

CASE MANAGEMENT

CREATING A PLAN FOR CHANGE THROUGH COVENANTAL COMMITMENT

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COMMUNITIES FIRST

WORKBOOK 4

Case Management

Creating a Plan for Change through Covenantal Commitment

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The Church has a responsibility to demonstrate the love of God by encouraging and equipping people in need to realize their gifts and calling as his image-bearers. These gifts include the abilities, aptitudes, and passions given to them by the Creator. Their calling is the fruitful exercise of their gifts in wholesome modes such as family, education, vocation, the arts, civic responsibility, and the church.

One way in which churches are called to the task of individual development is through committed mentoring relationships. Jesus did not just send down instructions on how to live in His kingdom. He came down himself to live among people in relationship with them, with mercy on them, as an example to them, while sacrificing his life for them. God is a God of covenant—the unwavering commitment of love and truth in a relationship. Case management helps people to follow a plan for change that is similarly rooted in a covenantal commitment of love and truth in a relationship.

The following practical components are vital for a case management ministry:

1. assessing the needs, gifts, calling, and hopes of the participant
2. the development covenant between mentor and participant
3. follow up and evaluation

1. Initial Assessment

(the following materials may be photocopied and used as you begin initial assessment with a participant.)

A. Family Status Inventory (see Appendix A)¹

This assessment tool takes comprehensive inventory regarding a family or an individual. This tool identifies the strengths, needs, and priorities regarding the following life issues: income, adult education, substance abuse, shelter, transportation, employment, nutrition, physical and mental health, family relationships and children's education.

B. A Plan for Success and a Memo of Understanding with Myself (see Appendix B)²

These assessment tools are documents to be filled out by the participant in the very beginning stages of their interaction with the church. It will allow them to identify their gifts and set goals for themselves while establishing a contract with the church regarding their level of involvement.

These tools include an assessment of the participants' needs, gifts, sense of calling and hopes for the future. They also include the development of specific goals and accountability.

¹ Jeff Littlejohn, CRWRC

² Ruth Hoekwater, CRWRC, Communities First Workbook Draft-Mentoring for Self Sufficiency

Working through these assessments and covenants is not to be done hastily. It is not a simple process. The key to success is establishing a climate of trust between mentor and participant. Each participant has a unique personal context, degree of need, and level of development. The level of a participant's crisis affects their ability to be discerning. Therefore, patience, continued dialogue, and understanding are important. It may take several sessions with a mentor to arrive at an accurate picture of a participant's needs, gifts, vision, and realistic goals.

This is what works for Madison Avenue Crossroads Ministries in Paterson, New Jersey:

- helping people to recognize what god is trying to accomplish through the pressure in their lives
- supporting any actions that align their plan with god's purpose
- refusing to participate in plans to escape god's pressure
- sacrificially giving time, money and resources to those who are willing to make positive changes

What does not work:

- judging people based on their circumstances
- using our resources to eliminate pressure
- rescuing people from the consequences of bad decisions

Guidelines for Assessments

What information is needed to make good decisions?

- personal/family history
- income/expense history (see budget form)
- credit history and asset picture
- dreams/goals
- quality of primary support people

When to say "Yes":

- when there is need
- when there is a common goal
- when there is adequate support
- when there is good information
- when there is a good plan in place
- when there is a process for evaluation built in

When to say "No":

- when the recipient does not own the problem or a solution to the problem
- when the recipient does not follow the plan
- when there is no dream/goal to work towards together
- when good sense gives way to addictions

2. The Development Covenant

The Development Covenant is an agreement between the mentor (and the church or organization they represent) and a participant concerning a specific action plan, accountability, and personal development outcomes. The Development Covenant should include the following components where they are applicable:

Issues to be addressed

It is best to work on one or two areas where realistic behavior changes can be realized in terms of what the mentor and their organization can offer.

Action Plan

Establish relevant, attainable goals that can be measured in a set time frame. For example, the participant will attend weekly AA meetings and receive weekly outpatient counseling for the next three months. He will also meet weekly with his mentor to discuss his progress with his goals. The mentor will assist the participant in enrolling for a six-month vocational training program for auto mechanics, as the participant has expressed an interest in this vocation and has demonstrated an aptitude for it. The mentor will also help make connections for the family to receive benevolence, public assistance, child care, and related support. The goals may look like this:

- a. Be completely sober from all drugs and alcohol in one month.
- b. Remain in support group/outpatient counseling for one year.
- c. Complete six-month auto mechanic course.
- d. Be employed as an auto mechanic one month later.

