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Of the eleven items of the Strengths Model Case Management Fidelity, one in particular, the Recovery Goal Worksheet (RGW), seems to be the most difficult for agencies to achieve high fidelity. Of the nine teams that have reached at least 18 months of implementation in Kansas, the average score on the RGW item (based on a 5 point Likert scale) has been 2.5 at six months, 3.2 at one year, and 3.8 at eighteen months.

The difficulty in achieving high fidelity seems to stem from a few factors:

1) The RGW is incompatible with a reactive style of case management.

2) The RGW requires multiple skill sets that are not easily learned in standard training formats.

A few facilitating factors are critical for teams to achieve high fidelity on this item:

1) Case managers must understand the concept behind using the RGW.

2) Clear expectations must be set by the agency and the team’s supervisor for using the RGW.

3) Case managers should start practicing using the RGW with a small number of clients at first.

4) Supervisors should provide weekly feedback and field mentoring until case managers have learned the skills needed to do high quality RGWs.

We will now speak in more detail about each of these facilitating factors.
Understanding the Concept behind the RGW

The Recovery Goal Worksheet is a Strengths Model tool designed to help a person make progress toward a goal he or she has identified. It honors the principle that the person we serve is the director of the helping relationship. It is in effect the shared recovery agenda between the client and the case manager. The long-term goal comes directly from the Strengths Assessment and is stated just as the client understands it. If they would like to have more friends, then the goal is written as “I want to have more friends” and not as “To increase socialization skills” or some other professional jargon.

In essence the RGW is a “to-do-list” that is populated one step at a time and so is continually updated during nearly every meeting. At the beginning of a meeting with a client, the RGW may be reviewed and steps that have been completed can be marked as accomplished and tasks identified to be completed during the present meeting can be worked on. At the end of the meeting, the client and case manager can identify new steps that the client and/or case manager might do prior to the next visit or steps they might take together at the next meeting.

This concept is difficult for some case managers to grasp, especially if they have been used to providing services that are primarily reactive in nature. This is exemplified by the tendency of some case managers to schedule weekly appointments with clients and not know what they are going to work on until they show up at the person’s apartment. The case manager then reacts to whatever problem the client is facing at the time and helps them to resolve it. The RGW is incompatible with a reactive style of case management. The RGW requires that the case manager think more purposefully about what they are doing with a client to help them make progress toward their recovery. Each meeting results in a purposeful activity, that is recorded on the RGW, aimed at helping the person achieve their goal.

It is understandable that clients will at times have crises or experience problems that need to be addressed. In these instances, it is important that the case manager help the client through these times. But often the RGW can still be used to help a client think through and resolve these crises or problems in order to get back to working on a goal that is important to him or her.

Expectations around the RGW

In order to help staff master the RGW, it is important that the agency hold the expectation that the case manager become proficient at using the RGW. Some agencies write expectations for using the RGW into case manager's job descriptions and also base performance evaluations in part on their proficiency in using this tool.

Along with expectations for case managers, there also needs to be the expectation that the agency will provide a supporting environment in which to learn the skills needed to become proficient at using this tool. This would entail receiving adequate training on how to use the RGW, getting weekly feedback on their RGWs, and having field mentoring available so the supervisor can model the skills for the case manager as well as give them feedback when using the tool with clients.

Starting out slow

A frequent barrier to learning the RGW is when a case manager tries to use the RGW with all of their client before they have mastered particular skills. Our recommendation is to have the case manager try using it with one or two clients, preferably ones that already have a passionate goal in which the client could benefit from having the goal broken down into smaller measurable steps (e.g. I want to get a job, I want to get a car so I can get out of the house more, I want to learn how to better manage the voices so I can be a better parent to my child). Practicing using the RGW on a client who is willing to try using the tool provides a great environment for learning. There are multiple skills involved in using the RGW including:

1) Making sure you have a goal that the client is passionate about.
2) Making sure that the goal and action steps are written in the client’s language

3) Being able to break a goal down into smaller, measurable steps

4) Writing down only enough steps to generate movement from one meeting to the next (rather than trying to write the entire plan in one meeting)

5) Writing down steps that allows the client to be involved in achieving their own goal

6) Using reasonable time frames to accomplish each step (but not so far out that you lose focus)

7) Being able to use the RGW to guide discussions during each meeting

8) Using the RGW to celebrate each small step toward achieving a larger goal.

Once a case manager becomes comfortable using the RGW with a few clients and have demonstrated the skills needed to use the RGW regularly in practice, then the case manager can start to use the tool with more clients. Always remember that a new skill is not usually an overnight attainment. Like any skill learn, it requires practice and feedback until we master it.

Another skill needed for using the RGW is knowing when to introduce this tool to a client. Thinking about the stages of change can be helpful in this endeavor. The RGW is primarily designed to assist people in the action stage of achieving a particular goal. But the RGW can also be beneficial to helping a person in the contemplation stage (exploring pros and cons of pursuing a particular goal) or even the preparation stage (taking some smaller steps to get ready for taking action or gathering information about steps needed to achieve a goal). But if a person is in the pre-contemplative stage, starting a RGW could have negative consequences. We see this when a case manager tries to use the RGW to get the client to do something that is not a high priority for the client (i.e. keep apartment clean) or the client agrees to work on a goal because they think that is what the case manager wants, but he or she is not invested in working on the goal for themselves. Case managers also need to be careful when introducing the RGW to a client who is in the contemplation stage. While it is fine to use the RGW, if the case manager and client are clear that they are only exploring the goal, a client might resist if they start feeling the case manager is pushing them towards action before they are ready.

**Role of the Supervisor**

Learning to use the RGW without the active support of a supervisor is difficult. While a few case managers grasp the concept and skills quickly from an initial training, this is not the case with most. For a supervisor to be able to teach others to use the RGW, they need to become proficient at using the tool themselves. Some supervisors carry a small caseload (one or two clients) with whom they can practice using the tool. Others may need to go out with one of their case managers and practice using the tool along with their staff.

A critical method for teaching the skills to successfully use the RGW in practice is field mentoring. Field mentoring can take many different forms. For example, the supervisor can take the lead role and model use of the RGW with the client while the case manager observes. After the meeting, the supervisor and case manager can discuss the process together. Another way is for the case manager to take the lead role and use the RGW with the client, while the supervisor observes the interactions. Another way is for the case manager to take the lead role, with the supervisor being able to prompt a particular action if needed during the meeting. Either way, it is important that supervisors and case managers agree on their roles and the goal of field mentoring prior to going out to meet with the client.

Other important means of teaching the RGW can include simulated role plays between the case manager and the supervisor or other team members, turning RGWs directly into the supervisor for feedback, and/or
having team member review each other's RGWs and offering feedback in a group setting.

Conclusion

While attaining proficiency using the Recovery Goal Worksheet can take time, it is possible with the proper amount of support and methods of teaching. We have found that case managers who have been hired after the agency has started implementation often achieve proficiency faster than case managers who have worked at the agency for years prior to implementation. What this suggests is that learning a new skill such as the RGW is not as difficult as un-learning old behaviors that are at times inconsistent with using the RGW. We also find from focus groups with client during fidelity reviews that clients that are exposed to the RGW speak very highly of this tool, including comments such as “it helps me to stay focused on my goals,” “it shows me how far I have come – I can see I am making progress,” and “I have more hope for my life, because I see that I can accomplish anything I set my mind to, I never thought I would have achieved this just a few years ago.” Agencies that lay out clear expectations for use of the RGW and devote the resources toward helping staff develop their skills are often rewarded with staff who feel more confident in doing their work with people and clients who achieve goals that are meaningful and important to them.

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