

Partnering for Possibility: Whole Family Case Management in W-2

Purpose

Develop Whole Family Case Management and coaching skills to use when working with families in the W-2 program.

Objectives

Upon completion of this course, you will be able to:

- Acknowledge the impact of your mindset on the families you serve.
 - Describe tools and strategies used to help families reach their outcomes.
 - Review how family outcomes inform case management decisions.
 - Summarize your role in service coordination in Whole Family Case Management.
-

Table of Contents

MINDSET	4
Fixed vs. Growth Mindset.....	4
The Importance of Mindset	5
FAMILY-CENTERED COACHING	8
Family Centered Values.....	9
Family Centered Coaching Principles.....	9
Family Dynamics	11
Who Is in My Family?	12
Family Needs Assessment.....	17
Informal Assessment Driver Flow	17
The Wheel of Life.....	17
Self-Sufficiency Matrix	20
ROLE OF SERVICE COORDINATION	22
Service Coordination and Assessment.....	23
Transfer of Accountability.....	23
Not a Linear Process	23
Referral Process and Making Connections.....	25
Your Local Resources.....	26
Referrals and Connections	27
REVIEW OUTCOMES AND MONITOR PROGRESS.....	28
Plan-Do-Review	29
REFERENCES	32
APPENDIX	33
Appendix A – Coaching Tools.....	34
Ready to Coach Checklist.....	34
Everyday Strategies for Working with Families	35
Family Focused Powerful Questions	36

W-2 Contact Information

Questions regarding this training material should be directed via your local agency process to the Partner Training Team,

Email: PTTTrainingSupp@wisconsin.gov

A contact person is available to answer e-mailed questions related to this training material, assist you in completing any activity that you are having difficulty with, and/or provide explanation of anything else about this training material.

Questions regarding W-2 production cases and systems should be directed via your local agency process to the BWF Work Programs Help Desk at:

Email: bwfworkprogramshd@wisconsin.gov

Telephone: (608) 422-7900.

W-2 Policy questions should be directed to your Regional Office staff.

DCF is an equal opportunity employer and service provider. If you have a disability and need information in an alternate format, or need it translated to another language, please contact (608) 535-3665 or the Wisconsin Relay Service (WRS) – 711.

For civil rights questions call (608) 422-6889 or the Wisconsin Relay Service (WRS) – 711.

Mindset

Fixed vs. Growth Mindset

1. You can do things differently, but the important parts of who you are can't really be changed.

AGREE DISAGREE

2. No matter how much intelligence you have, you can always change it quite a bit.

AGREE DISAGREE

3. You can always change basic things about the kind of person you are.

AGREE DISAGREE

4. You can learn new things, but you can't really change how intelligent you are.

AGREE DISAGREE

Discussion Questions

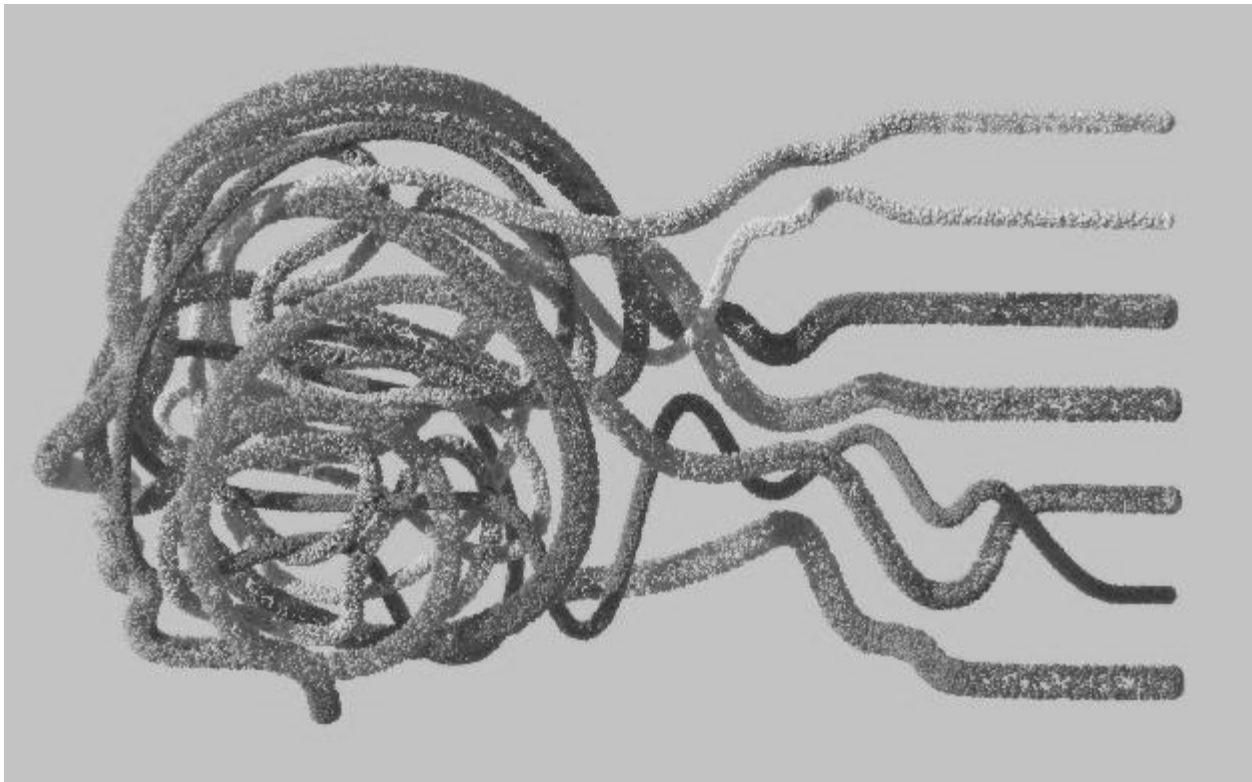
1. What caused that change in mindset?
2. Was there a specific moment, experience, or person that influenced your thinking?
3. How did that change impact the way you interact with others?

