



New York State Case Management Certificate Training Program 2020-2021

**Evaluation Report from Boston University
December 2021**



**Center for Aging and Disability
Education and Research**
Boston University School of Social Work

I. INTRODUCTION

The Center for Aging and Disability Education and Research (CADER) is dedicated to bringing evidence-based research into practice through workforce innovation in the aging and the disability fields. Located at Boston University School of Social Work, CADER builds upon the School's long-standing history and commitment to aging and disability research and practice.

CADER programs and courses apply a competency-focused approach to comprehensive training, committed to enhancing the skills of practitioners in the field at all levels of experience. Health and human service practice with older adults and people with disabilities is complex and requires competence, professional judgment, and critical thinking to translate knowledge, skills, and values into effective practice behaviors.

This report presents the findings from an annual evaluation of participant completion rates, competency-based self-assessments at certificate enrollment, following certificate completion, and learner feedback on whether the course met learning objectives. Information was collected for the enrollment period of November 1, 2020 to October 31, 2021.

II. NEW YORK CASE MANAGEMENT CERTIFICATE PROGRAM

Overview

The New York Case Management Certificate program provides learners with an in-depth understanding of the core functions and responsibilities of care management and care coordination, an introduction to care transitions, and a review of the resources available to support care in the community integral to person-centered care. It consists of a five (5)-course, 20-hour online training encompassing the following courses:

1. Core Issues in Aging and Disability
2. Assessment with Older Adults and Persons with Disabilities
3. A Guide to the Aging and Disability Networks
4. Care Management
5. Care Transitions

Enrollment was mandatory for new hires within 5 months of their hire date. Other learners were completing re-certification. CADER provided course management support (program registration and technical support including individual monthly follow-ups with learners, course completion reminders and technical troubleshooting) in addition to providing monthly progress reports to NYSOFA leadership.

Certificate Participation

A total of 118 learners enrolled in the New York State Case Management Certificate between November 1, 2020 and October 31, 2021 out of 130 expected learners. Overall, 108 staff completed the program, resulting in a 93% completion rate. Completers were defined as individuals who participated in all five courses and achieved a score of at least 80% on each of the five course quizzes to be eligible for the certificate.

Methods

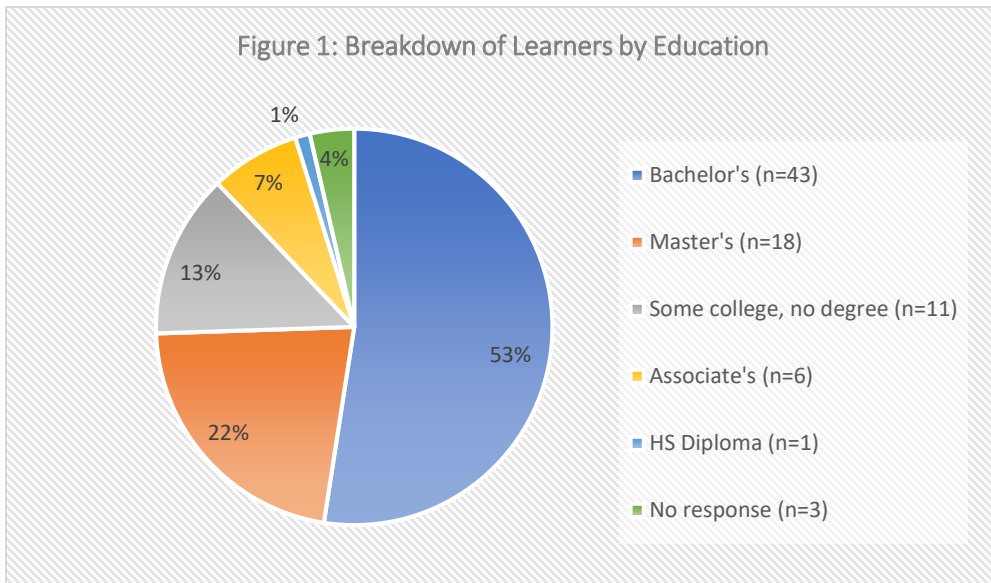
Results are reported for the following data collected in the upcoming sections. Data were collected through the following tools:

