



Case Management Best Practices

Kristen Joyce, Trenia Miles, Yulanda Riley, and
Candi Quintall

Findings from the Survey of SNAP E&T Case Management

Kristen Joyce, Senior Researcher, Mathematica



Agenda

- Study overview
- Aggregate survey findings
- Case study findings
- Summary of lessons learned

Study Overview



Study objectives

1. Describe States' approaches to SNAP E&T case management
2. Provide a comprehensive picture of States' approaches to SNAP E&T assessment
3. Document States' approaches to offering participant reimbursements and other supports
4. Describe States' responses to the new case management program requirement in the 2018 Farm Bill

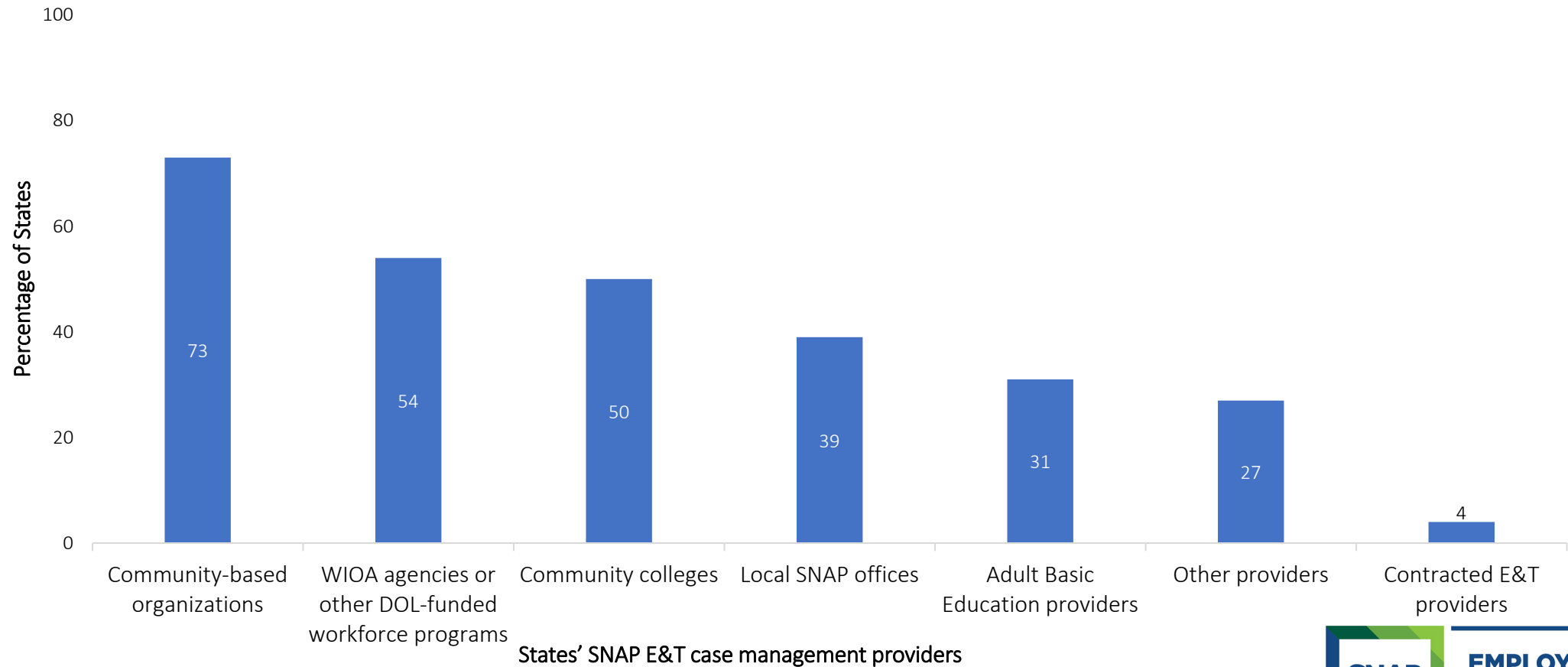
Data and methods

- Survey of 53 State SNAP directors
 - Questions about States' policies, guidance, and practice related to case management, assessment, and participant reimbursement and other supports
 - Fielded July through November 2021
 - 52 States responded, for a 98 percent response rate
- In-depth case studies of Arkansas, Kentucky, New York City, and Washington, DC
 - Conducted October 2021 through March 2022
 - Interviewed State SNAP and E&T staff, local SNAP staff, and E&T provider staff
 - Observed case management meetings and group activities