Collaboration with Other Agencies

Technical support from area agencies is often critical to personal development and no one person or church can expect to provide the essential holistic foundation. It takes a community to develop individuals as well as individuals to develop a community. Holistic support may include church services, Bible studies, a substance abuse support group and outpatient services, a vocational training program, and government assistance.

Duration of Development Covenant

The Covenant must cover a large enough time period to establish accountability and behavior changes. The duration of the agreement is a case-by-case issue, depending on the nature of the issues, commitment of the mentor, and progress of the participant. In this case, a high level of accountability between mentor and participant would be most appropriate, especially during the first three months.

Follow-up

The best scenario for effective case management would include periodic follow-up to evaluate progress after the term of the Development Covenant has been completed. Completion of one Development Covenant is often followed by a second and third agreement to achieve additional objectives.

The Commitment of the Mentor

It takes a committed and sensitive mentor to demonstrate mercy and justice for the glory of God's Kingdom. This includes a desire to empathize with the person and their life context; listening and conversing with the person, affirming what is good in the person, and giving firm but gentle exhortation to change specific behaviors. This may involve a growing sensitivity and a process of reconciliation between mentor and participant due to racial, ethnic, and class distinctions; prejudices; and misunderstandings. The best mentor is on his or her knees, asking God to intervene in the life of the participant as well as in his or her own life. The solution for the brokenness, sin, and oppression faced by both mentor and participant is beyond human remedy. God provides the healing.

The Commitment of the Participant

Participants must humbly desire to allow their decision-making processes to be shaped by another, at least until they grow in steps toward self-sufficiency and wholeness. They must be willing to own responsibility for whatever negative behavior or attitudes have contributed to their present condition. They must begin to release bitterness and practice forgiveness toward people they blame for their demise. Participants must realize that happiness will not be gained through quick fixes, emotional highs, or even their own determined efforts. They must learn what it means to be part of a healthy community, and that others need their gifts as much as they need the gifts of others.

3. The Work Back Program

It is helpful to have a participant volunteer time and talent in exchange for assistance given, or as part of their development plan when

- a participant wants to do something in exchange for what is given
- a participant needs to demonstrate commitment or responsibility
- a participant needs the dignity that comes from a positive accomplishment
- a participant needs to experience the personal value of work
- a participant is not ready for a workplace assignment, but is ready for some work.

The Work Back Program is a formal set of tools and agreements that provide opportunities for a participant to work as a volunteer. See Appendix D for the tools.

Example of a Mentor Job Description:

Bethel Pentecostal Church: Position Description³

Position Title: Accountability Coach for Food for Self-Sufficiency Ministries

Position Description: To honor and glorify God by encouraging and holding accountable participants in Bethel's *Food for Self-Sufficiency* ministry for the implementation of their next-step financial goals.

³ City Vision, *Food For Self Sufficiency*

Examples of Duties:

1. Meets weekly with assigned participant.
2. Reviews documents provided by participant that prove participant applied funds saved due to pantry participation to participant's next-step financial plan.
3. Approves or denies participant access to pantry for that week.
4. Records appropriate information in participant file.
5. Prays regularly with and for assigned participant.
6. Honors the good name and reputation of participants.

Accountability: Supervised by Director of Food for Self-Sufficiency Ministries

Additional Information:

1. Attends required training events
2. Agrees to volunteer for one year, renewable

Gift Mix: Accountability Coaches should have a strong desire to encourage others and enjoy praying with them. They need to be able to hold people accountable for their commitments.

Example of a Development Covenant**Contract between your Family and our CCDO⁴***Outcomes:*

1. To pay off \$750 in back bills.
2. To accumulate \$3,000 for a down payment on the family's first home.

What our CCDO will do:

1. Give you access to our Food Pantry each month for 15 months so that as many of your food needs as possible are met here.
2. Review your bill-paying records and your savings book each week to verify that the family is "doing the plan," which is required to gain access to the Food Pantry for the next month.
3. Help you clear your credit report well enough to qualify for a mortgage.
4. After the family pays off a bill, applies \$50 towards the next bill, for a total of \$150.
5. Applies \$500 toward the down payment savings after one year if the family works the plan well.

