Group Case Discussion Guidelines

Home Stretch WA

Government of Western Australia
Department of Communities

Produced by:
Anglicare WA
Home Stretch WA Team

Acknowledgements

We acknowledge all of the elders, foster and family carers, residential care programs, biological families and young people who have so generously and courageously contributed their learned and lived expertise in the design and development of the Home Stretch WA's Invest In Me Funding approach.

We acknowledge Aboriginal people as the Traditional Custodians of this land. We pay our respects to their strength, cultural resilience and the Elders past and present.

Contents

This Practice Guideline has been developed for Home Stretch WA teams to implement Group Case Discussion as one of the ways to provide practice support to their team.

Context & Purpose

This document outlines the approach to group case discussion and review that should be used by Home Stretch WA providers

The primary purpose of case discussion is to ensure that the care and support for young people and their families is planned and delivered with integrity to the principles and practice of the Home Stretch WA model. It is a critical mechanism for practice governance and provides an opportunity for reflection and practice development of all team members.

The purpose of case discussion is to compliment individual supervision provided to staff. It does not serve as a replacement or alternative to individual supervision.

The expected outcomes of case discussion are to ensure that:

- Young people's individual case and progress are reviewed by the team at least once per year
- Opportunities for professional development and networking are regular integrated into the team workflow.
- Team members have an opportunity to develop and share their specialist skills or knowledge across the team.
- A culture of non-judgmental reflective practice is embedded within the Home Stretch WA team.

Background

The case discussion process ensures that every young person is provided with the highest standard of support, and that the responsibility for achieving this is shared across the whole of the Home Stretch WA team. While the main focus of transition coaching is the direct provision of individualized services and supports to young people, it is important that the quality and nature of that support is consistent across the team.

The case discussion process should provide workers with a safe and non-judgmental environment in which to openly share and reflect on their work and the progress of young people. Sharing of information and the provision of constructive feedback across the team should be emphasised as it allows for the development of a team culture of reflective practice. The evaluation and judgement of practice should be minimised, and each transition coach should be validated for their skills and expertise.

While the case discussion model used by Home Stretch WA has elements of group or peer supervision, it is not defined by any one specific model of group supervision. The described model draws on approaches used by multi-disciplinary teams that undertake regular clinical review of cases within the field of youth mental health and alcohol and other drug services. It also incorporates elements of youth work supervision that are employed more broadly across youth work programs.

The approach to case discussion described has been developed to be consistent with the supervision policy and procedure at AnglicareWA. Some elements of the 'Bells that Ring' Model of Group Supervision have been incorporated into the case discussion model to promote the development of supervision and reflective practice skills within the team.

Scheduling and Location of Case Discussion

Case discussions should be held on a minimum fortnightly basis, and generally scheduled to include sufficient time for the detailed review of at least 3 cases.

The meetings will generally last for approximately 90 minutes, though sometimes may be extended to allow for brief presentations on practice or other information relevant to the team.

The location of case discussion meetings will be decided by the Home Stretch WA program Coordinator

Case Discussion through Digital Channels

Case discussions can occur using teleconference facilities, and information can be shared and recorded on the appropriate digital platform.

Case Discussion and Agency Visits

Opportunities to attend other programs and sites should be part of the schedule for case discussion, where the team can orient and connect to other programs and conduct the case discussion meeting at their site. Team members can suggest specific sites or programs to visit, and with endorsement of coordinator, request to use the site and private room for case discussion.

Case Discussion to Promote Shared Care

Where there is shared care of a young person with the other service, opportunities to invite specific staff from the other service to attend the case discussion to provide reflections and input. Privacy and confidentiality should be maintained where there isn't direct consent for information sharing, cases can be de-identified for the purposes of inviting participation of other staff and agencies.

Case Discussions to Inform Co-design and Local Adaptation

As part of establishing the Home Stretch WA service offer in different districts, the Community of Practice may use case discussion as a mechanism to develop and consolidate onboarding process, blueprints and pathways for a smooth transition.

Roles and Responsibilities

To encourage the development of reflective practice skills, the case discussion structure separates out distinct roles that are held by different team members.

Rather than having open forum discussions, each case is unpacked and presented by the young person's transition coach, and have this process supported by a nominated 'Group Supervisor'.

Presenter

The Transition Coach prepares a brief presentation about a young person, drawing on their experiences of working with the young person, any intake or assessment tools completed, outcomes data from quarterly reports including Most Significant Change Stories.