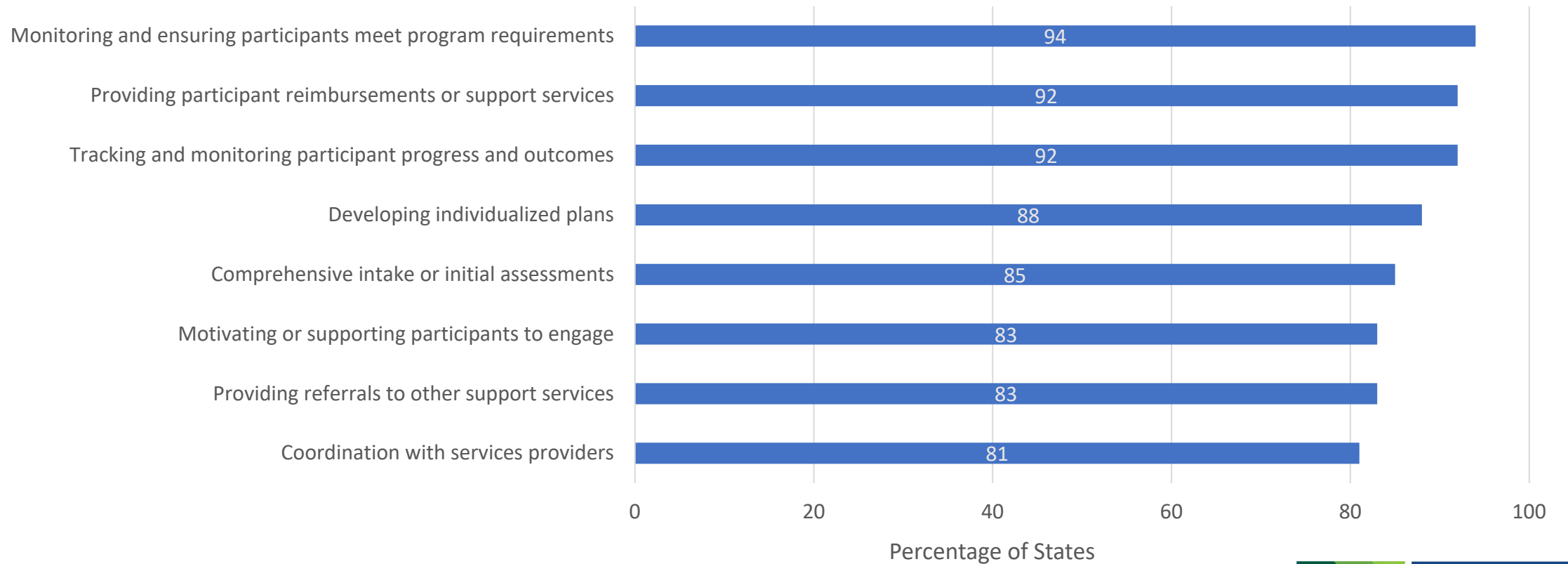


Aggregate Survey Findings

Approaches to case management: Case management providers



Approaches to case management: Services and activities



Approaches to case management: Techniques



- Just over half of States provide policy or guidance on specific techniques to use (52% of States; n=52)

Case management techniques specified for use in policy or guidance	Percentage of States
Employment coaching	74
Motivational interviewing	56
Teaming or case coordination	52
Trauma-informed case management	37
Policy or guidance gives flexibility	56
Sample size	27

