



Scaling a Statewide Coaching & Case Management Model in Colorado

Speakers:

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Goals for our time together

- **Understand** the promise of a case management approach centered on coaching
- **Identify** the key ingredients of a case management approach centered on coaching
- **Learn** from the Colorado experience of designing and implementing a coaching case management model statewide

1. Understand

the promise of a case management approach centered on coaching

What is case management?



How would you define it?

case management is...

Top case mgmt. activities in SNAP E&T: Survey says...

#1
activity

monitoring and ensuring participants meet SNAP E&T program requirements

#2
activity

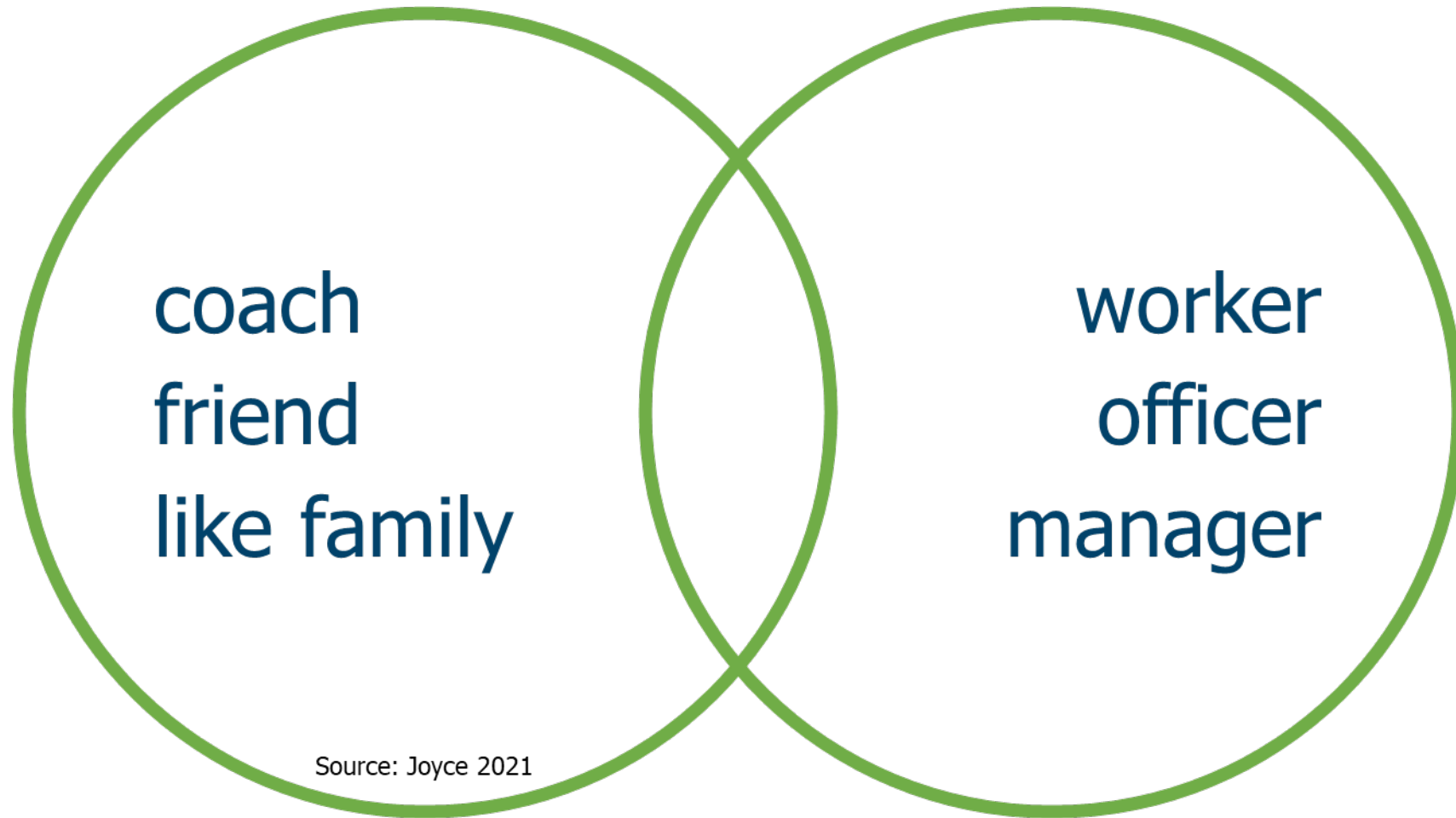
providing participant reimbursements or support services

#3
activity

tracking and monitoring participant progress and outcomes

Source: 2021 survey of SNAP E&T case management; sample size = 48 States (Joyce et al., 2023)

Relationships matter



Source: Joyce 2021

What if...