Group Supervisor Role

Within each case discussion helps to unpack, reflective questions, time limit and guide the presentation as needed. Their goal is to help the presenter clarify and explore their work with young people without analysis or feedback.

Team Observers

Quietly observe both the presenter and group supervisors' narratives and take notes of any reflections or ideas that emerge. The observers should wait until the end of the initial presentation before asking questions or proposing ideas.

Observers are looking for the themes and issues that arise in the case presentation, the strengths of the work being undertaken, any issues or concerns that might need to be explored, and suggestions for actions and resources. The observers should also listen for 'Bells that Ring' which are insights or reflections that resonate strongly with the observer. These might be personal or professional and reflect similar experiences with young people.

Once the initial presentation has finished, the Group Supervisor will invite the team to offer reflections, advice and information on case presentation.

Note Taker

Each case discussion will be documented by a nominated note taker who records any insights/actions that are shared and records this information into case discussion template during the presentation. The note take should records agreed actions and reflections in an objective way and seek to clarify any information to ensure it is recorded accurately.

Home Stretch WA Program Coordinator

- Create and share an agenda for the Case Discussion meeting, at least 1 week prior to the meeting.
- Track intake allocations and onboarding status of young people through the client management spreadsheet and identifies new cases for initial presentation. These names are emailed to transition coaches at least 1 week prior to the meeting.
- Track young people's case discussion review dates and allocates cases for discussion. These names are emailed to transition coaches at least 1 week prior to the meeting.
- During case discussion, provide oversight and guidance to the discussion when required. The coordinator may need to set boundaries around the limits and capacity of the program to meet any practice or resource recommendations that are raised in case discussion.

Guidelines for Case Discussion

The Home Stretch WA Coordinator should create and share a brief agenda for each case discussion which should incorporate the following elements:

- Welcome and Acknowledgement of Country
- New Case Presentations [20-30mins]
- Exit Case Presentation [20-30min]
- Ongoing Case Presentation [10 -20mins]
- Brief Case Presentations for Team Input [5min]

Process for New Case Presentation

- Young people must have had some engagement with the coach, and typically will occur in the first 3 months of engagement.
- Transition Coach is supported by Group Supervisor role to present information about the life domains in a concise way. Team Observers listens, but reserve comments and reflections until the end of the initial presentation.
- The Group Supervisor can choose to lead a reflection of stages of onboarding and engagement flow chart if there are specific challenges or learnings from the onboarding process.
- Shared Care [U18] cases are presented in collaboration with the Child Protection case manager [if possible]
- Coordinator sets review date for next case discussion [6 or 12 months]
- Complex cases and serious issues are deferred to consultation outside of the case discussion, information can be than be brought back to a follow-up case discussion meeting.

Process for Ongoing Case Presentation

- Coordinator tracks young people's case discussion review dates and allocates young people’s case for discussion. These names are emailed to transition coaches at least 1 week prior to the meeting.
- Transition Coach prepares brief summary of progress, strengths and challenges across the life domain.

Process for Staying On Review Discussion

- The Staying On Facilitator may wish to present a particular Staying On Agreement for broader discussion in the team. This will be prepared in collaboration with the Transition Coach.
- Where a coach is presenting a young person who is in a Staying On Agreement, the Staying On Facilitator will assist in providing information about the Staying On Agreement and post a copy of the current agreement into the Miro board.

Process for Opt-Out/Exit Case Presentation

- Coordinator tracks young people ageing out in the next 12 months and prioritizes them for discussion at least 9 months before they reach 21.
- Transition Coach prepares brief summary of progress, strengths and challenges across the life domains. Coach also reflects on potential support needs after 21 and highlight any areas of need that require support post 21. This information is then used to aid the development of the Handover Summary in collaboration with the young person.
- Transition Coach is supported by supervisor role to present information about the life domains in a concise way. Team listens but reserves comments and reflections until the end of the full presentation.

* Young People who Opt Out - reasons for Opt-ing Out, and alternative supports or support directory is explored in the discussion. Young people who are being Opt-ed Out due to non-engagement are presented to the team to ensure that decision is consistent with practice principles and service offer.

Key Considerations for Exit Discussion

- Presentation & reflection on Home Stretch WA support and support needed post 21
- Review Invest in Me Funding & Opportunities to plan for Financial supports post 21
- Commence handover planning process and identify key people/ support networks, district office or other to hand over to.
- Discuss outcomes data.