The Importance of Mindset

Your _____ is how you feel about something.

Your _____ are the ideas you accept as true.

Your _____ are the deeply held principles that guide your choices and priorities.



The Fixing Mindset:

- Prefers to be in the driver's seat of the appointment
- Assumes the participant has a problem I must solve
- Views myself as the expert
- Tells the parent what to do
- Focuses on what I think the parent's goals should be
- Makes judgmental remarks
- Talks only about what I think we should discuss
- Distracted listening
- Convinces the participant to agree with me
- Offers unsolicited suggestions

The Coaching Mindset:

- Goal driven, participant-centered, strength-based
- Believes that families are capable, creative, and resourceful
- Views the parent as the expert in their life
- Asks powerful questions
- Focuses on what the parent wants to achieve
- Provides positive feedback and acknowledgement
- Encourages the participant to lead the conversation
- Actively listening
- Respects the participant's choices
- Asks permission

How to create a coaching mindset environment:

- Present skills as _____
- _____ learning and perseverance, not just talent
- Give _____ in a way that promotes learning
- Be a _____ for learning

Flip the Script

Re-write the fixing statements as coaching responses.

1. You should really follow up with that employer before the end of the week.
2. You have to come to your appointments if you want to stay in the program.
3. I'll sign you up for the training program. It's your best option.
4. You need to work on your time management if you want to keep this job.
5. Wisconsin Shares will really help you out. I have the website up on my computer. I'll help you fill out the application right now.
6. You need to get your GED before you can do anything else.

Family-Centered Coaching

Family-Centered Coaching is future-focused, strengths-based, and parent-led.

Key features of coaching:

The heart of Family-Centered Coaching is partnership.

The Parent's Role	The Coach's Role

Family Centered Values

1. **Full-Family Focus:** You're not just helping the parent, you're _____ the whole family.
2. **Family-Led:** Families _____ what is most important to them based on their situation.
3. **Respect:** Every family has _____ and _____ based on their life experience.
4. **Strengths-Based:** Every family has _____, even when they're struggling.
5. **Racial Equity and Inclusion:** Recognize that families are affected by things _____, like racism, poverty, and unfair systems.

Family Centered Coaching Principles

1. **Fluid Approach:** Stay _____.
2. **Transparency:** Be _____ and _____ about your role, the process, and what support you can offer.
3. **Collaboration:** You don't do things for families, you work _____ them
4. **Choice:** Offer _____, not orders.
5. **Responsiveness:** _____ families where they are.

Coaching Phrases

Full-Family Focus:

Family-Led:

Respect:

Strengths-Based:

Racial Equity and Inclusion:

Fluid Approach:

Transparency:

Collaboration:

Choice:

Responsiveness:

How can these values and principles show up in your work, especially when time is short or families are in crisis?

What's one coaching phrase you heard today that you'd like to try using?

Family Dynamics

Circle which statement connects with you.

Every family's dynamic is one of a kind.

No two families function the same way.

Family relationships are shaped uniquely.

Family dynamics vary just as much as the families themselves.

How families relate is uniquely tailored to their members.

Each family's way of connecting is unique.

Who Is in My Family?

<https://familycenteredcoaching.org/coaching-toolkit/who-is-in-my-family/>

Families can include anyone who plays an important role in your life. Your family can include family members like children, aunts, uncles, cousins, and grandparents, people you live or parent with, close friends, neighbors, or any other person who is considered a part of the family. There is no right or wrong way to define family, and who is in your family may change over time.