Approaches to case management: Structure and communication



- How case management meetings are structured
 - One-on-one sessions (74% of States; n=38)
 - With one case manager at a time (70%; n=20)
 - Telephone (76%) or in-person meetings in the case manager's office (74%; n=42)
- How often case management meetings occur
 - Monthly (40%; n=50)
 - As needed or at other intervals (22%)
 - Weekly (8%)
 - Policy or guidance gives flexibility on frequency (26%)

Approaches to assessments: Initial assessments



- Policy or guidance on initial assessments
 - Initial assessments must be given to SNAP E&T participants in almost all States (98% of States; n=52)
 - Specific tools required in more than half of States (61 %; n=51)

Initial assessment tools specified for use in policy or guidance	Percentage of States
Participant background assessment tool developed by the State*	65
Needs and barriers assessment tool developed by the State*	65
Other tools	16
O*NET Ability Profiler	10
O*NET Interest Profiler	10
Test of Adult Basic Education (TABE)	10
Comprehensive Adult Student Assessment System (CASAS)	7
Policy or guidance gives flexibility	42
Sample size	31

*Tools were developed by or for the State, territory, or provider.



Approaches to assessments: Additional assessments



- Additional assessments must be given to SNAP E&T participants in half of States (50%; n=52)
- Specific tools or types of tools are required in less than half of those States (46%; n=26)
 - The most common tools included in policy or guidance are needs and barriers assessments and participant background assessments developed by or for the States

Approaches to assessments: Use of results



- How assessment results are used
 - Inform the development of individualized plans (97% of States; n=32)
 - Contribute to discussion with participants about service interests and needs (94%)
 - Identify programs or components for which participants are eligible or qualified (91%)
 - Determine reimbursements or support services participants need (78%)

Approaches to offering participant reimbursements: Most common reimbursements available to all who qualify



Participant reimbursement type	Percentage of States
Transportation assistance	83
Uniforms, work or interview clothing, tools, or other work equipment	73
Fees associated with tests, licensing, or credentialing	71
Books or other supplies for classes	71
Other participant reimbursements (for example, computers, hotspots, and technology support or access)	69
Sample size	52

Approaches to offering participant reimbursements: Methods and caps



- How reimbursements are disbursed to participants according to policy or guidance
 - Vouchers (63% of States; n=40)
 - Reimbursement for expenses paid (48%)
 - In-kind assistance (33%)
 - Methods vary by reimbursement type (55%)
- Reimbursement caps that States have
 - Individual caps (71 %; n=52)
 - Monthly caps (37%; n=52)
 - Annual caps (35%; n=52)
 - Lifetime caps (8%; n=52)

Case Study Findings



Case management in Arkansas

- Case management provided by 7 contracted providers, including Arkansas Adult Education
- Case managers are required to:
 - Assess participants using a standard initial assessment in Arkansas's management information system (SNAP Works) and the Test of Adult Basic Education
 - Use assessment results to develop an employment plan with participants
 - Meet with participants at least monthly to monitor progress and address barriers
- State agency administers participant reimbursements
 - Mainly transportation, up to \$50 per month and \$600 per year
 - Case managers make reimbursement requests through SNAP Works



Case management in Kentucky



- Offers case management and assessment through five contracted providers and nine “50-50 partners”
- Does not require a specific case management approach or frequency of contact
- Case management activities must include:
 - Initial assessment in kynect ability, Kentucky’s management information system
 - Referrals
 - Monitoring of participant progress
- Provides a standard \$25 a month transportation reimbursements for most participants



Case management in New York City



- Mandatory SNAP participants are served by contractors in one of three main pathways:
 - (1) young adults (Youth Pathways), (2) participants with disabilities (WeCare), and (3) adults 25 and older (Career Advance)
- Providers have flexibility in case management approach, but must include:
 - Multitiered assessment process to determine track and other needs
 - Employment and individual service plans
 - Contact at least monthly (virtual or in person)
- SNAP agency administers participant reimbursements
 - Mainly transportation, with most participants receiving a weekly unlimited MetroCard
 - Child care vouchers also available for those who need them