What your family will do:

1. Receive as much of your family foods as necessary from our Food Pantry.
2. Keep excellent financial records, and bring those involving bill paying and your savings account book weekly to our CCDO for accountability.
3. Pay off the designated bills, and make the designated savings each month.
4. Cooperate with our CCDO on implementing your goals.

⁴ City Vision, *Food For Self Sufficiency*

We agree to the above:

Dad _____

Mom _____

Case Worker _____

Case Studies

For each case example given here, address the following:

1. What are the immediate issues that need attention? (no more than three issues)
2. What questions could you ask to help the person articulate his or her issues of concern?
3. Is there a need for initial assistance to alleviate a crisis situation?
4. What are some realistic short-term (1-6 months) development goals for this person?
5. Create a practical Development Covenant using the components discussed above.
6. How would you follow up and evaluate the participant's progress?

Case 1

Linda, a 25-year-old single mother of three young children, has been coming to the church food pantry. She is on public assistance and is two months behind on rent. In conversation with you, she reveals that she has an on-again, off-again relationship with the father of one of her children. He occasionally comes and stays for several days at a time in her apartment. He is physically and verbally abusive toward her. This young woman has expressed a desire for direction in her life. She would like to get her GED and a meaningful job. She is concerned for the safety of her children because her building and neighborhood are under the cloud of drug-dealing and street gangs. Linda has little positive support from family or friends. She grew up in a church but has been away from it for many years.

Case 2

Carlos and Maria are recent immigrants attending your English as a Second Language (ESL) class. They have four children and have been in the U.S. for four years, but still do not have proper documentation. Carlos works a construction job 12 hours a day, seven days a week. Yet he does not make enough for the family to have their own apartment, so they are staying with another family in very crowded conditions. Maria feels overwhelmed with the responsibility of caring for the children without her husband in the crowded, noisy apartment. In addition to all of this, Carlos and Maria face the pressure of having to send funds to their impoverished family in their home country. The couple wants to become citizens and have a meaningful life in the U.S.

Case 3

Joe knocks at your church door asking where the nearest AA support group is. He is a 35-year-old middle-class construction worker who recently became foreman of a work crew. He claims his “binge” drinking usually keeps him out all weekend. He has been divorced for three years and has two children. His wife has withheld visits with his children because of his drinking. Joe makes good money, manages to keep a nice home and car, and makes his alimony payments. However, his life consists of work, drinking, and trying to pick up women. Joe grew up in the Catholic Church but rarely attends, considering himself “lost” when it comes to religion.

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Appendix A

Family Status Inventory

Results Summary

	Inventory Scale								
	Struggling				Just Getting By				Secure
Income	1	2	3	4	5	6	7	8	9
Adult Education	1	2	3	4	5	6	7	8	9
Parenting	1	2	3	4	5	6	7	8	9
Alcohol / Substance Abuse	1	2	3	4	5	6	7	8	9
Shelter	1	2	3	4	5	6	7	8	9
Transportation	1	2	3	4	5	6	7	8	9
Employment	1	2	3	4	5	6	7	8	9
Nutrition	1	2	3	4	5	6	7	8	9
Physical / Mental Health	1	2	3	4	5	6	7	8	9
Family Relationships	1	2	3	4	5	6	7	8	9
Children's Education	1	2	3	4	5	6	7	8	9

Our family's strengths are:

Areas our family needs to work on:

Our family's priorities are:

Income

Inventory Scale									
Struggling	Just Getting By							Secure	
Income meets all basic needs	1	2	3	4	5	6	7	8	9
Written monthly budget includes all bills to be paid and allows for emergencies	1	2	3	4	5	6	7	8	9
Have some savings put aside each month	1	2	3	4	5	6	7	8	9
Have or can acquire checking account	1	2	3	4	5	6	7	8	9
Can keep a checking account balanced	1	2	3	4	5	6	7	8	9
No bad checks	1	2	3	4	5	6	7	8	9
If family uses credit cards, balance is low and not out of control	1	2	3	4	5	6	7	8	9
Can make all types of financial payments on time	1	2	3	4	5	6	7	8	9
We are not financially overextended	1	2	3	4	5	6	7	8	9
Debts (besides mortgage) do not exceed 15% of our income	1	2	3	4	5	6	7	8	9
Planning for children's future education costs	1	2	3	4	5	6	7	8	9
Planning for retirement income	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Adult Education