1. Write the name of each person who plays an important role in your family.
 - Think about your children, parents, grandparents, aunts, and uncles, as well as friends, partners, or neighbors that you consider family.
2. Draw a solid or dotted line to the names of the people who provide support to you.
 - Draw a solid line to the names of the people who rely on you for support.
 - Draw a circle around the names of people who provide support to you.
 - Draw a dashed line to the names of the people who are important to you, but are not involved in your day-to-day life.



Questions to ponder while completing your family diagram:

- Who do you consider to be part of your family?
- Who helps you on a day-to-day basis? For example, family members, friends, or neighbors who provide childcare, transportation, and emotional support.
- Who plays a role in taking care of your home life?

Create your own Who Is in My Family diagram.



Discussion questions

What did you notice about who you consider part of your family?

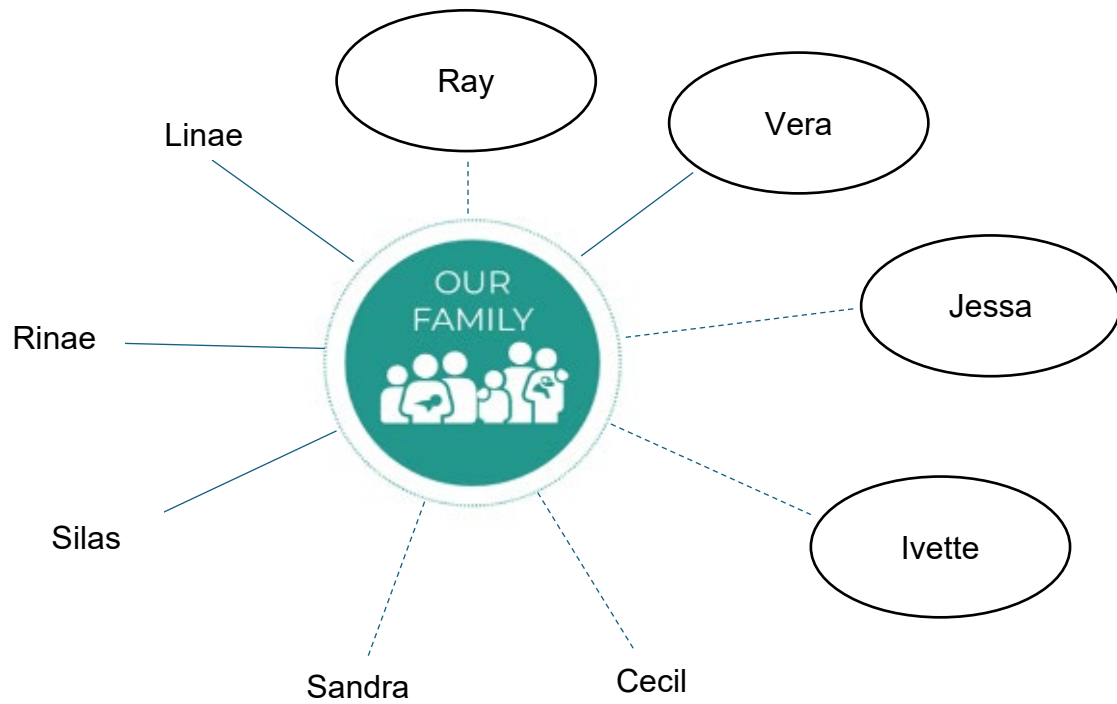
Did anything surprise you? If yes, what was that?

Case Scenario Jinae

Jinae is a single mother of three children, a son Silas, age 12, and twin daughters Rinae and Linae, age 4. She has identified who she includes in her family and completed the diagram on the next page. Either these individuals either have influence over Jinae, or she has influence on them.

- **Silas**, her 12-year-old son, has a strong personality as protector of his family, as he is the oldest male in his home. He has had some run-ins with law enforcement, mainly over curfew violations and hanging with an older group of young men.
- **Linae and Rinae**, her 4-year-old twin daughters, are active and rambunctious girls who have a high level of energy. They love their day care providers who match their energy and provide Jinae with parenting tips and tricks for parenting twins. Jen, their case manager with HeadStart, reinforces parenting technique from the day care teachers and has been a sounding board for Jinae.
- **Vera**, Jinae's mother, has always been Jinae's safety net and biggest critic. She willingly points out Jinae's shortcomings, and always is willing to lend a hand with her children when needed. Also, Vera is beginning to have some physical limitations due to her age and health decline.
- **Jessa**, Jinae's sister, is not the most dependable person in Jinae's life; however, she has been there to play, entertain and distract her children.
- **Ray**, Jinae's boyfriend, brings her a lot of joy and acts as shelter from some of the chaos in her life. Jinae leans on him and wants him to be a part of her family, but does not want to be hurt by Ray. At times she pushes him away, saying her life is too busy and crazy.
- **Ivette**, Jinae's best friend for over 30 years, has been there for Jinae for all the highs and lows in her life. She hasn't always been the best influence in her life but always is there for her.
- **Cecil**, Jinae's neighbor, provides some fatherly guidance to Jinae when she is open to receive it. He has tried to connect with Silas.
- **Sandra**, Jinae's aunt and Vera's sister, is like a second mother to Jinae. She helped raise Jinae while her mother, Vera, worked.