- *Online Enrollment Registration Form*: Learners were asked to provide demographic information including gender, race/ethnicity, highest level of education completed, and job title upon course registration. Demographic data was not collected from 28 participants who were re-certified (25.5% of overall completers) this evaluation period as some participants were enrolled manually due to changes in the online registration process. This process has been remedied for future participants.
- *Pre-Course Assessment and Post-Course Competency Evaluation*: At the beginning and end of each course, participants were asked to rate their skill level in various competencies using the following scale: 0 - Not skilled at all; 1 - Beginning skill; 2 - Moderate skill; 3 - Advanced skill; 4 - Expert skill.
- *Learning Outcomes Questionnaire*: At the end of each of the courses, participants were asked whether they felt that the training met the learning objectives and benefited their practice. Participants rated their satisfaction level with each course using a scale of one to five (1- Strongly disagree; 2- Disagree; 3- Neutral; 4- Agree; 5- Strongly agree).
- *Course Evaluation Questionnaire*: At the end of each of the courses, participants were asked to complete a course evaluation to share their thoughts on the quality of the course and course support experience using a scale of one to six (1- Strongly disagree; 2- Disagree; 3- Neutral; 4- Agree; 5- Strongly agree; 6- Non-applicable).

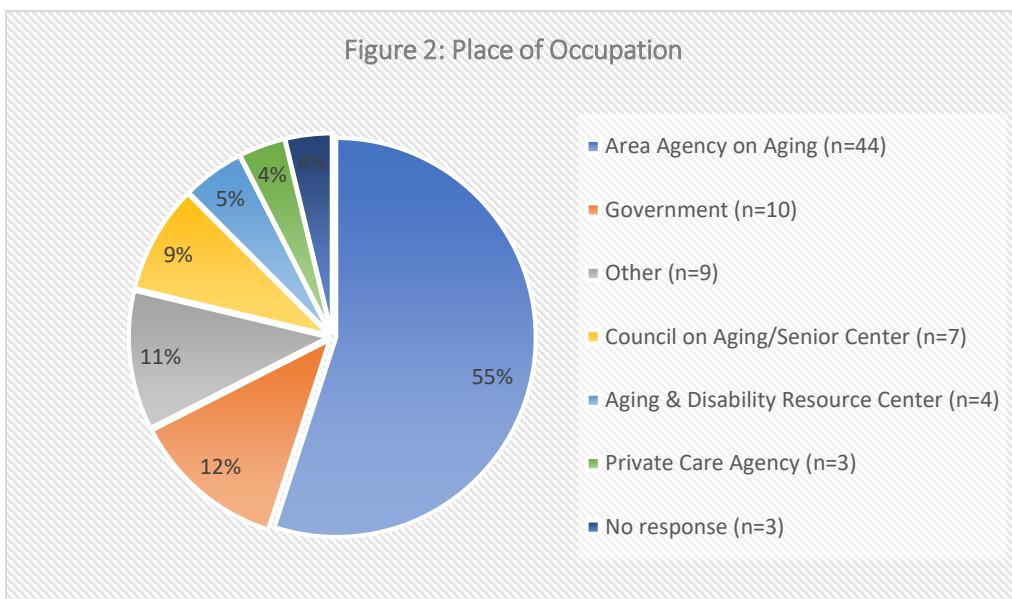
Learner Profile

Of the learners who completed the certificate program the majority identified as White, were college educated females, and almost a third were in the 25-40 age range. Most learners worked at an Area Agency on Aging employed as a caseworker or case manager. More details follow:

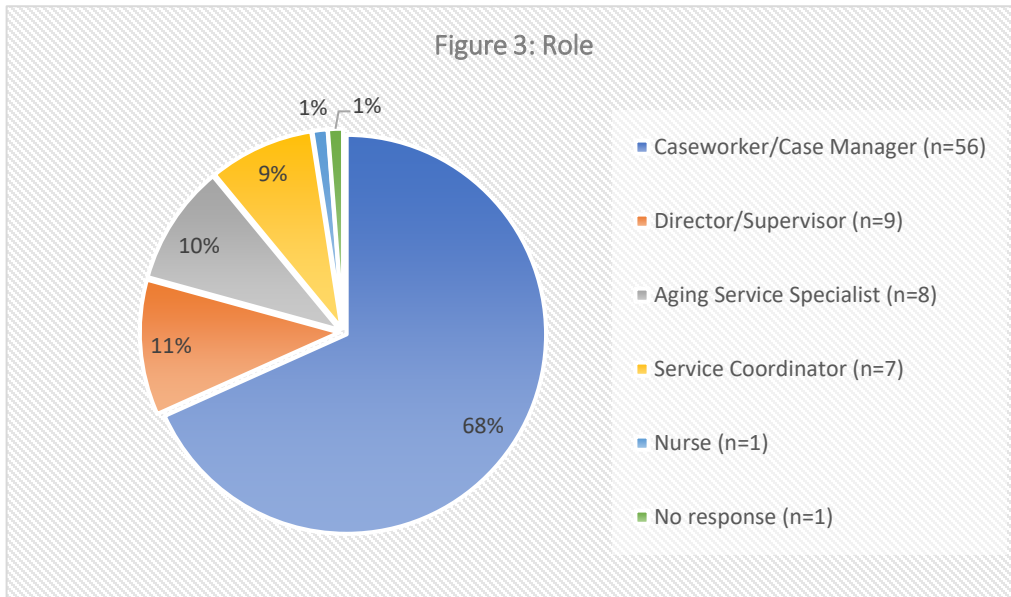
- Race/ethnicity: Most learners identified as White (74.4%, n=61), 11% (n=9) identified as Black, 3.7% (n=3) identified as American Indian or Alaskan native.
- Gender: Most learners identified as women (79.3%, n=65); 13.4% (n=11) identified as men, 1.2% (n=1) identified as genderqueer and 6.1% (n=5) declined to answer.
- Age: Most learners were in the 24-40 age range (34.1%, n=28). The breakdown of age is as follows:
 - Under 25 years: 4.9% (n=4)
 - 25-40 years: 34.1% (n=28)
 - 41-55 years: 31.7% (n=26)
 - 56-65 years: 17.1% (n=14)
 - 65+ years: 6.1% (n=5)
 - Declined to answer: 2.4% (n=2)
- Education: 74.4% (n=61) of learners indicated they had a Bachelor’s degree or higher. The breakdown of education attainment for learners was as follows (see Figure 1).



- Place of Occupation: Learners mostly worked at Area Agencies on Aging (53.7%, n=44) (see Figure 2).



- Role: Learners were primarily employed as case workers or case managers (68.3%, n=56) (see Figure 3).



