

Recording link: <https://contracosta.webex.com/contracosta/ldr.php?RCID=9f8c27125a489f2e4d0ee2dde310afa6>

Password: Ckgy6ncG

Case Management 101

Natalie Siva

Shelby Ferguson



please mute yourself

Housekeeping

Agenda

Introductions

See where you
are/Test your
knowledge

4 goals of case
management

Best Practices-
Models we use

Best Practices-
Models you use

Examples/Case
Studies- Break
outs!



Introduce Yourself in Chat!

Name, Agency, Role &
Favorite Ice Cream

The background features several concentric circles of varying radii, some solid and some dashed, creating a ripple effect. A blue callout box with a downward-pointing arrow is centered on the page. Inside the box, the text "See Where You Are" is written in white, bold, sans-serif font.

See Where You Are

Barriers

What gets in the way of doing your case management work?

- a) Trying to manage client's mental health/substance abuse issues instead of referring them
- b) Not knowing exactly what my job is
- c) Not knowing how to do my job/lack of training
- d) Getting too emotionally involved/struggle with boundaries
- e) All of the Above

**Does your case management job
look the way you expected?**

Answer in the chat!

How many
people are
currently on
your caseload?

Poll

- a) 1-10
- b) 10-20
- c) 20- 30
- d) 40 +

**How long are
your
sessions?**

How long, on average, are your case management sessions?

- a) 10 minutes
- b) 30 minutes
- c) 1 hour
- d) 2 hours

A stack of several books is shown on the right side of the image. The books have various colored spines, including light blue, red, and dark blue. A large blue speech bubble-like shape is overlaid on the left side of the image, containing white text. The background is a soft, out-of-focus teal and white gradient.

Test Your Knowledge!

Past trainings

Trauma- Informed Care

What are tips for having a Trauma Informed conversation with a case management client?

- a) Establish a relationship
- b) Be sensitive and slow down
- c) Be encouraging and empathetic
- d) Be flexible and responsive
- e) All of the above

Housing First

A program that is "Housing First" requires the following as part of the housing eligibility:

- a) Clients must be clean/sober
- b) Clients must have income or be able to increase their income
- c) No preconditions including; income, sobriety or mental health stability to attain housing
- d) Clients must be physically mobile/medically stable



Goals of Case Management

Natalie Siva



4 Goals of Case Management

Document readiness

Increase income

**Connection to benefits and
services**

**Connect to permanent
housing**

A photograph of a silver key and a green paper house cutout on a wooden surface. The key is positioned vertically on the left side, and the green paper house cutout is on the right side. A blue semi-transparent text box is overlaid in the center, containing the text "Housing Stability Plan".

Housing Stability Plan



Goal 1:
Document
Readiness

**Test your
Knowledge!**

Do you know how to help a client attain their housing documents? Click all that apply.

- 1) ID (identification card)
- 2) Social Security card
- 3) Birth certificate
- 4) Income verification
- 5) Disability certification

Document Readiness

- **Fee Waiver for IDs**
- **Social Security Office- Now open in person by appt only**
 - SS cards
 - Income Verification (SSI)
- **Income Verification-**
 - SSI- Make an account online (faster)
 - CalWORKS & GA- EHSD office
- **Birth Certificates**
 - Vital Records (fastest)
- **Disability Verification**
 - SSI award letter
 - Licensed Clinician