Case management in Washington, DC



- Offers case management in house and through 21 providers, including YWCA
 - Participants work with a SNAP agency case manager and a provider case manager, if applicable
- In-house case managers must:
 - Conduct an initial assessment (the SNAP Comprehensive Assessment)
 - Refer to E&T providers and support services
 - Provide job search assistance
 - Monitor participant progress during monthly meetings
- Providers have discretion in how they offer case management, but it must include intake, assessment, and individualized action plans
- The SNAP agency or providers administer reimbursements
 - There are no monetary caps



Lessons Learned

Case management: Lessons Learned

- Build strong, trusting relationships with participants
- Use case management teams for additional and coordinated support
- Offer an individualized approach with flexibility
- Have clear processes and procedures

Assessment: Lessons learned

- Keep assessments short and targeted
- Use strengths-based assessments
- Help customers feel comfortable while administering assessments

Participant reimbursements : Lessons learned

- Use a streamlined reimbursement process so participants receive timely support
- Reimburse participants in amounts that match their needs
- Build strong partnerships with community organizations for support services

For more information

- Kristen Joyce, project director
 - KJoyce@mathematica-mpr.com
- Kristen Corey, FNS project officer
 - kristen.corey@usda.gov

State of Arkansas

Dr. Trenia Miles, State Director

Yulanda Riley, SNAP E&T Program Advisor



Background

- Arkansas enacted law February 1, 2016-ABAWDS between the ages of 18-49 were subject to work requirement
- DHS & Adult Education partnership-50/50 reimbursement
- Phases I & II 2017-18 (35 counties)
- Phases III 2018-19 (33 counties)
- Phase IV 2019-20 (6 counties)
- Implemented virtual case management

Participation Considerations

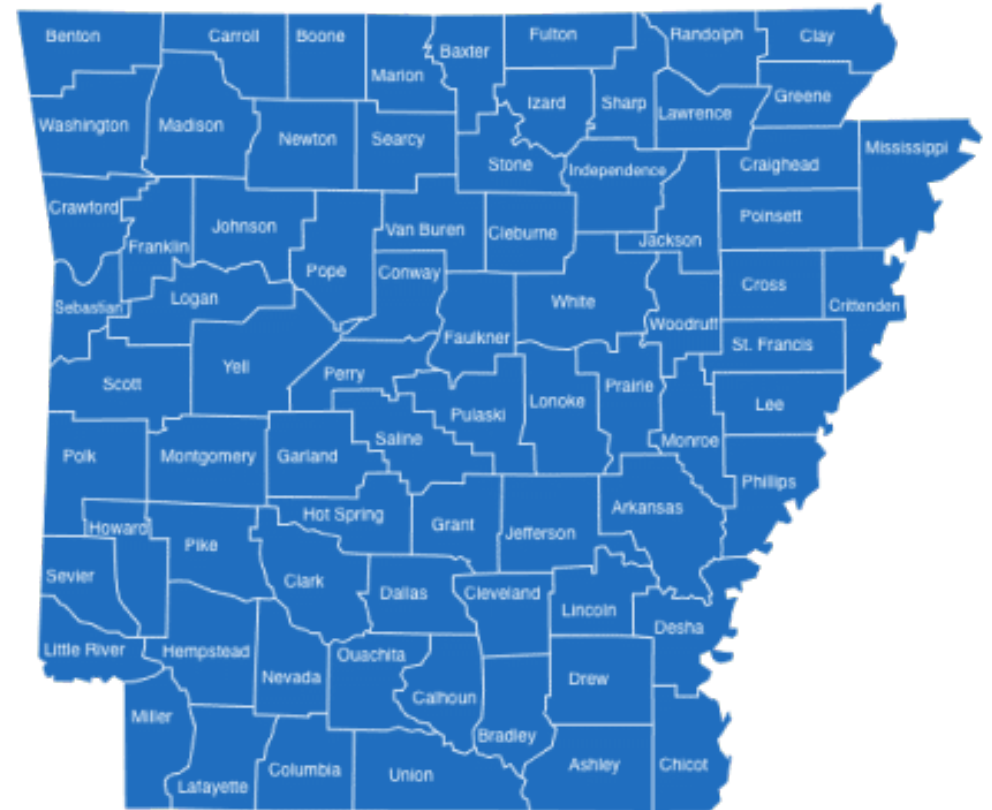
- Do we have the state funds to support the SNAP E&T program?
- How would repurposing funds set aside for adult education activities impact program operations of providers?
- How would Adult Education's performance be impacted by an influx of individuals who may or may not be committed to education?
- How will this impact the Finance Office?
- How do we get buy-in and support from the field?
- What training mechanisms will we need to implement to ensure standardizations across providers?

