore, it is critical that we work with the person to brainstorm without any form of judgment. Just selecting ideas, no matter how bonkers they are, is moving forward in the process. We want to keep a positive mindset going at all times.

**Stage 4**

Now that the Case Manager, in conjunction with the person served, has developed a long list of possibilities to address the individual's situation, we go on to another "how" stage. Ask the person served how he/she feels about each option and if he/she feels it will work in his/her situation. The Case Manager might say, "How do you feel about this possibility? How does this option feel in terms of addressing the situation?", etc. It's as if the person served is trying on each option and seeing how comfortable it feels in terms of addressing his/her problem. It's critical that ONLY the person served defines how he/she feels and not the Case Manager as they are the only one who knows what's comfortable for them. As the process goes along, the person served will discard several of the options as not feeling comfortable. Through this process of elimination, the client will finally come down to one BEST option (with perhaps a few backup options).

**Stage 5**

After the person served has gone through the process of elimination, the Case Manager might say, "So, we've discussed a

lot of possibilities to address your situation. What do you think is the best thing for you to do right now?" Now you are back to the "what" questions again. The individual has to carefully think about the process he/she has just been through and what is the most practical and comfortable option to select. This becomes the goal to place into the Service Plan. Now, it's simply a matter of the person served implementing the plan.

A **Sample Dialogue** may go something like this:

**CM:** "So what's going on?" (Stage 1)

**PS:** "I lost my SSI check and I can't pay the rent."

**CM:** "Wow... how are you doing right now?" (Stage 2)

**PS:** "Not very good... I'm really scared that I'm going to lose my housing and be homeless again."

**CM:** "Have you thought about what you can do to get the rent money?" (Stage 3)

**PS:** "Not really. I need your help."

**CM:** "Okay, what have you thought about already and let's see if we can come up with a list of some other possibilities as well."

Person served and Case Manager develop a list of ideas to obtain money for rent.

**PS:** "I could probably call my mom. Maybe I could pawn something until my new check comes. Since it's only \$60.00, perhaps I can collect cans. I could panhandle."

The Case Manager is free to throw in a few options during this process as well, as long as it is two or more. You don't want the person served to think you are

suggesting only one way to address the problem. They must take ownership for the selected idea.

**CM:** "Wow, it looks like we came up with a lot of possibilities. How do you feel about calling your mom?"

Go through each alternative and ask the person served to try them on. (Stage 4) Eliminate those that they feel may not work or they are uncomfortable with.

**PS:** "I'm not too sure my mom would give me \$60.00 again. I asked her once before."

**CM:** "Okay, how do you feel about taking something to the pawn shop?"

**PS:** "I'm okay with that. I took my TV in there once before."

After completing this process, ask the person served "what" alternative he/she wants to do.



**CM:** "Well it looks like we've explored a lot of options, what do you think you want to do right now?" (Stage 5)

**PS:** "I'm going to take my TV to the pawn shop."

**CM:** "Okay, great. Let me know how this all works out for you."

The Case Manager then records the identified situation and solution into the person's progress notes.

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*Ervin R. Munro, M.S. currently serves as the Director of Social Services at SRO Housing Corporation in Los Angeles, CA. He oversees supportive services programs for homeless persons in the "Skid Row" area of downtown Los Angeles.*



**NACM CAPTURES RHD'S ATTENTION & DEVOTION:**  
*How do you become a conference co-sponsor?*

**Jim Piasecki, Ph.D., Corporate Assistant Director, RHD**

It started with a NACM flyer in the winter of 2012, requesting proposals to present at the NACM Conference in Los Angeles. A Resources for Human Development (RHD) program serving individuals with behavioral health issues in twelve homeless shelters in Philadelphia was intrigued and wanted to attend the conference and, hopefully present. The cost and time away were a concern, so the challenge was set that these interested parties could attend the conference only if their proposals were accepted. They were accepted, and RHD cautiously moved into the ranks of NACM. Caution quickly changed to increasing intrigue with this organization. This was due to the warmth and friendliness of the NACM conference organizers, the ever-present Ervin Munro and his co-sponsoring SRO Housing Corporation, and especially the vast array of presentations making choice a challenge for each slotted time in Los Angeles.