Developing Practice Skills and Knowledge

Awareness of Practice Development Needs

The Home Stretch WA coordinator should regularly monitor and track the practice support needs of team, and where there are opportunities to develop team's skills and knowledge through inviting a consultant or specialist to attend the case discussion meeting. Team members might also suggest a particular practice need.

The following are examples of how to integrate practice skill development through group supervision;

Specialist Case Consultation in Case Discussion

Where a particular case requires more intensive review, this can either be the focus of a longer case discussion session [40mins] with information about the case provided to the consultant/specialist prior to the meeting. Selected cases are relevant to the consultant area/program and are identified as shared learning opportunities for the team.

Individual consultation about cases that require a significant amount of discussion or are unique to the individual client, should occur outside of case discussion and be presented back to the team for review.

Specialist Consultation in Case Discussion

Where there are emerging trends in support needs, or a particular practice area that the team would benefit from, a specialist in that area can be invited to attend the case discussion meeting. The individual may be asked to provide a brief outline or presentation of that practice and then invited to sit in the broader case discussion to provide their practice lens to the case discussion. This can be useful in encouraging reflective practice in specific areas

Case Discussion and Agency Visits

Opportunities to attend other programs and sites should be part of the schedule for case discussion, where the team can orient and connect to other programs and conduct the case discussion meeting at their site. Team members can suggest specific sites or programs to visit, and with endorsement of coordinator, request to use the site and private room for case discussion.

Shared Care

Where there is shared care of a young person with the other service, opportunities to invite specific staff from the other service to attend the case discussion to provide reflections and input. Privacy and confidentiality should be maintained where there isn't direct consent for information sharing, cases can be deidentified for the purposes of inviting participation of non- Home Stretch Provider Staff.

Smooth Transition [U18]

As part of establishing the Home Stretch WA service offer in different districts, the Community of Practice may use case discussion as a mechanism to develop and consolidate onboarding process, blueprints and pathways for a smooth transition.

Developing Practice Skills and Knowledge cont…

Information Sharing and Professional Development

Any presentations beyond the agenda of the case discussion will require additional time either at the start or end of the meeting.

The coordinator may request that team members provide a brief presentation on their area of practice expertise to the team, or to present a case and provide some reflection and examples of specific approaches that might be helpful to the team.

Documenting and Recording of Case Discussion

Case discussion is an opportunity for a Home Stretch WA team to develop a broader understanding of the needs of the young person, and the efficacy of the support being provided. It is also an opportunity to identity, understand and plan responses to risk issues.

All case discussion notes should be documented and recorded as part of the young person’s digital file, with a copy of any specific case discussion tools or templates also recorded in the young person’s digital file.

Case discussion tools should encourage holistic reflection of the strengths and needs of the young person, their support circles and support and interventions offered since the last time the young persons’ situation was reviewed. In using tools or templates, it is suggested that a template that encourages transition coaches to reflect on the support provided to young people in the life domains.

Tools & Touchpoints

Practice Governance Tools

- **Agenda for case discussion** [selected names sent out 1 week prior to meeting]
- **Client Management System** - Coordinator holds Minimum Data Set spreadsheet to track onboarding and case discussion review dates
- **Case Presentation Template-** Life domains template, can be adapted for providers to be used via online whiteboard/ whiteboard/ paper/ other form. Onboarding templates can also be utilized/ adapted.
- **Supervisor role description for new cases and case discussion** [drawing on bells that ring]
- **Guidelines for consultants** - to protect privacy and agree on role clarity when inviting into Case Discussion