Inventory Scale									
Struggling	Just Getting By							Secure	
All adults have a high school diploma or GED	1	2	3	4	5	6	7	8	9
Adults have education/learning goals	1	2	3	4	5	6	7	8	9
Adults can identify a variety of training/education options	1	2	3	4	5	6	7	8	9
Adults attending school, have satisfactory attendance	1	2	3	4	5	6	7	8	9
Fees and tuition is affordable (assumes grants, loans, etc. are being used)	1	2	3	4	5	6	7	8	9
Passing all courses & keeping up on course work	1	2	3	4	5	6	7	8	9
Have reliable transportation	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Parenting

Inventory Scale									
Struggling	Just Getting By						Secure		
<hr/>									
All children are living with parent(s) or permanent guardians	1	2	3	4	5	6	7	8	9
All children are physically and emotionally safe	1	2	3	4	5	6	7	8	9
No children are in danger of being placed in outside care (i.e. foster care)	1	2	3	4	5	6	7	8	9
Family membership is stable	1	2	3	4	5	6	7	8	9
Parents/guardian(s) understand stages of child development and developmental milestones	1	2	3	4	5	6	7	8	9
All children are asked to make decisions appropriate for their age	1	2	3	4	5	6	7	8	9
Child care is provided by qualified persons who are well-known by parent(s) or guardian(s)	1	2	3	4	5	6	7	8	9
Family experiences manageable conflict and can effectively resolve conflict	1	2	3	4	5	6	7	8	9
Clear, realistic rules and expectations exist for all children	1	2	3	4	5	6	7	8	9
All children experience healthy self-esteem	1	2	3	4	5	6	7	8	9
There is good social interaction by all children	1	2	3	4	5	6	7	8	9
Little violence or aggression exists between children	1	2	3	4	5	6	7	8	9
All children are able to relate to parent(s) or guardian(s)	1	2	3	4	5	6	7	8	9
No children are currently in trouble with law or court system	1	2	3	4	5	6	7	8	9
Parents are in control of their emotions when they discipline children	1	2	3	4	5	6	7	8	9
Children exhibit socially responsible behavior	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Alcohol / Substance Abuse

Inventory Scale									
Struggling	Just Getting By							Secure	
<hr/>									
Most social activities by all family members do not involve alcohol	1	2	3	4	5	6	7	8	9
All family members do not use illegal drugs	1	2	3	4	5	6	7	8	9
All family members do not drink excessively	1	2	3	4	5	6	7	8	9
There is not underage drinking by family members	1	2	3	4	5	6	7	8	9
No work, school, appointments or other obligations are missed due to drug or alcohol use	1	2	3	4	5	6	7	8	9
No family members have current legal problems related to drug or alcohol use	1	2	3	4	5	6	7	8	9
[If applicable] Family member(s) are aware of options or treatment	1	2	3	4	5	6	7	8	9
Family members do not use tobacco products	1	2	3	4	5	6	7	8	9
Parents help children learn skills needed for healthy, abuse-free lifestyle	1	2	3	4	5	6	7	8	9
Parents discuss use/abuse of drugs/alcohol with children	1	2	3	4	5	6	7	8	9
Parents model guidelines established on drug/alcohol use	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Shelter

Inventory Scale									
Struggling	Just Getting By							Secure	
Have stable family housing with some choice in housing possibilities									
1	2	3	4	5	6	7	8	9	
No more than 35% of income spent on rent/ mortgage, utilities, insurance and upkeep									
1	2	3	4	5	6	7	8	9	
Current in payments for all housing and utility costs									
1	2	3	4	5	6	7	8	9	
Meets local health and safety regulations									
1	2	3	4	5	6	7	8	9	
No shut off or eviction notice in the last six months									
1	2	3	4	5	6	7	8	9	
Access to telephone									
1	2	3	4	5	6	7	8	9	
Sleeping space available for all family members									
1	2	3	4	5	6	7	8	9	
Family not threatened by neighborhood violence									
1	2	3	4	5	6	7	8	9	