Analysis

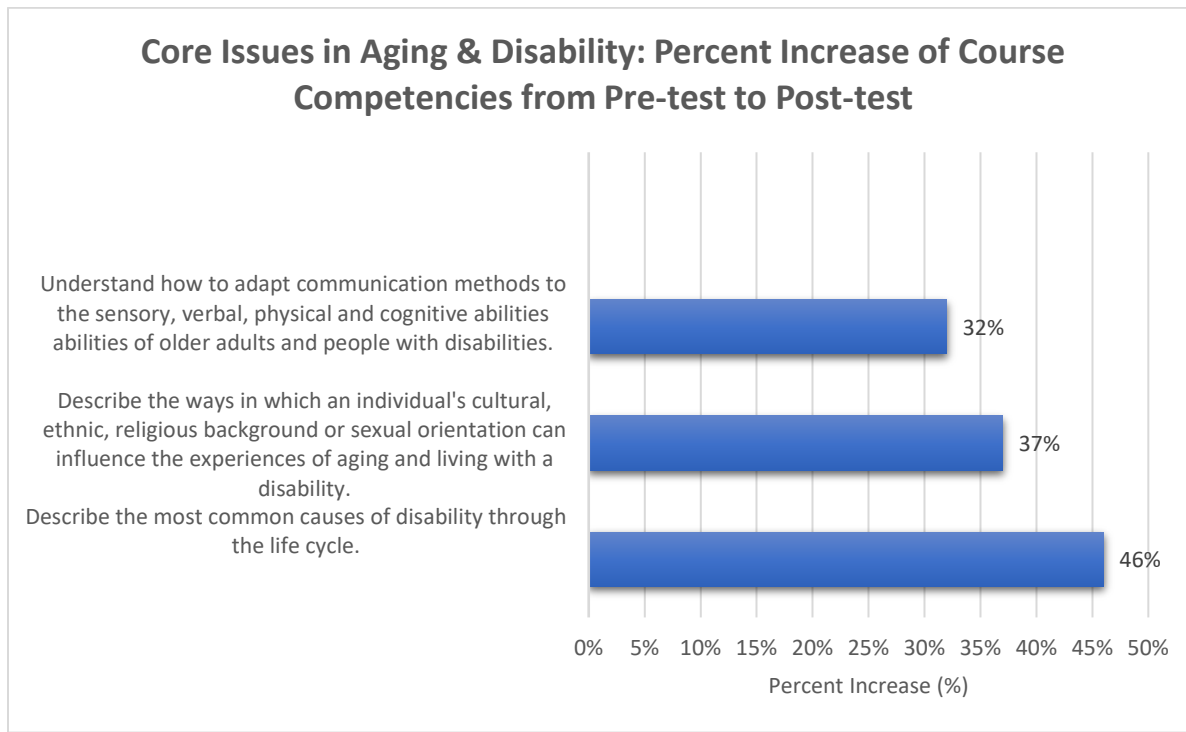
Statistically significant increases in the mean self-reported skill levels from pre-test to post-test were observed across all of the learning competencies. Care Transitions and A Guide to the Aging and Disability Networks were the courses that showed the greatest increase in competencies. All increases are displayed in the prospective figures for each course below.

Course One: Core Issues in Aging and Disability

This course provided an overview of issues related to aging and disability, available resources and programs, as well as introducing learners to consumer choice and person-centered care.

Of the 118 learners who enrolled in the *NY Case Management Certificate Program*, 115 completed both the pre and post-course self-assessments of competencies for this course. Increases in mean scores from pre-test to post-test ranged from 20% to 46% (p. < 0.05) across all eight (8) learning competencies. [See *Table 1* for the three competencies with the greatest percent increases in mean score.]

Table 1



The following are results based on the course evaluation data collected after each course related to course content, learning objectives, and skills gained from the course:

- Ninety-seven percent (97.4%; n=111) of learners agreed or strongly agreed that the training **expanded their knowledge and understanding of the topic area.**
- Ninety-six percent (95.6%; n=109) of learners agreed or strongly agreed that the training **will help them apply practice skills in the topic area.**
- Almost ninety-seven percent (96.5%; n=110) of learners agreed or strongly agreed that the training met the following learning objective: **demonstrate knowledge of resources and programs that support older adults and persons with disabilities.**
- Almost ninety-seven percent (96.5%; n=110) of learners agreed or strongly agreed that the training met the following learning objective: **describe the philosophy of consumer choice.**

Learners also included positive feedback about their experience in the course. Eighty percent (80.7%; n=92) of learners agree or strongly agreed that they would recommend this course to colleagues.

Course content: The course provided useful knowledge for advanced practitioners in the field as well as learners who were entering the field of aging for the first time. A learner noted that it was an "excellent training for individuals entering the field of senior services," and another noted the course "broadened my perspective in approaching clients holistically." Learners also mentioned that the course was a "very thorough introduction" and a "good overview of what to expect when working with

elders.” Many enjoyed learning about the history behind the legislation and policies that led to the creation of programs and found it to be illuminating in providing context for available resources. Many learners mentioned the importance of knowing “information regarding Self Determination, Consumer Choice, and Person-Centered Care” to provide agency for clients in their care.