Goal 2:
Increasing
Income

Steps to Increasing Income

Budgeting



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graph TD; A[Budgeting] --> B[Increasing Income]; B --> C[Decreasing Expenses]; C --> D[Forecasting potential income];
```

Increasing Income

Decreasing Expenses

Forecasting potential income

Increasing Income & Budgeting

Your job is to help a client maximize their available income to pay for housing one of two ways.



By helping the program participant to increase their income



By helping the program participant to decrease their expenses

Budgeting

To know how much rent a person could currently pay, the first step is a preliminary, basic budget assessment:

- Current income: sources and amounts
- Current debts: amounts and monthly payments
- How much is currently available for housing?
- If that is not enough for housing, the gap is what you and the participant must seek to close.

Remember: Without a deep, permanent subsidy, most extremely low-income households will pay more than 50% of their income for housing.

Forecasting Income

Questions to ask:

- What did you do in your last job?
- Did you enjoy the work?
- What happened to that job?
- How long ago was that?
- Did you do other kinds of work?
- Is there something you'd be excited about doing?
- How do you feel about looking for a job?
- If I help you, would it feel better?

Increasing Income: Benefits

Connect them to benefits!:

- CalFresh (Food Stamps)
- General Assistance (GA)
- CalWORKS (TANF)
- WIC
- SSDI
- SSI
- Medicare
- Medi-CAL
- Employment

Increasing Income: Employment

Questions to Ask:

- What kinds of jobs that are and what do they pay?
- What is their projected income? Will that pay the rent?
- If they are on disability, how many hours can they work?
- Are there health risks associated with this person working?
- Do they need child-care in order to go to work?
- What about transportation to get to work?

Decreasing Expenses

Food Pantries

Clothing closets/consignment shops

Hot meals

Nonprofit/religious furniture donations

Big box stores that donate returns, excess merchandise

Car donations

Daycare vouchers

Bus passes

Problem-solving Intervention

**Test you
Knowledge!**

**How can you help increase
someone's income?**

- a) Budgeting
- b) Increasing Income
- c) Decreasing Expenses
- d) Forecasting Potential Income
- e) All of the Above



Goal 3:
Connection to
Benefits and
Services

Benefits and Services

Services

- Behavioral Health Services:
 - Alcohol and Other Drugs (**AOD**)
 - Mental Health
- Healthcare for the Homeless (**HCH**)
- Financial Assistance Services
- VA Benefits
- Legal Services
- Transportation
- In Home Supportive Services (**IHSS**)

Income Related

- SSI, SSDI, CalWORKS, CalFresh, GA

Combining Benefits and Earned Income



**COMBINING BENEFITS WITH
EARNED INCOME MIGHT BE
NECESSARY**



**KNOWING HOW/IF THESE CAN BE
COMBINED IS IMPORTANT**

Services- Mental Health

Behavioral Health Access Line

800-846-1652

- 1.HELP THE CLIENT CALL THE ACCESS LINE, SIT WITH THEM DURING THE PROCESS.
- 2.A COUNTY **MENTAL HEALTH CLINICAL STAFF MEMBER** WILL ASK THE CLIENT QUESTIONS TO ASSESS THEIR ELIGIBILITY FOR OUTPATIENT MENTAL HEALTH TREATMENT AT ONE OF THE COUNTY'S CLINICS.
- 3.DO YOUR BEST TO SUPPORT THE MENTAL HEALTH OF YOUR CLIENT AND ENHANCE THEIR MOTIVATION TO TAKE THE NEXT STEPS THEY NEED.
- 4.HELP GET YOUR CLIENTS TO AND FROM APPOINTMENTS IF NECESSARY.



Services-
Physical
Health

- ***West / East / Concord / CCRMC County Health Center***
 - Part of Contra Costa Health Services
 - Many clients often have appointments here and we can help them make app
- ***Health Care for the Homeless (HCH)***
 - Tuberculosis clearance (TB)