Negotiations

- Secured three full-time positions from DHS to carryout SNAP E&T Program.
- Utilized reimbursed funds from FNS/DHS to expand adult education services.
- Proposed number of instructional hours clients should participate in adult education.
 - For every hour spent in Adult Education, a client will earn two hours toward their required monthly 80 hours.

Arkansas Adult Education

- Has 37 providers and serve all 75 counties across the state of Arkansas.
- 34 of the providers have a SNAP E&T Coordinator.
- There are currently 38 SNAP E&T Coordinators across the state.



SNAP E&T Coordinator Role

SNAP E&T Coordinators are responsible for providing effective case management to SNAP E&T participants by:

- Conducting Intake Assessments and individualized service plans
- Monitoring participant progress
- Developing relationships with local DHS Program Eligibility Specialist
- Helping participants transition into the workforce or postsecondary education and training programs
- Being knowledgeable of certification programs and requirements, supportive services in your area, and specific scholarship requirements
- Developing partnerships with local employers, organizations, and program providers
- Providing career coaching services to include resume writing, interview tips, and job search assistance



Overview of the Training Process-Required

- SNAP E&T New Provider Training
- Career Services Provider Course - within 1 year of hire
- Monthly SNAP E&T Coordinator meetings
- Bi-annual SNAP E&T meetings



Training: SNAP E&T New Provider Training

- DHS SNAP Works Manual
- SNAP E&T Coordinator Manual
 - Roles and Responsibilities
 - Case Management
 - Career Coach Checklist
 - Reporting Performance Outcomes
- SNAP Works Training



Training: Career Service Provider Course

- The National Career Development Association (NCDA) Career Service Provider (CSP) Training and Certification program provides individuals with relevant skills and knowledge to assist in the field of career services.
- Adult Education Internal Trainer
- 11-week Hybrid Course
 - Examples of topics covered:
 - Helping Skills
 - Career Assessment
 - Career Development Models
 - Employability Skills
 - Labor Market Information and Resources

Training: Monthly SNAP E&T Coordinator Meetings

- DHS and Adult Education updates
- Community resources
- Coordinator feedback
 - Issues with referrals, scholarships, and/or reimbursements
 - Student success stories
- Employer partnerships
 - Job referrals
 - Resume and interview tips

Training: Bi-Annual Required Meetings

- DHS and Adult Education updates
- Monthly Reports
- Recruitment & Retention
- Professional Development
 - Bridges Out of Poverty
 - Customer Service
- Best Practices:
 - Developing Partnerships
 - Virtual Case Management
 - Recruitment

Case Management Process

- Career Coach Checklist
- Career Assessment (WOWI, O'NET)
- SNAP Works Assessment
 - Barriers to Employment
 - Connect clients to resources
 - Skills and Strengths
- Employment Plan
 - Goal Setting
 - Career Interests
- Assigning Components
- Case Notes

Virtual Case Management

- Clients that live in rural areas or have transportation barriers
 - Zoom
 - Google Meet
 - Phone or email
- Electronic forms that can be completed through email
- Future---virtual case management will be accessible to clients wherever they live in the state

How Adult Education Tracks and Monitors Performance

- Monthly reports
- Site visits
- One-on-one meetings
- Data match with Higher Education and Labor

Oregon SNAP E&T Navigators

Candi Quintall