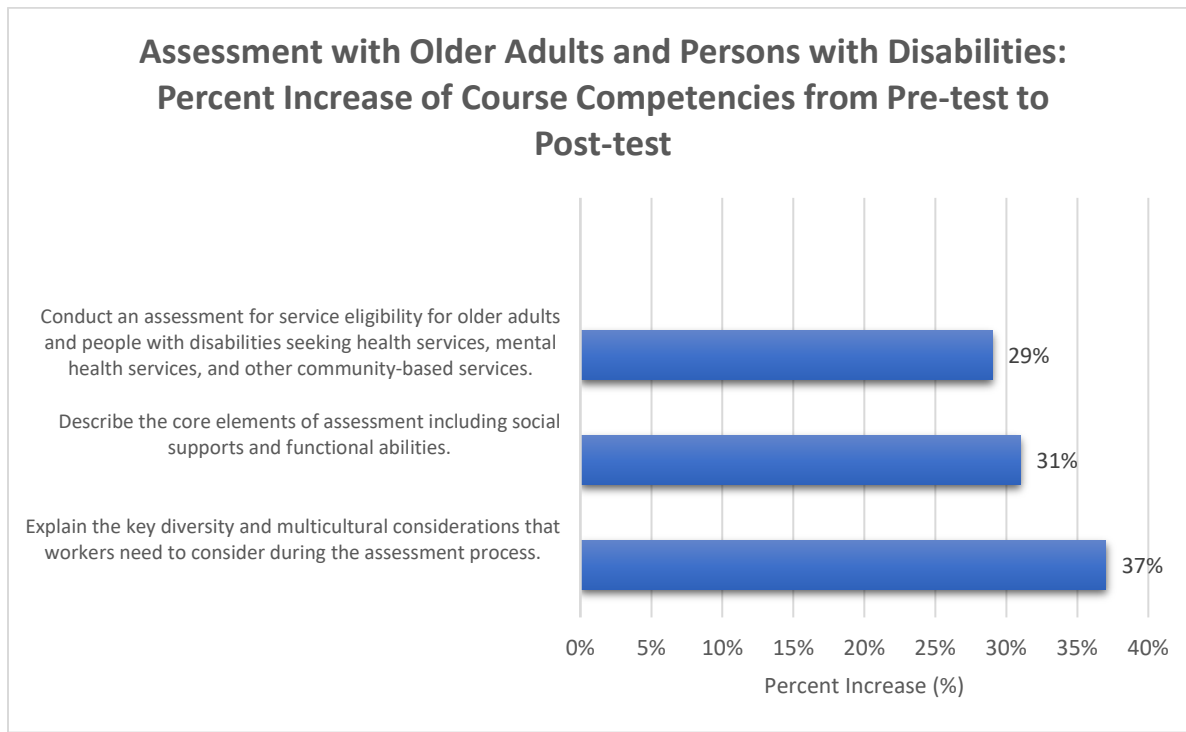
Practice implications: Learners felt empowered by the knowledge imparted by the course. Many mentioned that the knowledge learned would be highly “usable in [their daily duties].” Many learners mentioned the importance of providing person-centered care, and using the information learned “to present options...and be more understanding of barriers,” and “to continue to increase the amount of choice consumers have in their care plans.” Learners felt that they could be more effective advocates through providing appropriate accommodations for clients and “to take account clients’ [needs] not just [the] process” in addition to gaining tools and skills to “focus on a client’s right to self-determination and be an advocate more for [the] client against possibly doctors and family members who are just telling client what to do.” Learners also found the resources provided in the course immensely helpful and were eager to learn more about the locally available resources and services to provide effective care for clients.