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Transportation

Inventory Scale									
Struggling	Just Getting By							Secure	
<hr/>									
Can access transportation whenever needed	1	2	3	4	5	6	7	8	9
All members use seat belts	1	2	3	4	5	6	7	8	9
If you own a car, complete the following:									
Possess current auto insurance	1	2	3	4	5	6	7	8	9
Possess current licenses and registration	1	2	3	4	5	6	7	8	9
Vehicle is in reliable/functional condition	1	2	3	4	5	6	7	8	9
Have backup in emergencies if vehicle breaks down	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Employment

	Inventory Scale								
	Struggling	Just Getting By						Secure	
Adult(s) employed	1	2	3	4	5	6	7	8	9
Employment steady and reliable	1	2	3	4	5	6	7	8	9
Employment income meets basic financial needs	1	2	3	4	5	6	7	8	9
Employment benefits include health insurance	1	2	3	4	5	6	7	8	9
Have positive work references	1	2	3	4	5	6	7	8	9
Generally positive work experiences last 5 years	1	2	3	4	5	6	7	8	9
Possess specific job skill (i.e., typing, masonry, office management, etc.)	1	2	3	4	5	6	7	8	9
Can talk clearly about abilities and interests	1	2	3	4	5	6	7	8	9
Can complete job application forms	1	2	3	4	5	6	7	8	9
Have a current resume	1	2	3	4	5	6	7	8	9
Have interview clothes	1	2	3	4	5	6	7	8	9
Can interview effectively	1	2	3	4	5	6	7	8	9
Has career goals and a job seeking plan	1	2	3	4	5	6	7	8	9
Seeking additional employment enhancing training/ education	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Nutrition

Inventory Scale									
Struggling	Just Getting By							Secure	
<hr/>									
Can provide enough food to feed family members	1	2	3	4	5	6	7	8	9
All members eat a balanced diet that is varied, healthy and nutritious	1	2	3	4	5	6	7	8	9
Have adequate area for dining	1	2	3	4	5	6	7	8	9
Family does not need to use emergency food services	1	2	3	4	5	6	7	8	9
Family has not used a food bank more recent than 1 year	1	2	3	4	5	6	7	8	9
Meals generally are made from “scratch” rather than from processed/ packaged	1	2	3	4	5	6	7	8	9

Our family’s strengths:

Areas our family needs to work on:

Our priorities:

Physical / Mental Health

Inventory Scale									
Struggling	Just Getting By							Secure	
Family has basic health care	1	2	3	4	5	6	7	8	9
Family has a regular doctor visit (1 per year minimum)	1	2	3	4	5	6	7	8	9
Family has a regular dentist visit (1 per year minimum)	1	2	3	4	5	6	7	8	9
Have ability to buy medically related supplies, prescriptions, and treatments not covered by insurance	1	2	3	4	5	6	7	8	9
Family members do not have untreated ongoing physical or mental illnesses	1	2	3	4	5	6	7	8	9
All family members get enough sleep (8 hours minimum per night)	1	2	3	4	5	6	7	8	9
All family members exercise regularly	1	2	3	4	5	6	7	8	9
All family members have adequate personal hygiene skills	1	2	3	4	5	6	7	8	9
Family possesses basic personal hygiene products (soap, shampoo, toothpaste, etc.)	1	2	3	4	5	6	7	8	9
Family has good communication on sexuality issues	1	2	3	4	5	6	7	8	9
Family members are at appropriate weight for age and gender	1	2	3	4	5	6	7	8	9
All family members have effective coping mechanisms for stress and conflict	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Family Relationships

Inventory Scale

Struggling	Just Getting By								Secure
Family members communicate openly, frequently and directly with each other	1	2	3	4	5	6	7	8	9
Sense a stable family unit and it's clear who's included in the family	1	2	3	4	5	6	7	8	9
Active nurturing of growth and consistent provision of care for all members	1	2	3	4	5	6	7	8	9
Physically safe for all members of the family—no violence or physical abuse	1	2	3	4	5	6	7	8	9
Active, supportive efforts to change negative habits/behaviors	1	2	3	4	5	6	7	8	9
All members are emotionally secure—no emotional abuse of members	1	2	3	4	5	6	7	8	9
Values of family members are known and understood	1	2	3	4	5	6	7	8	9
Discussion and guidance occurs within family	1	2	3	4	5	6	7	8	9
Family feels part of the community	1	2	3	4	5	6	7	8	9
Family has support from others	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Children's Education