Jinae's Family Diagram



The following individuals also interact with Jinae's family. Jinae may consider them part of her family at times, as family dynamics are fluid and change. Use this information to answer the second discussion question.

- **Ric**, Silas' father, is in and out of their lives. When things are going good for him, he disappears and resurfaces when he is down on his luck. When he does show up, he usually needs something and only says hello to Silas.
- **Travis**, Linae and Rinae's father, usually take the twins every other weekend unless he must work. He has taken them, and then had his mother watch them for him.
- **Officer Kevin**, with the City Police Department, is assigned to the designated Healthy Neighborhood that Jinae lives in. He tries to connect with Silas and be a person Silas feels comfortable talking to, as Silas has engaged in risky behaviors.
- **Jen**, HeadStart case manager, is the person who has regular contact with the family and the teachers of the twins at the HeadStart Program. Jen is extremely overworked, her heart is in the right place; however, she doesn't always follow through on things.
- **Elizabeth and Ellen**, daycare providers for the twins, are the lead teachers in the twins' classroom at daycare. The twins love them and always seem to be on their best behavior in their presence.
- **Pastor Christine** at Jinae's place of faith – she attends regularly with her family and volunteers as she is able. Her pastor has been a good listener/counselor to her when she has gone to them with problems and has been a confidant to Jinae ever since she had her twin daughters and their father left.

Discussion questions:

1. What impact or influence do individuals who Jinae identified as part of her family have on her?
2. How might changes to Jinae's family structure (e.g., family members leaving or joining) impact her? Review the additional people who Jinae may include in her family at various times and how each might impact or influence Jinae.

Family Needs Assessment

Informal Assessment Driver Flow

What pages in the WWP Informal Assessment Driver Flow give you a better understanding of the family's situation?

What information do these pages provide that give you insight into the whole family?

The Wheel of Life

<https://familycenteredcoaching.org/coaching-toolkit/the-wheel-of-life/>

The Wheel of Life explores the family's overall well-being, assists the family to prioritize areas of life that they want to work on, and helps set initial goals.