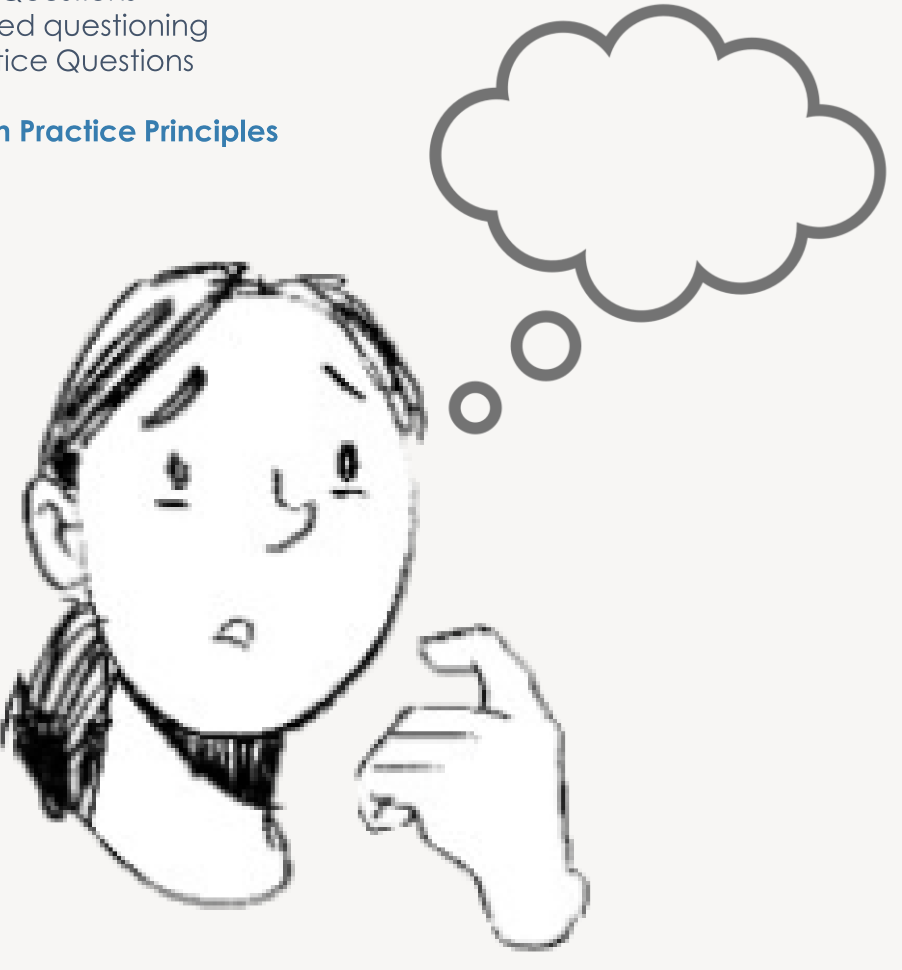
Professional Development of Staff

- Coordinator aware of strengths and knowledge of team.
- Opportunities to present reflections on good practice

Reflective Questions to Support Case Discussion

- Reflective practice questions document
- Life Domains Questions
- Strengths Based questioning
- Cultural Practice Questions

Transition Coach Practice Principles



Appendix

The Appendix following is a copy of the OP-PT-002 – Home Stretch WA – Operational - Case Discussion – Life Domains – Template which you can find on the website.

Case Discussion -/ Reflective Practice Life Domains Template

Background Information:

- Age
- Length of time with Home Stretch
- Referral & Onboarding reflection

Opportunities for Support/ Actions for Follow Up

Invest In Me Spending – Review Dashboard

Reviewed By:

Health & Wellness

Housing & Accom/ Staying On

Employment Education & Training

Financial Security

Parenting/ Children

Works Well

Name

Date

Challenges

Support Circle

Life Skills

Identity & Culture

Legal

Guidelines for Case Discussion Template- Life Domains

This template can be used with the **Home Stretch WA- Group Case Discussion Guidelines.**

It can be used as a guide for providers to develop and adapt their own templates via an online platform (Whiteboard) or other mediums for group case discussion/ supervision.

Step by Step Guide for Case Discussion:

1. Prior to Case Discussion meeting Group Supervisor/ Coordinator emails out names for Case Discussion and a copy of Case Discussion Life Domain template or link to the online template on whiteboard.

2. Transition Coaches can use the template to pre-populate key points in each of the life domains including strengths, challenges and opportunities to seek group feedback (this is not meant to be exhaustive). On the day Transition Coaches can be prompted to talk through each domain if no prior preparation.

3. Transition Coach is supported by Group Supervisor role to present information about the life domains in a concise way. E.g. A 5-10 minutes with a quick summary of each domain and strengths/challenges. Group supervisor can draw on reflective questions.