Inventory Scale									
Struggling	Just Getting By							Secure	
<hr/>									
Little or no absenteeism by all children	1	2	3	4	5	6	7	8	9
All children working to their potential in all subjects	1	2	3	4	5	6	7	8	9
All children current in all class work	1	2	3	4	5	6	7	8	9
Few discipline problems; parents rarely or never contacted by school about discipline problems	1	2	3	4	5	6	7	8	9
Child(ren) get along with other students	1	2	3	4	5	6	7	8	9
Parents regularly discuss school with all children	1	2	3	4	5	6	7	8	9
All children can and do participate in some school activities	1	2	3	4	5	6	7	8	9
Family members attend conferences and some school related activities	1	2	3	4	5	6	7	8	9
Special needs of children are being addressed	1	2	3	4	5	6	7	8	9
High school graduation is expected of all children	1	2	3	4	5	6	7	8	9
Post high school education and training is discussed as an option	1	2	3	4	5	6	7	8	9

Our family's strengths:

Areas our family needs to work on:

Our priorities:

Appendix B

A. Plan for Success

Many people want the church or their mentor to make their problems disappear. We do not believe this is helpful in the long run. You must face the past and the choices you have made and take responsibility for your future. God has made you special. He has given you everything you need to be a self-directed, contributing member of society. You have the capability to solve your problems and become the person God wants you to be.

The best use of church aid is to give you a boost so that you can move just far enough from a crisis so that you can plan how you will reach a dream for your future. The aid the church gives you will not solve all of your problems. The best we can do is to take the hurtful edge off of your current problems so that we can *partner* with you in finding creative ways to manage your future.

List some things the church could give you or do for you that would make your life a little easier right now.

- 1.
- 2.
- 3.

List items the church agrees to give you or do for you in the next few days or weeks to make your life a little easier. Put a date by each item indicating when it will be given or done.

- 1.
- 2.
- 3.

B. Dreams and Goals

What are your realistic dreams for your future. What goals do have for yourself? Think in terms of housing, employment, education, parenting, security, children, spiritual life, friends, financial contentment, skills, resources etc. Indicate which goals you want to begin working on first.

- 1.
- 2.
- 3.

You have not been able to achieve these goals so far in your life. What are some of the problems that might prevent you from achieving your goals in the future? It might be helpful to list them under the categories listed below. Try to list very specifically the root problems that will likely make it difficult for you to attain each of the goals you wrote down above.

Lack of encouragement or support:

Lack of information:

Lack of skills:

Lack of resources:

C. What Can You Do to Help Someone Else?

Many people who need help are also willing to be helpers to others. Out of thankfulness for the help they received, they are eager to serve. List any hobbies, talents and skills you have that could be used to serve others when that time comes for you.

- 1.
- 2.
- 3.

D. Your Part

We want to partner with you to help you meet your goals listed above. Church assistance and aid works best when it encourages you to do what you can do for yourself. List some steps that you can take to begin achieving each of the goals you listed above.

Goal 1:

- 1.
- 2.
- 3.

Goal 2:

- 1.
- 2.
- 3.

Goal 3:

- 1.
- 2.
- 3.

Goal 4:

- 1.
- 2.
- 3.

Some of your goals may need to be postponed or worked on later. List them here:

- 1.
- 2.
- 3.

E. The Church's Part

The church wants to help you attain your goals. We will write down what you can count on from us. Most of our help will be non-financial. We will help you access the information and services you need. We will connect you to people who can give you information. Your mentor will be

praying for you and meeting with you to give you emotional support. Any financial help will be directed toward helping you create **new opportunities** for yourself.

Goal 1

Goal 2:

1.

1.

2.

2.

3.

3.

4.

4.

5.

5.

List any other assistance the church will provide:

Note: If you do not fulfill your end of this agreement, we cannot fulfill our end of it. If there are good reasons for not following through on this plan, we can always renegotiate different goals or steps. Our help is contingent on your taking action for your future.

F. Evaluation

We want to provide all the encouragement, help, and support you need to attain your goals. Quite a few people find that their initial plans were not quite attainable. They needed opportunity to revise them. To make this process work well, we need to regularly evaluate whether this is the right plan for you and if we are on track with it. Most people find that it needs to be amended or "tweaked" at various times. It is usually helpful to monitor the plan frequently at first and then less frequently when all is going well.