Health and Well-Being

Child Well-Being and Parenting

Family, Friends, Relationships

Basic Needs: Food, Housing, Transportation, Safety

Employment, Education, Career

Finances

Legal

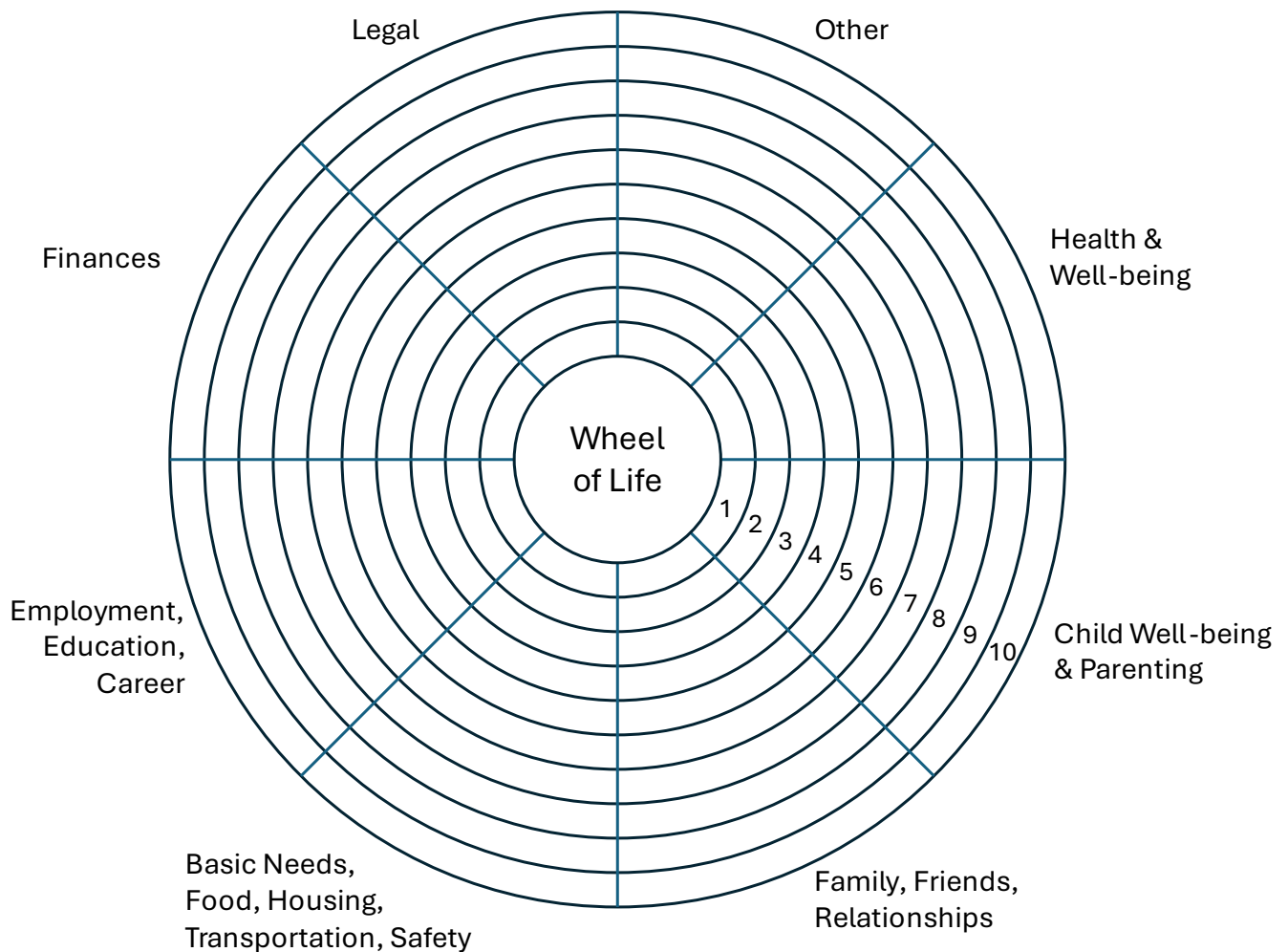
Other

The Wheel of Life

The Wheel of Life is a way to look at different parts of life. We want to celebrate what is going well and see where we want to make changes. We'll come back to this image so we can see our progress along the way.

Directions:

1. Review the different parts of life on the wheel.
2. How satisfied are you with this part of your life? Give each part of the wheel a score from 1-10. 1 means very unsatisfied and 10 means very satisfied.
3. Shade in your wheel based on your scores.
4. Reflect on the Wheel of Life questions.



Looking at your Wheel of Life, consider:

What are your 3 highest scores?

What is working well in this part of your life?

How long has it been this number?

What strengths do you and your family have in this area?

What are the 2-3 parts of your Wheel of Life you would like to improve?

What number would you like to get to?

How will you know when you have reached your goal in this part of your wheel?

Take a moment to imagine your goal. What does it look like, feel like? What would be different? What would it feel like for your family?

What would a level 10 look like in this part of your wheel?

Who might be able to help?

What are your Top 3 priority areas?

What are some opportunities to start moving toward your goal in each area?

Self-Sufficiency Matrix

The Arizona Self-Sufficiency Matrix is an assessment and outcome measurement tool that measures categories of well-being. The matrix can:

- help you document a family's progress toward self-sufficiency,
- help parents and families to determine their own areas of strength, and
- help your agency to assess the effectiveness of services being offered and how best to direct resources to families.

Annika's Story

Annika is a 26-year-old parent of two children: Kenon, age 5, and Becca, age 1. They recently joined the W-2 program for financial help while Annika looks for work. The family is connected with the Income Maintenance (IM) agency and receives BadgerCare and FoodShare. Annika mentions that they currently are staying with her mother, but cannot stay there too much longer, as Annika and her family aren't on the lease. You ask Annika to complete the Self-Sufficiency Matrix to understand her and her family's situation.

1. What does this information tell you about Annika's areas of strength? Where might she need support?
2. How might you use this information?
3. What are possible next steps?

