



## **Participant Centered Group Session Guide**

**Final Session Title:** Local Agency Caseload In-service

### **Session Focus**

**Target Audience:** Local agency staff

**Session Goal:** Enhance local agency ability to achieve and maintain assigned caseload levels for their agency.

#### **Key Content Points:**

- Point 1: Discuss caseload management characteristics.
- Point 2: Review caseload management strategies.
- Point 3: Set action steps to reach caseload goals.

#### **Session Objectives:**

- Objective 1: Establish local agency caseload goal.
- Objective 2: Define basics of caseload management.
- Objective 3: Identify actions to implement for reaching caseload goals.

### **Session Planning**

**Location Considerations:** Adequate space for attendance by all local agency staff.

#### **Materials Needed:**

- Local agency caseload reports from past month
- Power point presentation and /or copies of slides
- Laptop and LCD projector if using power point
- Outreach handouts and planning document
- Flip chart and markers or dry erase board and markers



**Preparation Needed:**

- Run caseload reports
- Update power point slides to reflect local agency characteristics

**Time Needed:** 3 hours (can be expanded or contracted to fill time allotment)

**Facilitator Considerations or Expertise Needed:** Skilled group facilitator, caseload management experience

### Session Outline

**Facilitator notes:** Observe dynamics of the group. Work toward buy-in on the need for caseload improvement before moving on to brainstorming around issues and solutions.

Time	Learning activity	Objective covered
15 min	<b>Opening the session:</b> Introductions. Acknowledge invitation to join their caseload conversation. Share facilitator background and caseload management experience. What experience has this group had in working on caseload management activities together? Present in-service objectives.	
15 min	<b>Warm-up activity:</b> Group discussion <ul style="list-style-type: none"><li>• Recognize that caseload management is a complex topic. Helpful to be clear about targets. What outcome would you like to see from this meeting? What would make you feel that this was a successful use of your time today? Establish goal for the session first than address overall caseload goal. Document and post for reference during session.</li></ul>	1



Time	Learning activity	Objective covered
15 min	<p><b>Activity 1:Goal setting</b></p> <ul style="list-style-type: none"> <li>• <b>Why do we care about caseload?</b> Review caseload impact on funding. Importance of serving as many families as possible.</li> <li>• <b>Establish caseload goal for the agency.</b> Include “who” will be involved, by “when” this will happen (timeline) along with the “what”. (Note that the “how” to do this will be discussed next) Example: All staff from the XYZ agency will work together to achieve 100% of their assigned caseload within three months (can add the “why” if important to the group, ie: in order to serve as many families as possible and retain stable funding). Document and post goal for reference during session.</li> <li>• <b>Discuss team aspect of caseload management.</b> Who has responsibility for caseload management? How do the tasks that you do each day affect caseload? Everything that every WIC staff routinely do everyday impacts caseload. Examples: certification and 2<sup>nd</sup> NE by certifiers, scheduling and phone calls by clerical, outreach and planning by coordinator, etc.</li> <li>• <b>Review caseload definitions: assigned, certified, participating</b></li> </ul>	1, 2
15 min	<p><b>Activity 2:Caseload reports review</b></p> <ul style="list-style-type: none"> <li>• <b>Overview of Oregon Caseload data</b></li> <li>• <b>Overview of available TWIST reports</b></li> <li>• <b>Review caseload data from TWIST reports for the agency:</b> participating caseload, percent of assigned caseload, percentage not receiving vouchers, WIC counts by category and priority for each clinic site, show rates</li> <li>• <b>What is your reaction to this data? Where are the areas of concern? Areas of strength?</b></li> </ul>	2



Time	Learning activity	Objective covered
45 min	<p><b>Activity 3:</b> Discuss issues affecting agency caseload</p> <ul style="list-style-type: none"> <li>• <b>Accessibility:</b> What does this mean to you? Where are the challenges with accessible services in your area? How easy is it to get an appointment? How easy is it to connect with the program by phone? When and where are appointments available? Document responses on flip chart or white board.</li> <li>• <b>Retention:</b> How would you define this term? What might impact show rates for different appointment types in your agency? For different clinic sites? How are participant centered services demonstrated in your agency? What types of communication are used with participants? How successful is the communication around appointment scheduling? Document responses on flip chart or white board.</li> </ul>	2,3
45 min	<p><b>Activity 4:</b> Brainstorm actions steps</p> <ul style="list-style-type: none"> <li>• <b>Accessibility:</b> How can more appointments be made available? How can staff time be used more effectively? What outreach is needed? Document responses.</li> <li>• <b>Retention:</b> What actions will help to retain participants? How do we improve show rates? What variety of options is available for second NE contacts? How could communication with participants be enhanced? How can participant centered services be supported? Document responses.</li> </ul>	3
15 min	<p><b>Activity 5:</b> Identify next steps</p> <ul style="list-style-type: none"> <li>• Select and Prioritize strategies to work on</li> <li>• Clarify implementation plan (who will do what where and when)</li> <li>• Assess progress, evaluate and adjust as needed, follow up at future meetings</li> <li>• Address ongoing activities to assure caseload maintenance once goals are reached</li> </ul>	3
15 min	<p><b>Closing the session:</b> Summarize. Express confidence in ability to succeed... then Celebrate!</p>	

**Facilitator review: What follow up will be useful for this agency?**