 - Connection to primary care
 - Mobile Clinics
 - Mobile Dental
 - PHN Referrals

Services- AOD

Behavioral Health Access Line **800-846-1652**

- 1.HELP THE CLIENT CALL THE ACCESS LINE, SIT WITH THEM DURING THE PROCESS.
- 2.A COUNTY **AOD STAFF MEMBER** WILL ASK THE CLIENT QUESTIONS TO ASSESS THEIR ELIGIBILITY FOR RESIDENTIAL (INPATIENT), OR DAY (OUTPATIENT) PROGRAMS.
- 3.YOU MAY BECOME A 'SOBRIETY CHEERLEADER' FOR YOUR CLIENT.
- 4.HELP CLIENT SEARCH FOR 12-STEP MEETINGS (AA/NA) GROUPS IN THE AREA.
- 5.HELP CLIENTS MAKE APPOINTMENTS TO DETOX IF APPLICABLE.

**What barriers do you find in
getting people connected to
benefits and services?**

Answer in the chat!

**See Where
You're At!**

What types of benefits and services do you know how to connect clients to? (check all that apply)

- CalFresh (Food Stamps)
- General Assistance (GA)
- CalWORKS (TANF)
- WIC
- SSDI
- SSI
- Medicare
- Medi-CAL
- Mental Health Services
- Recovery Services
- All of the above



Goal 4:
Connecting to
Permanent
Housing

**See Where
You Are!**

What is the most common barrier you see to getting your clients housed?

- a) Eviction
- b) Poor credit history
- c) Bad landlord reference
- d) No rental history
- e) Criminal history
- f) No income
- g) All of the above

Types of Housing

Temporary

- Bridge Housing
- Skilled Nursing Facility
- Board and Care
- Transitional Housing

Types of Housing

Permanent

- Rapid Rehousing*
- Shared Housing
- Sober Living Environments
- Permanent Supportive Housing
- Affordable Housing
- Vouchers
- Skilled Nursing Facility
- Board and Care

Connecting to Permanent Housing

- **Housing Navigation**
 - CORE, CARE, Shelters, TLPs
- **Coordinated Entry**
 - VI-SDPAT scores, length of time homeless

**Test your
Knowledge!**

Which one is NOT one of the 4 goals of case management?

- a) Addressing client interpersonal issues
- b) Increasing income
- c) Connecting to benefits and services
- d) Document readiness



Best Practices

Models

- **Progressive Engagement**
- **Trauma Informed Care**
 - <https://cchealth.org/h3/coc/pdf/2021-trauma-Informed-care-training.pdf>
- **Housing First**
 - <https://cchealth.org/h3/coc/partners.php#Training>
- **Harm Reduction**



What are your
Best
Practices?



Case Study

Case Study

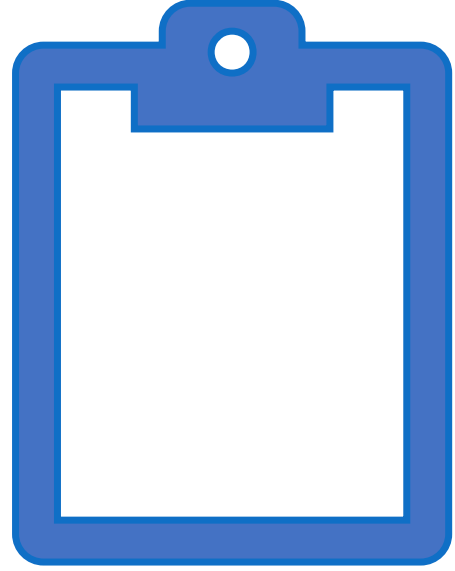
- You are working with a family, a mother and adult daughter. Mother and daughter appear to have a strained relationship and bring this to every interaction you have with them. Despite challenges, mother and daughter want to be housed together. Mother has no income and daughter has earned income. Mother is not document ready; daughter is. Mother has unaddressed medical and mental health needs and daughter is expressing concern regarding those needs.

Case Study: Break Groups

- You will be assigned to a breakout group
- Identify a note take/reporter to report out to the larger group
- You will have 10 minutes.
- Questions to answer:
 - What are the identified needs of this family?
 - Where might you connect them to?
 - What barriers do they have?
 - What might get in the way of your work?
 - What is not for you to solve?

A group of seven colorful wooden figures (red, yellow, orange, light wood, green, and pink) are arranged in a circle on a light-colored surface, holding hands with grey rope. A large blue speech bubble is overlaid in the center, containing the text "Group Report Out" in white. The background is a plain, light-colored wall.

Group Report Out



Survey!

Questions

Contact Natalie Siva:

nsiva@cchealth.org

HOUSING STABILITY PLAN

Date:

Head of Household Name:

Phone #