Then, the fateful call came from NACM's Nebraska headquarters informing RHD that the 19<sup>th</sup> Annual NACM Conference was to be on the East coast in 2013, and asking if RHD might be interested in co-sponsoring the event. A day of consultation was followed by a definitive "Yes," along with our request on where to begin. A telephonic support and lifeline was established amongst NACM, RHD, and Service Access Management (SAM), the other co-sponsor. Weeks became months

and RHD participated in building a conference with others. Skills were practiced and new skills were developed in reviewing proposals, determining the content, and setting the numerous details for the three-day conference. RHD's mission is to provide caring, effective, and innovative services that support people in building better lives for themselves, their families, and their communities. It is composed of more than 160 programs in 14 states, serving people with a variety of challenges that include intellectual and developmental disabilities, mental illnesses, substance abuse, and homelessness. Our mission dovetailed perfectly with NACM's mission of providing "case managers and other service coordination practitioners with an opportunity for professional growth and for the promotion of case management."

The 2013 NACM Conference at the Revel Hotel in Atlantic City was "a dream come true" for RHD. The RHD presenters in L.A. had successfully joined with the RHD Conference Committee to promote the conference to the greater RHD. More than 70 staff from 14 different RHD programs in five different states attended the dream in A.C. For some, it was their first time presenting at a national conference; for many it was the first national conference attended!

"The presentations really made me think and consider doing something new", said Toni

Bonvillian, Director of RHD's Reach-In C.A.R.E. "The breaks became times to link not only with staff from other RHD programs, but with other agency representatives from around the country. During the conference, our conversations became more animated, as the elegance of the setting combined with the intimacy of the conference space worked its magic."

RHD embraced the hope and vigor of the conference in the workplace by promoting a "1:1:1 Challenge" for all attendees. The challenge was to utilize something for self, something for your team, and something for your program or corporation. We are all actively pursuing this and tracking progress at the one-month, three-month, and six-month marks to ensure that we have met the challenge and to personally measure the result and outcome.

RHD's experience of the 19<sup>th</sup> NACM Conference has devoted us to the mission of NACM as we learn to help other humans share their humanity on the quest for recovery and resiliency in our common world.

In speaking with many participants, nearly all were refreshed by the experience, with many so inspired by the various presentations that they left with a renewed sense of hope and vigor in providing service in the community. All left with the hope that RHD will continue to be involved and offer assistance at the 20<sup>th</sup> NACM Conference!

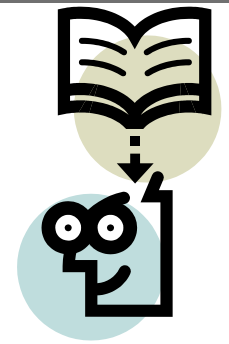
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## CALL FOR ARTICLES

Are you or someone in your agency interested in submitting an article to be published in upcoming newsletters?

We are interested in articles focusing on special populations, behavioral health, and case management approaches. Our 'Membership Spotlight' is a time to focus on an agency or member involved in NACM that would like to share successes and how they came about. If there are other topics you feel would be beneficial to share across the nation, please let us know!

Article submissions can be sent to : [nacm@yournacm.com](mailto:nacm@yournacm.com)



**CHECK OUT OUR WEBSITE AT:  
[WWW.YOURNACM.COM](http://WWW.YOURNACM.COM)**

## *MEMBERSHIP INFORMATION*

The mission of NACM is to provide case managers and other service coordination practitioners with an opportunity for professional growth and for the promotion of case management. NACM accomplishes these goals through educational meetings and conferences, news and communications, and policy development that continues the definition and refinement of the case management process.

### ***10 GREAT Reasons To Join NACM***

1. The **ONLY** national professional network of case managers and service coordinators.
2. Significant registration reductions for all seminars and conferences sponsored or supported by NACM.
3. Access to NACM website containing news, notices of upcoming events, articles of interest to case managers and service coordinators, and job postings.
4. Member e-mails about important events affecting the practice of case management/service coordination.
5. Assistance networking with other members about service innovations, reimbursement issues, and finding services for individuals and families who are relocating.
6. Receive support, local contacts, and leads when you relocate to another town or state.
7. Access to Regional Supervisor Seminars designed to meet the special and complex training needs of case managers and service coordinator supervisors.
8. Ability to nominate for the XCEL award, an award created to recognize outstanding accomplishments by case managers that are presented each year at the national conference.
9. Access to a cadre of experienced trainers on case management topics who can provide specialized training directly to your staff for a discounted rate.
10. An opportunity to prepare and exhibit information about your program or present at the next national conference.

You can join NACM for \$25.00. Please visit our website as listed above for a full brochure on membership and a form to be completed.