Annika's Matrix

Domain	1 (In Crisis)	2 (Vulnerable)	3 (Safe)	4 (Building Capacity)	5 (Thriving)
Food	I/we or my family do not have enough food to last today and we do not have enough money to buy food.	I/we regularly miss a meal because of a lack of money to buy food.	I/we get enough food to help to meet our food needs. ✓	I/we can provide three meals a day from our income.	I/we are able to buy the food we need without food stamps or other people's help, and we can eat out when we choose to do so.
Housing	I/we have no place to stay, or have an eviction or utility shut off notice.	I/we do not have a permanent place or temporary stay with others, and often must move to a different place or I/we are living in an unsafe home. ✓	I/we are renting a home with the help of either temporary or permanent assistance.	I/we are in rental housing that is safe and affordable with no rental assistance.	I/we own or are buying a safe home or renting a home of my/our choice.
Employment/Income	I/we are not and not receiving unemployment benefits or have disabilities that interfere with ability to gain employment.	I/we are seeking employment and or working part-time or have 2 or more jobs or receiving SSI. ✓	I/we are living on a fixed income or under employed or employed without benefits.	I/we are employed 32+ hours a week with limited benefits.	I/we are employed 32+hours a week with benefits and opportunities for advancement.
Mental Health	Danger to self or others; suicidal thoughts; experiencing severe difficulty in day-to-day life due to psychological problems.	Recurrent mental health symptoms that may affect behavior, but not a danger to self/others; persistent problems with functioning due to mental health symptoms.	Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems. ✓	Minimal symptoms that are expected responses to life stressors; only slight impairment in functioning.	Symptoms are absent or rare; good or superior functioning in wide range of activities; no more than everyday problems or concerns.
Physical Health	Acute or chronic symptoms affecting housing, employment, social interactions, etc.	Sometimes or periodically has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Rarely has acute or chronic symptoms affecting housing, employment, social interactions, etc.	Asymptomatic; condition controlled by services and/or medication	No identified disability. ✓

Adapted from Newcap's self-sufficiency matrix.

¹ The Arizona Self-Sufficiency Matrix (ASSM) was developed by the Arizona Department of Economic Security. The design process involved collaboration among various stakeholders, including state agencies, social service providers, and community organizations. The goal was to create a comprehensive tool that assesses multiple dimensions of self-sufficiency for low-income families and individuals.

Role of Service Coordination



Notes:

Service Coordination and Assessment

The services you coordinate for families must be based on what you've learned during assessment.



When you complete an assessment, how do you decide which services or referrals to focus on first?

Transfer of Accountability

Not a Linear Process

Signs a family is ready for more ownership in the transfer of accountability process:

- _____ on small tasks
- Showing more - _____
- Naming their own _____
- Expressing _____ on reminders or direction

Levels of Support

What level of support would you offer in each situation: High, Medium, or Low? Why?

Scenario 1: A parent just secured housing after a period of homelessness. They are not sure how to set up utilities or arrange renter's insurance.

Scenario 2: A parent applied for three jobs this week, followed up on one of them, and now has an interview scheduled for next week.

Scenario 3: A parent wants to enroll their child in Head Start, but they are confused by the application process.

Referral Process and Making Connections

What are some of the community focused organizations in your service area?

Key Supports

___1. Integrated Collaboration

___2. Community Connections

___3. Community Education

___4. Combining Financial Resources

___5. Resource Banks

___6. Collaboration & Partnerships

___7. Staffings

Summary

A. W-2 staff and other organizations having strategic discussions and coordinating services/resources.

B. Breaking down silos to collaborate across different sectors to offer more complete solutions.

C. A centralized place where families can access community resources and services.

D. Using money from different sources to create a more flexible and effective support system.

E. Providing everyone with information about available resources and how they work together.

F. Social connections and support networks that lead to more effective and lasting solutions for families.

G. Bringing together various community resources to support individuals and families.

Your Local Resources

What are the needs of the parents in W-2? Do you remember this activity from the webinar Building Stronger Families Together? You were challenged to identify resources for these needs of the parents in W-2.

Knowing Information Beyond 2-1-1

Housing/Shelter	Clothing	Food
Domestic Violence/ Sexual Assault Resources	Language/Interpreters	Literacy
Transportation	Child Care	Homework Help
Substance Use	Support Groups	Child Development
Health/Dental	Employment	Household Supplies
Youth Services	Legal Services	Previously Incarcerated
Tax Assistance	Veteran Services	Aging/Disability Resources
Utilities	Education	Hotlines/Helplines
Income Assistance	Law Enforcement	Mental Health

Referrals and Connections

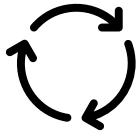
1. How do W-2 workers learn about other community programs, agencies, and processes? This includes referrals, applications, ongoing services, and ending services.

2. How do you share this information with parents? Is it a once and done, or do you revisit it? Do you follow up?

3. How does, or how could your W-2 agency create opportunities for parents to access/find out about resources?

4. Are there other agencies in your community that take the lead on getting information about resources out to families?

Review Outcomes and Monitor Progress







Plan-Do-Review

<https://familycenteredcoaching.org/coaching-toolkit/plan-do-review/>

First, identify your big goal, also known as a milestone, and then use the tool that follows to plan for each small goal to get to your milestone.