Course Two: Assessment with Older Adults and Persons with Disabilities

The course provided an overview of assessment, the process that unfolds as the worker and consumer work together to find solutions to the consumer’s long-term services and support needs, and emphasized importance of engaging in a partnership with clients during the process

Of the 118 enrolled learners in the *NY Case Management Certificate Program*, 110 learners completed both the pre and post-course competency assessments for the *Assessment with Older Adults and Persons of Disabilities* course. Increases in mean scores from pre-test to post-test ranged from 22% to 37% ($p < 0.05$) across all nine (9) learning competencies. [See *Table 2* for the three competencies with the greatest mean increases.]

Table 2



The following are results based on the course evaluation data collected after each course related to course content, learning objectives, and skills gained from the course:

- Ninety-six percent (95.6%; n=105) of learners agreed or strongly agreed that this course met the following learning objective: **consider the diversity of consumers using cultural humility.**
- Ninety-six percent (95.6%; n=109) of learners agreed or strongly agreed that the training **will help them apply practice skills in the topic area.**
- Ninety-six percent (95.6%; n=109) of learners agreed or strongly agreed that this course met the following learning objective: **explain the role of the consumer as partner in assessment.**
- Ninety-six percent (96.3%; n=105; missing: n=1) of learners agreed or strongly agreed that this course met the following learning objective: **explain how the assessment process supports choice, self-determination, and participation.**
- Ninety-five percent (95.4%; n=105) of learners agreed or strongly agreed that the training **expanded their knowledge and understanding of the topic area.**

Many learners reported positive experiences with this course. Participants noted that the course was current and relevant. Eighty-two percent (82.1%; n=87; missing: n=4) of learners agree or strongly agreed that they would recommend this course to colleagues.

Course content: Learners noted that the "information was extremely helpful. This really puts meat on the bones of case management." Learners remarked that the course provided effective examples of

how to interact in different ways with clients. "Learning that the client is a partner in the assessment" and the focus on cultural humility provided learners with tools to help practitioners gain deeper self-awareness into personal biases that may affect the assessment process. A learner mentioned that the course allowed them to be "more aware of the client, looking at their life, needs in a multifaceted dimension."

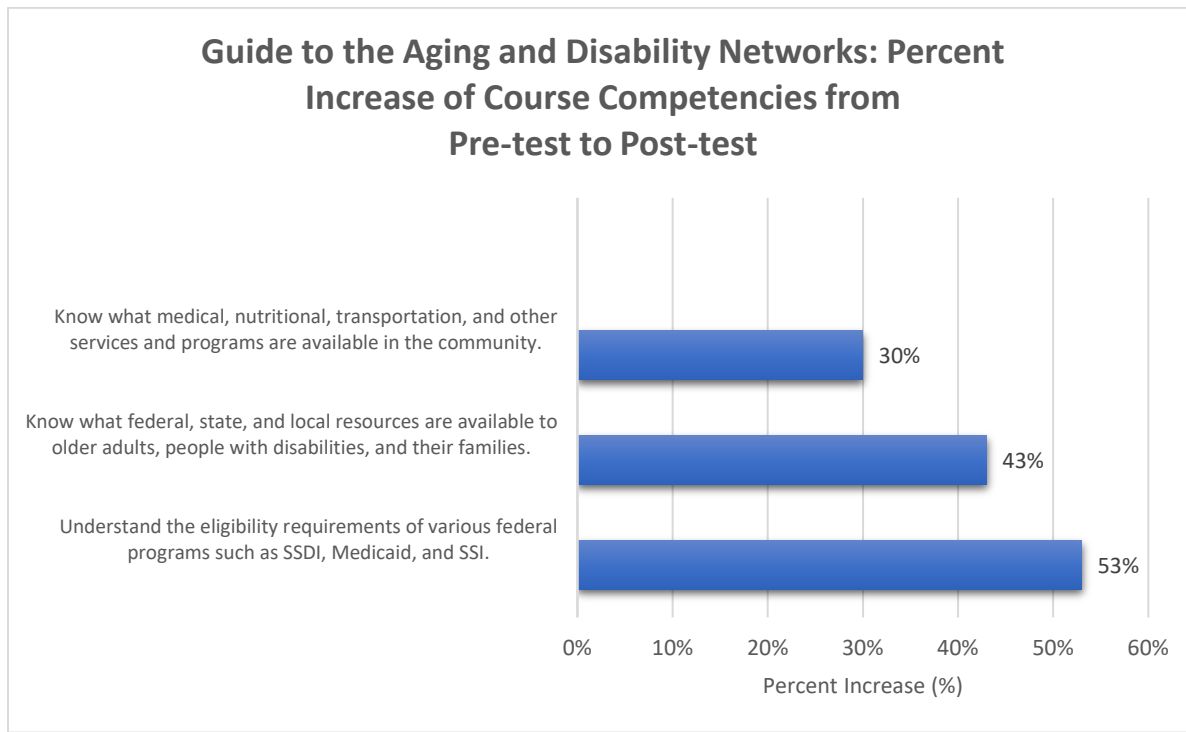
Practice implications: This course impacted learners in many ways. It increased their confidence with assessments by giving them tools such as active listening and allowed them to engage in self-reflection. Feedback included that learners will "be more aware of any biases I may have and how they may be affecting my assessments with clients." Another noted the importance of "being more mindful of my own personal beliefs or biases when working with clients, especially when entering their homes. Holding judgment of their choices and instead searching for cooperative solutions that would interest them." Others noted the importance of establishing trust and using the assessment to be "more of a conversation rather than going through all the questions in a certain order." A learner noted how this course made them "plan on continuing to educate myself on my own time, as this course reminded me how important it is to stay up to date on all information pertaining to social work."