Create attainable goals to reduce or remove the impact of the housing barriers identified during assessment/reassessment. Define concrete action steps toward completion of each goal, including assistance you will need from your Case Manager or another outside source, and establish a target date for completion.

CLIENT'S CURRENT SITUATIONS IS FACTUALLY AS FOLLOWS:

Client has a monthly income of \$0000 from SOURCE(S). Client struggles with PHYSICAL, MENTAL HEALTH, SUDS Dx.

Client's needs are as or may be as follows:

- 1) Generate or Increase Income
- 2) Link to benefits or services
- 3) Attain housing documentation
- 4) Generate housing plan & complete

HOUSING STABILITY PLAN

Goal #1: Generate or Increase Income

Does client have sustaining income? Yes No

Action Steps Toward Goal	Who is responsible	Target Date	Date Completed	Notes/Progress
1.				
2.				
3.				
4.				

HOUSING STABILITY PLAN

Goal #2: Link to benefits or services

Action Steps Toward Goal	Who is responsible	Target Date	Date Completed	Notes/Progress
1.				
2.				
3.				
4.				

HOUSING STABILITY PLAN

Goal #3: Attain housing documentation

Action Steps Toward Goal	Who is responsible	Target Date	Date Completed	Notes/Progress
1.				
2.				
3.				
4.				

HOUSING STABILITY PLAN

Goal #4: Generate housing plan & complete *the goal is to find client sustainable, permanent housing.*

Action Steps Toward Goal	Who is responsible	Target Date	Date Completed	Notes/Progress
1.				
2.				
3.				
4.				

By signing below, I certify that I agree to work to achieve the above goals in order to progress toward long-term housing stability.

Head of Household Signature: _____

Date: _____

Client Name: _____

Budget

	Current		Future	Monthly	Annual
Income:					
Service connection				\$0.00	\$0.00
Employment		\$200.00		\$200.00	\$2,400.00
SSI/SSDI		\$900.00		\$900.00	\$10,800.00
Stipend				\$0.00	\$0.00
Total	\$0.00	\$1,100.00	\$0.00	\$1,100.00	\$13,200.00
Home Expenses:					
Rent/Mortgage				\$0.00	\$0.00
Rental Insurance				\$0.00	\$0.00
Other				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Transportation:					
Car Payments		\$350.00		\$350.00	\$4,200.00
License & Registration				\$0.00	\$0.00
Car Insurance				\$0.00	\$0.00
Fuel				\$0.00	\$0.00
Bus/Transit Pass				\$0.00	\$0.00
Other				\$0.00	\$0.00
Total	\$0.00	\$350.00	\$0.00	\$350.00	\$4,200.00
Utilities:					
Electric/gas				\$0.00	\$0.00
Cell Phones				\$0.00	\$0.00
Internet/cable/telephone				\$0.00	\$0.00
Water				\$0.00	\$0.00
Trash				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Medical:					
Health Insurance				\$0.00	\$0.00
Dental				\$0.00	\$0.00
Glasses & Contacts				\$0.00	\$0.00
Prescriptions				\$0.00	\$0.00
Other				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial:					
Bank Fees				\$0.00	\$0.00
Debt Repayment				\$0.00	\$0.00
Credit Card Repayment				\$0.00	\$0.00
Income Taxes Due				\$0.00	\$0.00
student loans				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Enjoyment:					
Travel				\$0.00	\$0.00

Movies/Netflix				\$0.00	\$0.00
Cigarettes				\$0.00	\$0.00
Pets				\$0.00	\$0.00
Hobbies				\$0.00	\$0.00
Restaurants/Fast Food				\$0.00	\$0.00
Other				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Routine Expenses:					
Groceries				\$0.00	\$0.00
Clothing				\$0.00	\$0.00
Toiletries				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Family:					
Childcare				\$0.00	\$0.00
Family Activities				\$0.00	\$0.00
School Costs				\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Income	\$0.00	\$1,100.00	\$0.00	\$1,100.00	\$13,200.00
Total Expenses	\$0.00	\$350.00	\$0.00	\$350.00	\$4,200.00
Difference	\$0.00	\$750.00	\$0.00	\$750.00	\$9,000.00

Cheat Sheet from CoC Training: Case Management

Updated 5.21.21

Service Center (510) 768-3100

217 Harbour Way, Richmond CA, 94820

- Immigration Legal Services