**coaching took center stage rather than compliance
in case management?**

How might things change?

Would things be any different or better?

A definition: Employment coaching

- Setting goals and developing action steps to meet those goals
- Non-directive
- Individualized to the person's needs and preferences
- Helps learn skills to set and work on goals independently
- Evokes and reinforces motivation to achieve goals
- Promotes accountability through regular discussions of progress

Source: Derr et al., 2024

A model: Goal4 It!



Source: Derr & McCay, 2018

A greater focus on employment?

Percentage of participants who set at least one goal during the first 9 months of enrollment on the topic of **employment**:

Goal4 It! Coaching

83.7
percent

versus

Traditional Case Mgmt.

75.7
percent

Evaluation of Goal4 It! in Jefferson County, CO
Statistically significant at the .01 level
Source: Derr et al., 2024

More communication?

Average number of total contacts per participant in the first 9 months after enrollment:

	Goal4 It! Coaching	Traditional Case Mgmt.
Month 1	1.7	1.2
Month 3	2.6	1.8
Month 6	3.2	2.3
Month 9	3.7	2.6

Evaluation of Goal4 It! in Jefferson County, CO. Contact includes in-person, phone call, email, or text message.
Statistically significant at the .01 level
Source: Derr et al., 2024

Easier to engage?

- Individuals with a basic skills deficiency***
- Voluntary participants in Ohio Works First***
- SNAP recipients**
- Individuals who are single parents**
- Required participants in Ohio Works First*
- Individuals who are pregnant or parenting*
- High school students*

Statewide survey of CCMEP staff in Ohio regarding ease of engaging subpopulation using Goal4 It!; n = 171
Statistically significant at the .001 level (***), .01 level (**), and .05 (*) level
Source: ICF, Ohio CCMEP Statewide Evaluation: Statewide Implementation and Outcomes Report, March 31, 2024.

2. Identify

the key ingredients of a case management approach centered on coaching

A vision in Colorado

"We deliver case management and coaching in a consistent, equitable, diverse, and inclusive manner across economic and workforce support programs."

Leaders...

are equipped to develop and support the key elements of case management and coaching among staff.

Case managers...

are motivated and empowered to routinely apply the mindsets and skillsets of case management and coaching in effectively carrying out their activities and responsibilities.

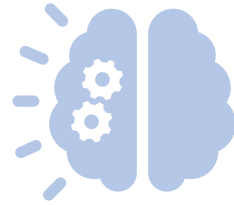
Defining case management in CO



Mindsets



how you
think
about it



Skillsets



your
ability to
do it



Activities



what you
do



Mindsets

- Relationships between staff and participants are built on respect, trust, and professionalism
- An individual's motivation is at the center of a process to help them achieve their goals
- Staff and participants alike benefit from self-reflection and intentional self-regulation
- We hold a holistic view of the family in service delivery



Skillsets

- Capably guides the participant through the program(s) and available services (**knowledge**)
- Champions the family's access to needed services and supports (**advocacy/brokering**)
- Competently manages and organizes cases and information (**organization**)
- Effectively facilitates setting, planning, and reviewing goals (**goal-directed coaching**)



Activities

- Facilitate assessment
- Use the coaching process
- Facilitate plan development
- Monitor and revise plans
- Connect to resources/support
- Document
- Maintain program knowledge
- Coordinate with other programs and systems
- Model and facilitate self-reflection and metacognition
- Integrate child and parent/caregiver activities

Adaptive vs. technical work

Case management

Comfortable,
familiar,
safe

Technical

Known solutions that
can be implemented
with current
knowledge, processes,
and procedures

Adaptive

Can only be addressed
through changes in
people's priorities, beliefs,
habits, and loyalties; often
requires discovering
something new, shedding
a way of doing things, and
finding a new way

Coaching

Uncomfortable,
exploratory,
dynamic

3. Learn

from the Colorado experience of designing and implementing a coaching case management model statewide

Colorado's implementation strategy

CMT-L

Training for county leaders in leadership and supervision practices that model and support the coaching case management approach

CMT

Training for direct service staff in the mindsets, skillsets, and activities – including motivational interviewing strategies and Goal4 It!

CPG

6-step guided process to help local leaders assess and strengthen the mindsets, skillsets, and activities among their staff teams

How's it going?

trainings...



local implementation...



What we're hearing...

We're already doing this!



What we're hearing...

There's no time.