4. Team Observers listens, but reserve comments and reflections until the end of the initial presentation.

5. Group Supervisor opens up for the rest of the group to share any comments/ feedback, ideas and discuss any key points and key strengths/challenges. Other members can also ask reflective questions

6. Group Supervisor can confirm key actions from discussion & Note Taker documents actions in case discussion template on whiteboard

7. A copy of the Case Discussion record can be then saved to the client's digital file

Additional Tools for Reflection in Case Discussion

- **Case Discussion Reflective Questions**
- **Home Stretch Practice Principles**
- **Invest in Me Spending data** – reflect on spending in life domains – any trends
- **Outcomes Data**
- **Cultural Practice Questions**

Case Discussion Reflective Practice Questions

Questions about what you currently know or understand

- What information or knowledge have you obtained about this young person
    - Factual knowledge (e.g. physical or mental health conditions, substance misuse, human development)
    - Theoretical knowledge or research
    - Knowledge of social context or disadvantage
    - Law or policy
- Where did this information come from?
- What do you need to know more to work with this young person?
- How will you assess this persons needs?
    - How will you communicate with them (are there any barriers?)
    - What information do you need to gather?
    - What tools or approaches will you use to gather information?
    - Who else do you need to speak with?

Questions about taking action and decision making

- What are the priorities you have identified in this work?
- How do you make plans and agree on goals with the young person?
- How did you work with other professionals (what worked well, what were the challenges?)
- What are the critical next steps from your perspective?
- What are the critical next steps from their perspective?
- What knowledge underpins the decisions you made with/about this person (Factual knowledge, theory, policy, research)?
- What interventions, tools or approaches have you used with this person ?
    - What is the intervention about (what makes it different to other approaches)?
    - What do others think about this intervention (e.g strengths, limitations, contexts when it is useful or not?
    - How does it apply to the young person?
- How have you managed differences of opinions or conflict?

Questions about the helping relationship

- How have you developed a relationship with this person and worked in partnership with them?
- How did you make sure the person understood you and you understood them?
- How do you collect and integrate feedback into your work with this person?
- What might influence this persons behavior (e.g. physical or mental health, trauma, childhood experiences)?
- How did you balance between facilitating, supporting, advocation or directly intervening?
- How have you managed care versus control? (how have you shown care and compassion and how have you used professional authority when required)?
- How have you worked collaboratively with other professionals (Did they have other priorities/ values/approaches

Case Discussion Reflective Practice Questions

Transition Coach Practice Principles

- What practice principles apply in this situation?
- What practice principles were you drawing on in your intervention?
- What practice principles do you most resonate with or find easy to implement? Why?
- What principles do you find most challenging and to implement? Why?
- Are any Practice Principles at Tension with each other?

Support Circles

- Who are the key people in this work?
- Have they each been involved appropriately (boundaries)?
- Who/what is the person's "community"?
- What are their cultural needs?
- Who is influencing this situation?
- In what ways is their influence helpful and not so helpful?
- Who's missing from the story?

Other Guiding Questions

- What lights them up?
- What gets them excited or Motivated?
- What are some of their key strengths?
- What are their hobbies/interests?
- What is their relationship like with their biological family?
- What has been the most significant change for the young person from their perspective? Your perspective?

Invest In Me Spending

- Are they Accessing Invest in Me?
- How are they accessing it- Aspirational/Emergency?
- Are there any themes?

Future Aspirations

- What are your hopes for the young person when they turn 21?
- What do you think the young person's hopes are?
- What does "success" look like at 21 for this young person? Your thoughts/ their thoughts

Reflecting on a Critical Incident- Questions

- Can you describe the incident that occurred with the client
- What was the context to this
- What did you see
- What did you say or do
- What did the client say or do what happened next

- What feelings were evoked for me
- Where these feelings mine or did they come from the client
- What was familiar to me in the situation
- What surprised or unsettled me
- What does this situation remind me of
- What can I use from a similar situation relevant to this one

Referral & Onboarding Templates

Case Discussion- Referral & Onboarding Reflection Template

Referral

- Where was the referral from? (District)
- Basic Information
- Age
- Living Situation
- Supports

•Text

Stage II & Engagement Strategy

- How was the Stage 2 Process?
- How did you plan to engage the young person?
- What was helpful? What wasn't?

•Text

Meet & Greet

- How was the meet and Greet?
- How was the "pitch"?
- What worked? (Location/setting)
- What didn't?
- Who was there?

•Text

Sign Up Meeting

- How was the Sign up?
- Amy Issues or concerns?