Course Three: A Guide to the Aging and Disability Networks

The course provided learners with knowledge on how to identify and access key federal, state, and local resources available to older adults, persons with disabilities, and their families.

Of 118 learners enrolled in the *NY Case Management Certificate Program*, 112 completed both the pre and post-course assessments of competencies for this course. Increases in mean scores from pre-test to post-test ranged from 24% to 53% ($p < 0.05$) across all six (6) learning competencies. [See *Table 3* for the three competencies with the greatest increases in mean scores.]

Table 3



The following are results based on the course evaluation data collected after each course related to course content, learning objectives, and skills gained from the course:

- Ninety-six percent (95.5%; n=107) of learners agreed or strongly agreed that **this training will help them apply practice skills in the topic area.**
- Ninety-six percent (96.4% n=108) of learners agreed or strongly agreed that this course met the following learning objective: **discuss methods for identifying and accessing resources for older adults and their families.**
- Ninety-five percent (94.6%; n=105; missing: n=1) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**

Learners noted the importance of this course for effective practice. Eighty-five percent (84.6%; n=94) of learners agree or strongly agreed that they would recommend this course to colleagues.

Course content: One learner noted that “this is a very valuable and interesting course for the professionals that want to master their abilities and knowledge to support and address the needs of the older population.” Another noted that “I learned about terms I did not know about even though I have specialized in this field.” Learners stated the course provided “great content, relevant to the massive changes going on in our health and social services care systems,” that introduced them to new services and agencies they were previously unaware of. It reiterated the importance of being “very

familiar with the resources available and provided to help.” Learners “became more familiar with all the different resources and insurance [types],” and mentioned that they “ will use this information to assist with planning/ providing appropriate services for clients.”