Major Milestone:

What are you trying to improve, and how will it benefit your family?

What is the first goal under this milestone?

What are the small steps toward your goal? Keep the steps small so they are manageable and you can make progress.

For each step you need to reach the goal, use a separate Plan-Do-Review sheet, on the following page.

Step 1	
Step 2	
Step 3	
Step 4	

Plan-Do-Review Sheet

Step# _____

Plan:

What actions will you take? What role will family members play? Who will do it (include family members)? When will they do it? Where will they do it?

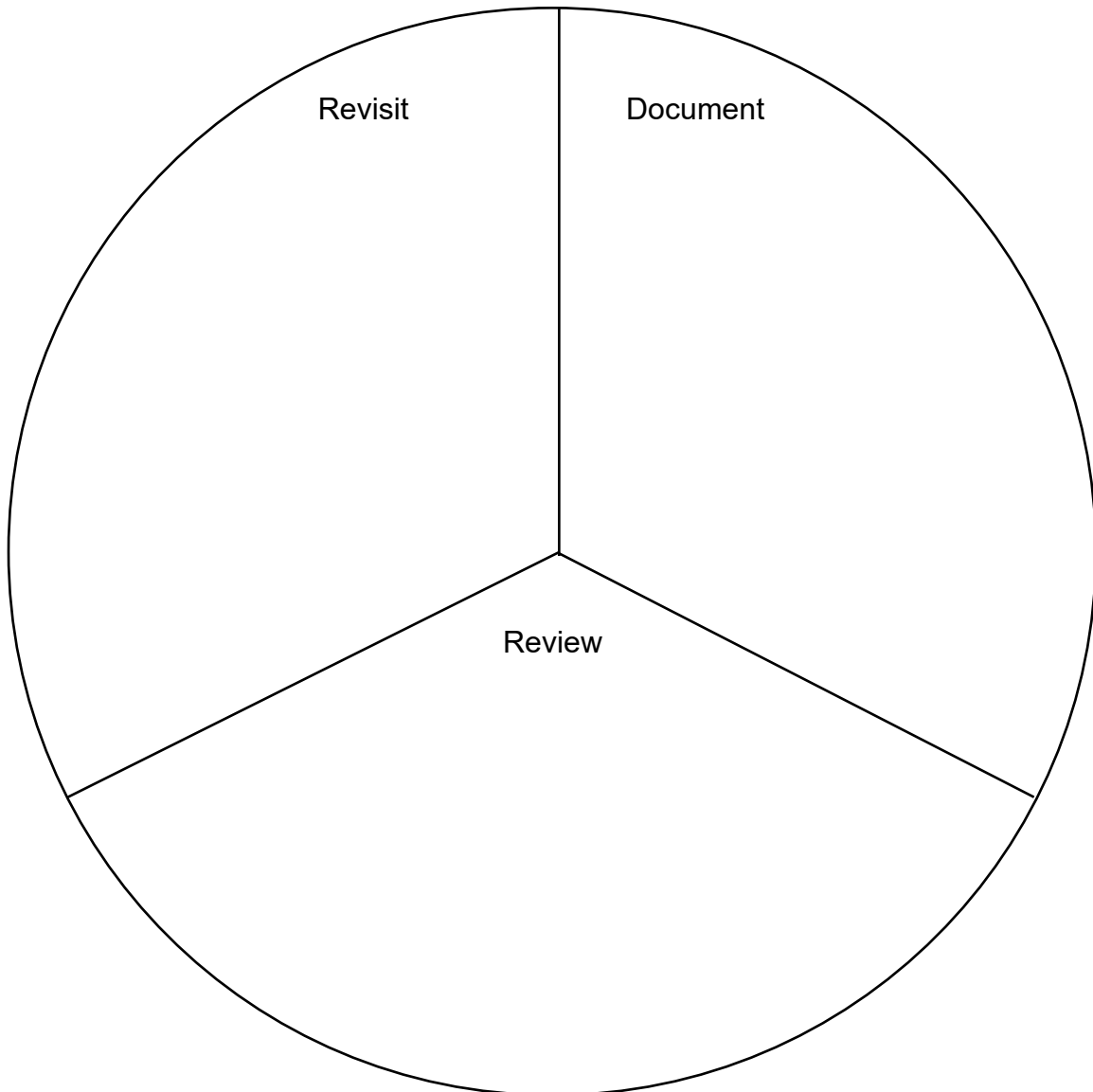
Do:

The participant and their family implement the plan and carry out actions.

Review:

How did it go? Did things happen according to the plan? How did the plan work for your family? What was successful? Were there any unexpected outcomes? How did the plan impact the family? Did you add or miss any action steps? Did things happen on time?