How often will we review your progress with your mentor?

_____ Weekly _____ Monthly

Other Conditions of Agreement:

Signed _____

Date _____

Signed _____

Date _____

MOU to MYSELF (Memorandum of Understanding)⁵

My Name _____

For the purpose of moving my life forward, so that I may grow in character and wisdom, I willingly choose to make this **MOU to MYSELF**, where its contents and fulfillment are supervised by other significant people I trust.

1. My View of Things:

Why I have been placed in this world:

--

Why I have a family:

--

Until I die, my mission for my life is:

--

2. My True Core Beliefs and Values:

I Believe...	
I Believe...	
I Believe...	

⁵ Jeff Littlejohn, CRWRC

I Value...	
I Value...	
I Value...	

3. Things I Like About Myself:

I Like...	
I Like...	
I Like...	

4. Long-term Changes:

I Desire for My Life...	
I Desire for My Life...	
I Desire for My Life...	

5. Immediate Things I Can Do that Contribute to My Long-term Goals:

Your Personal Pledge	Task, Work or Effort...	Date to be done!
I will...		
I will...		
I will...		

Additional sheets may be added later

6. I Authorize “24/7” Accountability by the Following People:

This **MOU to MYSELF** will be reviewed on or near (date) _____ by all parties indicated below as Witnesses, who agree to have an attitude that is honest, truthful, who will tell-it-like-it-is, all within the love and compassion of Jesus Christ.

I agree to this,

Signed _____ Date _____

Witnessed by _____ Date _____

Appendix C

Contract For Positive Directions⁶

To better my life's situation and to gain personal stability that is sustainable,

I, _____ will commit and strive to accomplish the following:

First Step: Immediate Goals

- 1.
- 2.
- 3.
- 4.

In order to help you attain your goals, you should be able to periodically **identify** and **measure** specific achievements **you plan for**. To help you with this planning, write out what you and others will recognize as success changes in your life at intervals of 3, 6, 9 months and 1 year. Some examples are:

Example 1

- In 3 months, I will on a regular basis, be placing 1 ½ % of my gross income into a savings account.
- In 6 months, I will on a regular basis, be placing 2% of my gross income into a savings account.
- In 9 months, I will have saved the equivalent of 1 month's rent.
- In 1 year, I will have saved 1 month's rent and 1 month's regular utility payment.

Example 2

- In 3 months, I will be enrolled in a post-high education program.
- In 6 months, I will have successfully completed one semester or quarter in my education.
- In 9 months, I will have increased my grade-point level.
- In 1 year, I will have successfully completed one unit-year in my education.

⁶ Jeff Littlejohn, CRWRC

Second Step: What Will Success Look Like?

- In 6 months, I will:

- In 9 months, I will:

- In 1 year, I will:

Through God's provision, the help of others, and by my helping myself, I choose to commit myself to this plan and make it succeed.

Participant _____ Date _____

Your Organization's Representative _____ Date _____

Appendix D

[Your Organization's Name]

The WorkBack Program: Participant Instructions

Date _____

Dear WorkBack Participant:

Now that you have volunteered to participate in the WorkBack Program, you will find below the necessary steps you need to take to successfully complete the goals we have discussed.

- Your first responsibility is to seek a volunteer work site Sponsor and offer a total of _____ hours of voluntary service. It will be up to you to find a place to volunteer your services (i.e. business, church, association, government office, etc.) To help you with this, I have sent with you a Letter of Introduction to the Sponsor at this work site. This should give them a good idea as to what you are requesting and what is involved. Please also make sure this person____ reviews the Liability Release form.
- Your second responsibility will be to begin volunteering, according to the schedule and conditions offered by the work site Sponsor. You also must all these _____ hours within 30 days from today.
- Your third responsibility will be to contact me, informing me that you have completed hours of voluntary work. At this point, I will send the 1/2 of the financial assistance promised.
- Your fourth responsibility will be to complete the remaining allotment of _____ hours. At this point, I will send the rest of the financial assistance.

Once these four steps are completed, then you are to be congratulated for your initiative and persistence, for surely this was not an easy thing to do. Yet I trust this experience will return to you many times over in blessing upon blessing!

May God abundantly enrich you through this venture.