- Mental Health

Concord Service Center (510) 768-3100

2120 Diamond Blvd #220, Concord CA, 94820

- Housing
- Mental Health
- Immigration Legal Services

Bay Area Legal Aid CCC

Richmond Office (510) 233-9954

1025 Macdonald Ave, Richmond CA, 94801

Call to find out about their remote advocacy sites as well located in Antioch, Concord, and Pittsburg

Legal Advice Line 1(800) 551-5554 Main Line/ Contra Costa County West and East (510) 250-5270

- Housing
- Public Benefits
- Consumer Law

Monument Crisis Center (925) 825-7751

1990 Market Street, Concord CA, 94520

- Food distribution
- Youth Enrichment
- Resource and Referrals

<https://monumentcrisiscenter.org/get-help>

Numbers to the SSFV program:

Roads Home (located in Martinez) (925) 957-6042

Please have the client leave a message on this hotline and the Program Coordinator will return the call.

Shelter Inc veteran's intake line (located in Concord) (925) 957-7592

Both programs cover Contra Costa County.

Requirements: Must be a veteran experiencing homelessness or at risk of homelessness with any discharge other than dishonorable and at least 1 day of active duty.

Social Security (1-800) 772-1213

Antioch [2508 Verne Roberts Cir, Antioch, CA 94509](#)

Richmond [3164 Garrity Way, San Pablo, CA 94806](#)

Financial Counseling (925) 313-7750

Client can have a case worker help them with

HDAP (925)-381-7179

GA East County (925) 608-5980

4545 Delta Fair Boulevard

Antioch CA, 94509

GA Central County (925) 602-9379

400 Ellinwood Way

Pleasant Hill CA, 94523

GA West County (510) 942-3810

1305 Macdonald Ave

Richmond CA, 94801

DMV (1-800) 777-0133

El Cerrito [6400 Manila Ave, El Cerrito, CA 94530](#)

Pittsburg [1399 Buchanan Rd, Pittsburg, CA 94565](#)

CORE 211 (press 1 for English, then press 3 for CORE)

Veterans Service Office (appointment only)

Main Office (925) 313-1481 **Fax** (925) 313-1490 10 Douglas Dr #100 Martinez CA, 94553

Branch Office (510) 374-3241 **Fax** (510) 374-7955 100 37th St, Room 1033 Richmond CA, 94805

Berkeley Food and Housing Project (510) 649-4965

3225 Adeline Street Berkeley, CA 94703

Veteran Services Hotlines

1-888-479-1926 (Alameda County)

1-925-957-6042 (Contra Costa County)

Contra Costa County Employment and Human Services

<https://ehsd.org>

Great site for services with direct information pertaining to:

-Medical Coverage

-Food Assistance/CalFresh

-Child Care

-Cash Aid/CalWorks

-Elderly Services

-Apply For Services

CAPI

Call (800) 648-0954 regarding CAPI applications and processing

Cash Assistance Program for Immigrants applications are also taken at the GA offices listed above.

Just Shelter Community Resources Site

<https://justshelter.org/community-resources/>

Catholic Charities of East Bay

925-825-3099

[Contra Costa County Housing Intake | Catholic Charities East Bay \(cceb.org\)](#)

Seasons of Sharing

925-655-1205

925-3637293

Shelter Inc

925-338-1038

<https://forms.shelterinc.org/renthelp/rent-help-contracosta-county.html>

Veterans Assistance

925-957-7592

Bay Area Crisis Nursery

Great resources to help clients with kids

[Home - Bay Area Crisis Nursery](#)

The Translation Line

The translation line number is 925 313 8360, it will prompt you for the following: client ID 297301, cost center 5731

TRI- DELTA PARATRANSIT:

Service Areas: Bay Point, Pittsburg, Antioch, Brentwood, Discovery Bay

- Qualifications: Disabled (with physician signature on application) or a senior citizen
- Apply: https://trideltatransit.com/pdf/ADA_Paratransit_APP_Complete.pdf
- Holiday trips are only for qualifying seniors
- Payment: Cash or Ticket. Ticket applied for online or call (925) 680-2134 to be mailed
- Cost: lowest cost is \$2.75