•Text

Working Together & Next Steps

- Is there a working together plan with key supports?
- What are the next steps
- Current focus of working together /goals
- Issues/Concerns

•Text

Actions/Opportunities/Reflections

•Text

Referral & Onboarding Templates

Case Discussion- Staying On - Referral & Onboarding Reflection Template

Referral

- Where was the referral from? (District)
- Basic Information
- Age
- Living Situation
- Supports
  - Text

Stage 2 & Engagement Strategy

- How was the Stage 2 Process?
- How did you plan to engage the carer/young person?
- What was helpful? What wasn't?

•Text

Meet & Greet

- How was the meet and Greet?
- How was the " Staying On pitch"?
- What worked? (Location/setting)
- What didn't?
- Who was there?

•Text

Planning for the Staying On Agreement

- How was the initial discussion with Carer/Young Person
- Handover of Carer Supports
- Any Issues/Concerns

•Text

Setting up the Staying On Agreement

- How was that agreement facilitated?
- What Worked? What didn't Work?
- Support Needs for Carer/Family
- Strengths/Challenges
- Next Steps

•Text

Actions/Opportunities/Reflections

•Text

Example Agenda for Case Discussion

Home Stretch Case Discussion Agenda

Date		**Presenter**	
Time		**Note Taker**	
Location		**Supervisor/Time keeper**	

#	**Items**	**Notes/ Names for Case Discussion**
1.	Welcome, Acknowledgment & Apologies	
2.	New Case Presentation [20-30mins]	
3.	Ongoing Case Presentation [10-20 mins]	
4.	Opt Out/ Exit Case Presentation [20-30 mins]	
5.	Brief Case Presentation for Team Input [5 mins]	
7.	Next Case Discussion [Review Tracking Spreadsheet] • Allocate Names • Allocate Roles	Names: **Presenter:** **Supervisor** **Note Taker:**
7.	Other items to discuss	

Next Meeting:

Example Agenda for Case Discussion

Home Stretch Case Discussion – Definitions

Item	Definition/ Guidelines
New Case Presentation [20-30mins]	• Young people must have had some engagement with the coach, and typically will occur in the first 3 months of engagement. • Transition Coach is supported by Group Supervisor role to present information about the life domains in a concise way. Team Observers listens, but reserve comments and reflections until the end of the initial presentation. • The Group Supervisor can choose to lead a reflection of stages of onboarding and engagement flow chart if there are specific challenges or learnings from the onboarding process. • Shared Care [U18] cases are presented in collaboration with the Child Protection case manager [if possible] • Coordinator sets review date for next case discussion [6 or 12 months] • Complex cases and serious issues are deferred to consultation outside of the case discussion, information can be than be brought back to a follow-up case discussion meeting.
Ongoing Case Presentation [10-20 mins]	• Coordinator tracks young people's case discussion review dates and allocates young people's case for discussion. These names are emailed to transition coaches at least 1 week prior to the meeting. • Transition Coach prepares brief summary of progress, strengths and challenges across the life domain.
Opt Out/ Exit Case Presentation [20-30 mins]	• Coordinator tracks young people ageing out in the next 12 months and prioritises them for discussion at least 9 months before they reach 21. • Transition Coach prepares brief summary of progress, strengths and challenges across the life domains. Coach also reflects on potential support needs after 21 and highlight any areas of need that require support post 21. This information is then used to aid the development of the Handover Summary in collaboration with the young person. • Transition Coach is supported by supervisor role to present information about the life domains in a concise way. Team listens but reserves comments and reflections until the end of the full presentation. * Young People who Opt Out - reasons for Opt-ing Out, and alternative supports or support directory is explored in the discussion. Young people who are being Opt-ed Out due to non-engagement are presented to the team to ensure that decision is consistent with practice principles and service offer. **Key Considerations for Exit Discussion** • Presentation & reflection on Home Stretch WA support and support needed post 21 • Review Invest in Me Funding & Opportunities to plan for Financial supports post 21 • Commence handover planning process and identify key people/ support networks, district office or other to hand over to. • Discuss outcomes data
Brief Case Presentation for Team Input [5 mins]	• Opportunity to get team input on individual cases
Specialist Case Consultation [40 mins]	• Where a particular case requires more intensive review, this can either be the focus of a longer case discussion session [40mins] with information about the case provided to the consultant/specialist prior to the meeting. • Selected cases are relevant to the consultant area/program and are identified as shared learning opportunities for the team. • Individual consultation about cases that require a significant amount of discussion or are unique to the individual client, should occur outside of case discussion and be presented back to the team for review.
Next Case Discussion [Review Tracking Spreadsheet] • Allocate Names • Allocate Roles	