- ☐ Yes Celebrate and continue the plan. Continue to check and adjust as needed.
- ☐ No What changes do you need to make? What will you do next to keep the plan on track?



References

Dweck, C.S. (2006). *Mindset: The new psychology of success*. New York. Ballantine Books.

Tools. (n.d.). Family Centered Coaching. <https://familycenteredcoaching.org/tools/>

Appendix

Appendix A – Coaching Tools

Ready to Coach Checklist

<https://familycenteredcoaching.org/coaching-toolkit/ready-to-coach-checklist/>

Family-Centered Coaching

READY TO COACH CHECKLIST

In less than five minutes, you can prepare yourself and your space to fully engage and partner with participants.

HOW CAN I PREPARE MY SPACE?

- ☐ Turn off your electronics, silence your cell and desk phone.
- ☐ Clear away any clutter in the room and on your desk.
- ☐ Create a comfortable place for the participant to sit.
- ☐ _____
- ☐ _____

HOW CAN I GET INTO A FAMILY-CENTERED MINDSET?

- ☐ Take three deep breaths in and out.
- ☐ Think of two strengths you bring to the coaching session and two strengths the participant brings.
- ☐ Identify a phrase to support you such as, "I am ready to enter into an equal partnership with this participant," or "The participant is the expert and the coach guides the process."
- ☐ Spend a minute in self-reflection to explore whether you have any hidden biases (e.g., race, gender, or class stereotypes) that may impact the coaching conversation.
- ☐ _____
- ☐ _____

HOW CAN I FOLLOW THROUGH?

- ☐ Take three deep breaths in and out.
- ☐ What do you need to follow up on?
- ☐ What was the best moment during the session?
- ☐ What coaching skills were helpful in this session?
- ☐ _____
- ☐ _____

FOR COACHES

Date revised: 9-15-19 | Version 1.0

www.FamilyCenteredCoaching.com

Everyday Strategies for Working with Families

<https://familycenteredcoaching.org/coaching-toolkit/everyday-strategies/>

Family-Centered Coaching

EVERYDAY STRATEGIES FOR WORKING WITH FAMILIES

Based on promising practices from behavioral economics, trauma-informed care, and executive skills building, here are ten things coaches can do everyday to help reduce the impact of stress and trauma on families.

1. Provide a comfortable, safe, and private space to meet.
2. Ensure that the physical environment reflects and honors the diverse groups in the community.
3. Take time before every meeting to calm and center yourself.
4. Build on participants' strengths.
5. Divide action items into small manageable steps.
5. Develop short timelines to complete small steps so participants experience success early and consistently.
6. Provide choices for participants including when and where to meet, and how they would like to receive services or referrals.
7. Support participants to find ways to remind themselves of action steps or changes they want to make.
8. Make decisions together, especially when moving from one approach to another.
9. Make information clear, culturally relevant, and easy to read so that it is easy to act on.
10. Remember to stay positive and build on participants' strengths.

FOR COACHES

Date revised: 8-15-19 | Version 1.0

www.FamilyCenteredCoaching.com

Family Focused Powerful Questions

<https://familycenteredcoaching.org/coaching-toolkit/family-focused-powerful-questions/>

Family-Centered Coaching

FAMILY FOCUSED POWERFUL QUESTIONS

ASSESSMENT

- What will your family think is best?
- How will your family feel about your goal?
- What about your goal will resonate most with your family?

ELABORATION

- What other ideas might your family have?
- What else would your family say?
- What more would your family want?

EVALUATION

- What is the opportunity for your family?
- What is the challenge for your family?
- How does this fit with your family's plans/way of life/values?

EXPLORATION

- What can you explore with your family?
- What part of the situation have you not yet explored with your family?
- What other angles would your family suggest?
- What is just one more possibility?
- What are your other options?

IMPLEMENTATION

- What role can your family play in your action plan?
- How can your family support you?
- Which family members will you ask to support you?
- When will you do it?

OUTCOMES

- What do you want for your family?
- If you got it, what would you have?
- How will you know you have reached it?
- What would it look like?

PREDICTIONS

- How do you suppose it will impact your family?
- Where will this lead your family?
- What will your family gain or lose?
- What are the chances of success?

RESOURCES

- What resources can your family provide to help you decide?
- What do you know about it now?
- What do you need to know and how can your family help you access this information?

TAKING ACTION

- What action will you take?
- What actions will family members take?
- And after that?
- What will you do? When?
- By what date or time will you complete these steps?
- By what date or time will your family members complete their

GOAL SETTING

- What do you want for yourself?
- What do you want for your family?
- What is your desired outcome?
- If you got it, what would you have?
- How will you know when you have reached it?

FOR COACHES

Date revised: 8-15-19 | Version 1.0

www.FamilyCenteredCoaching.com