Sincerely,

[Signature]

[Printed name of Your Organization's Representative]

[Your Organization's Name]

"THE WORKBACK PROGRAM"

WORKBACK LOG SHEET

WorkBack Participant: _____

Total Hours to Volunteer: _____

Work Site Sponsor: _____

With the input of the WorkBack participant, please keep a record of the date, hours, and work tasks for this person. Below is a table to use for this purpose. Thank you.

Date	Hours	Description of Tasks
TOTAL HOURS		

[Your Organization's Name]

"THE WORKBACK PROGRAM"

COMMUNITY SERVICE PROGRAM - LIABILITY RELEASE

WHEREAS, I _____ (the Volunteer) have requested that _____ (hereafter known as the Sponsor), through _____ [Your Organization] (the Program Manager), and for my own personal benefit, grant me permission to participate in a Voluntary Community Service Program (namely The WorkBack Program) by observing and performing routine work tasks; and the said Sponsor and Program Manager has indicated that it is willing to grant my request provide that I execute in writing this instrument releasing the said Sponsor and Program Manager, and their officials, directors, employees, owners, stockholders, and managers, from and against any and all suits or claims for losses, damages, expenses, personal injuries, or death which might be suffered or sustained by me directly or indirectly as a result of participation in The WorkBack Program.

NOW THEREFORE, BE IT KNOWN THAT I, the undersigned, for and in consideration of the permission granted by the Sponsor and Program Manager to me perform services for the Sponsor during a normal work day and through The WorkBack Program, do hereby assume all responsibility for any injuries, or death which I might suffer or sustain, for said purpose, while in a building, or on any property or premises owned or operated by the Sponsor, or while otherwise participating in The WorkBack Program; and, for myself, my heirs, executors, and administrators or other persons claiming under or through me, I do hereby release and forever quit claim and discharge the said Sponsor and Program Manager, and its or their officials, directors, employees, owners, stockholders, and managers from and against any and all claims, suits or demands, which I, or my heirs, executors or administrators, or other persons claiming under or through me, have, or can or might have as result of any losses, damages, expenses, personal injuries, or death which I, or any persons whosoever claiming under or through me, may suffer or sustain while exercising said permission, in any motor vehicle, in any building, or on any property or premises owned or operated by the Sponsor, or while otherwise participating in The WorkBack Program, whether said losses, damages, personal injuries or death result from the negligence, except gross negligence, of the said Sponsor and Program Manager, and its or their officials, directors, employees, owners, stockholders, and managers or are otherwise caused, except those caused by the intentional acts of the Sponsor or Program Manager.

IN WITNESS WHEREOF and, intending to be legally bound thereby, the undersigned affixes his hand at _____ [Your City and State] this _____ day of _____, 20__.

(Volunteer Signature and Date)

Volunteerr Printed Name)

(Volunteer Address)

(if married, Spouse's Signature)

(if under age 18, Parent's Signature)

Sex: M__ F__ Date of Birth _____

(Work Sponsor Authorizing Signature)

Program Mgr. Authorizing Signature)

CASE MANAGEMENT

CREATING A PLAN FOR CHANGE THROUGH COVENANTAL COMMITMENT

When is a case management program appropriate? This book will help you assess the needs, gifts, calling, and hopes of the participant; develop a Development Covenant between mentor and participant; and follow up and evaluate the process.

This book is part of the *Communities First* series, designed to help churches and Christians bring unique gifts to their neighborhoods and communities. Combined with consultation, these materials will help you engage with your community and influence it in ways that will make life better for everyone here and now. As a result, you will see your community respond and change in surprising and redemptive ways. The Church and God's Kingdom will grow.

In addition to the cornerstone book simply titled *Communities First*, other workbooks include:

The Theology of Development: A Biblical Understanding of Christian Mission and Community Development

Through God's Eyes, With God's Heart: Building Readiness for Community Ministry

Meeting Needs: Moving from Relief to Individual Development

Case Management: Creating a Plan for Change through Covenantal Commitment

Developing a Community Vision

Community Strengthening

Community Organizing

Justice: Creating Policies, Laws and Systems that Work for Everyone



Center on
FAITH IN COMMUNITIES



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CHRISTIAN REFORMED
WORLD RELIEF COMMITTEE

Living Justice, Loving Mercy