- Reservations can be made 1-3 days in advance
- Will transport clients anywhere they need to go with reservation
- Scheduler number is also (925) 680-2134
- If client needs to travel outside of serviced cities, the scheduler will help them schedule a "One-Seat-Regional-Transfer" EX: Client in Bay Point needs to go to Walnut Creek, the scheduler will arrange and schedule their transfers
- Latest pick up/drop off is around mid-night, as long as the trip qualifies (around ¾ miles from destination), the scheduler will help with this as well

EAST BAY PARATRANSIT:

Service Areas: Pinole, El Sobrante, San Pablo, Richmond, El Cerrito, Albany, Kensington, Berkeley, Orinda, Emeryville, Oakland, Piedmont, San Leandro, Castro Valley, Pleasanton, Dublin, Hayward, Union City, Newark, Fremont, SOME Concord areas, and San Francisco

- Mostly for clients who are disabled
- Application on their website: [EBPADAAppInterviewProcess.pdf \(eastbayparatransit.org\)](#)
- Followed by a phone interview 510-287-500
- Scheduler will assist in "One-Seat-Regional-Transfer" as well
- Scheduler number is (510) 287-5000
- Will take clients wherever they need
- Payment: Cash or ticket. Call scheduler to mail ticket or apply online
- Cost: around \$6-\$9

Community Connect

[Whole Person Care CommunityConnect :: Public Health :: Contra Costa Health Services \(cchealth.org\)](#)

Basic information can be found here. If clients don't have community connect they can call this number or send an email for an assessment. CommunityConnect@cchealth.org or 925-608-5100

Putnam Clubhouse

Good resources to have

[Programs \(putnamclubhouse.org\)](#)

COVID Rent Relief Program

[Community Housing Development Corporation of North Richmond](#) 510-215-2515

[Northern California Land Trust](#) 510-548-7878

[Richmond Neighborhood Housing Services, Inc. dba](#) 510-334-7750

[Neighborhood Housing Services of the East Bay](#) 510-334-7750

[SHELTER, Inc.](#) 925-349-0571

BAY AREA RESCUE MISSION (BARM):

Men's Shelter

200 Macdonald Avenue
Richmond, CA 94801

Women's Shelter

Next door to men's, White Gate
510-215-4860

Administration Offices

2114 Macdonald Avenue
Richmond, CA 94801
Phone (510) 215-4873

The FCC Emergency Broadband Benefit

will provide a discount of up to \$50 per month towards broadband service for eligible households and up to \$75 per month for households on qualifying Tribal lands. Eligible households can also receive a one-time discount of up to \$100 to purchase a laptop, desktop computer, or tablet from participating providers if they contribute more than \$10 and less than \$50 toward the purchase price.

The Emergency Broadband Benefit is limited to one monthly service discount and one device discount per household.

Who Is Eligible for the Emergency Broadband Benefit Program?

A household is eligible if a member of the household meets one of the criteria below:

- Has an income that is at or below 135% of the *Federal Poverty Guidelines* or participates in certain assistance programs, such as SNAP, Medicaid, or *Lifeline*;
- Approved to receive benefits under the free and reduced-price school lunch program or the school breakfast program, including through the USDA Community Eligibility Provision in the 2019-2020 or 2020-2021 school year;
- Received a Federal Pell Grant during the current award year;
- Experienced a substantial loss of income due to job loss or furlough since February 29, 2020 and the household had a total income in 2020 at or below \$99,000 for single filers and \$198,000 for joint filers; or
- Meets the eligibility criteria for a participating provider's existing low-income or COVID-19 program.

To find out more go to: <https://www.fcc.gov/broadbandbenefit>