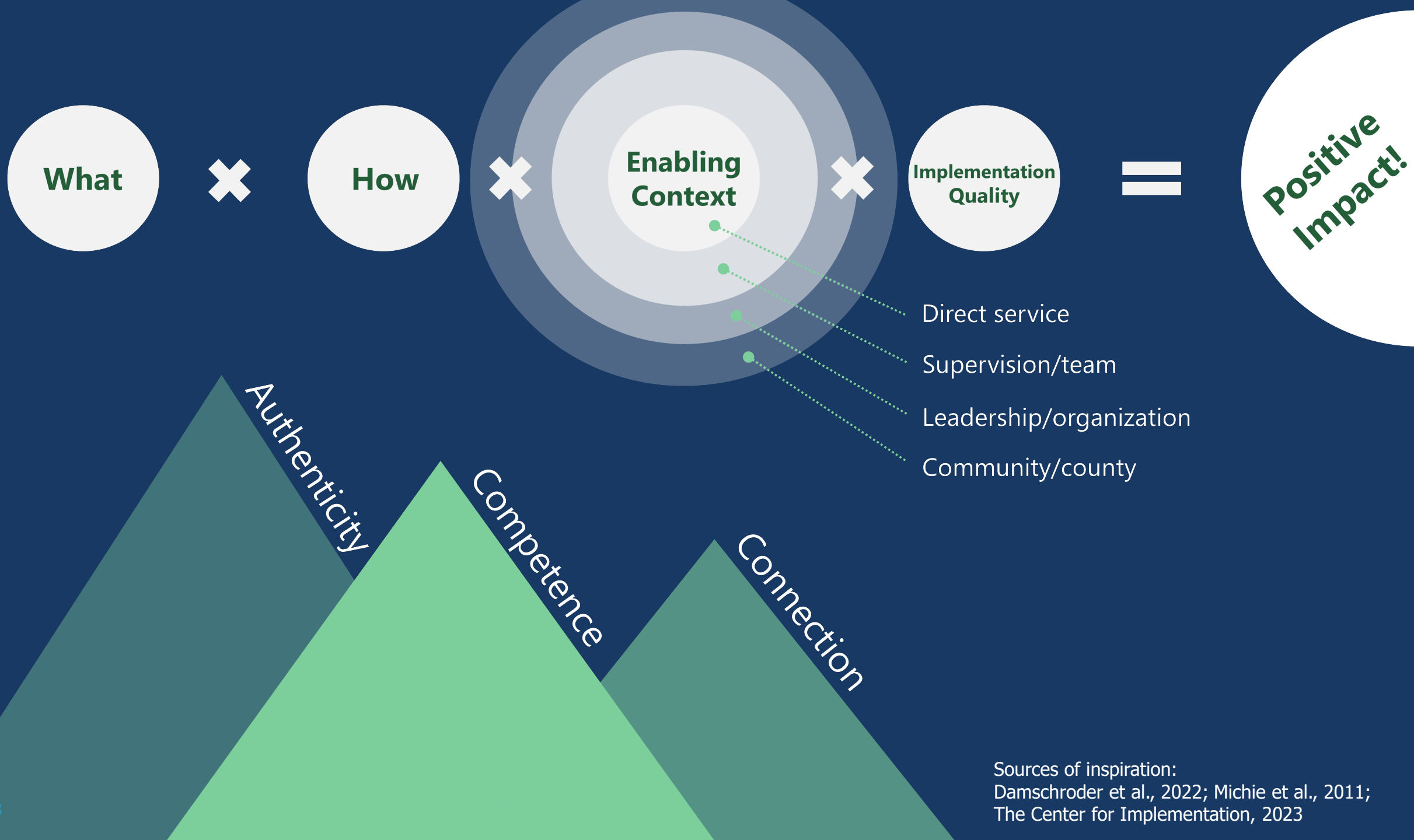
What we're hearing...

More training,
please.



What we're learning...

- **Trust** matters. Relationships matter. A lot.
- **Coaching** is the means to getting the coaching model to work.
- Local **leadership** is the “MVP” of implementation.
- Routine **self-reflection** and **skill practice** are missing at the direct service level.
- There appears to be **strong buy-in** and **consensus** around the vision for a cross-program coaching case management approach.



Sources of inspiration:
Damschroder et al., 2022; Michie et al., 2011;
The Center for Implementation, 2023

**What are you seeing with
case management in your
program?**

A way forward

- Clarify the “why” behind case management – what’s the goal?
 - Think beyond the **technical** aspects of case management – what is possible?
 - Think beyond **training** – what else is necessary for change?
 - ✓ Capabilities
 - Opportunities
 - Motivation
- Ingredients of behavior change**
- Source: Michie et al., 2011

Thank you! Stay in touch...

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