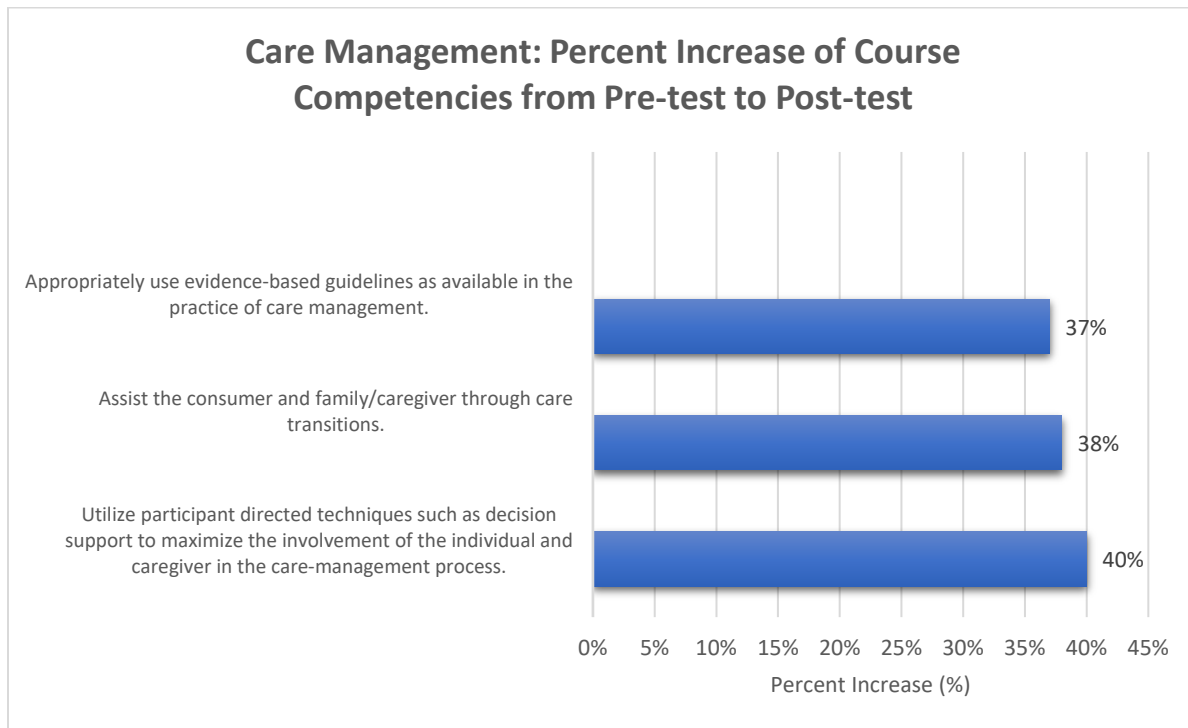
Practice implications: Learners became more aware of the importance of focusing on “long term solutions versus short term fixes” and felt more confident in their ability to assess and provide appropriate referrals to services. Learners found the resources provided in the course extremely helpful and felt they had a better sense of the options available at the federal, state, and local levels. Learners indicated an interest in educating themselves further about local resources available to older adults and adults with disabilities, and that the knowledge gained was extremely applicable to their day-to-day practice.

Course Four: Case Management

This course discusses the role of health and human service workers in care management, the ACA’s impact on care management, and provides an overview of the medical, emotional, and social conditions that affect older people and people with disabilities.

Of the 118 earners enrolled in the *NY State Case Management Certificate Program*, 109 completed both the pre and post-course self-assessment of competencies for the *Case Management* course. Increases in mean scores from pre-test to post-test ranged from 26% to 40% ($p < 0.05$) across all ten (10) learning competencies. [See *Table 4* for the three competencies with the greatest increases in mean scores.]

Table 4



The following are results based on the course evaluation data collected after each course related to course content, learning objectives, and skills gained from the course:

- Ninety-three percent (92.6%; n=100; missing: n=1) of learners agreed or strongly agreed that **this training will help them apply practice skills in the topic area.**
- Ninety-four percent (94.4%; n=102; missing: n=1) of learners agreed or strongly agreed that this course met the following learning objective: **identify the medical, emotional, and social conditions that affect older people and people with disabilities.**
- Ninety-four percent (93.5%; n=100; missing: n=2) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**

Learners noted the importance of this course for effective practice. Eighty-three percent (82.9%; n=87; missing: n=4) of learners agreed or strongly agreed that they would recommend this course to colleagues.

Course content: Learners enjoyed the course's focus on using case examples to illustrate key points in care management. The learners noted that "the course emphasizes the need to a holistic approach to client care," and that they gained "more knowledge about legal tools available to consumers...[to] be able to discuss [clients'] options more clearly and work to protect their rights." Learners felt that the materials were very useful, up to date, and relevant.

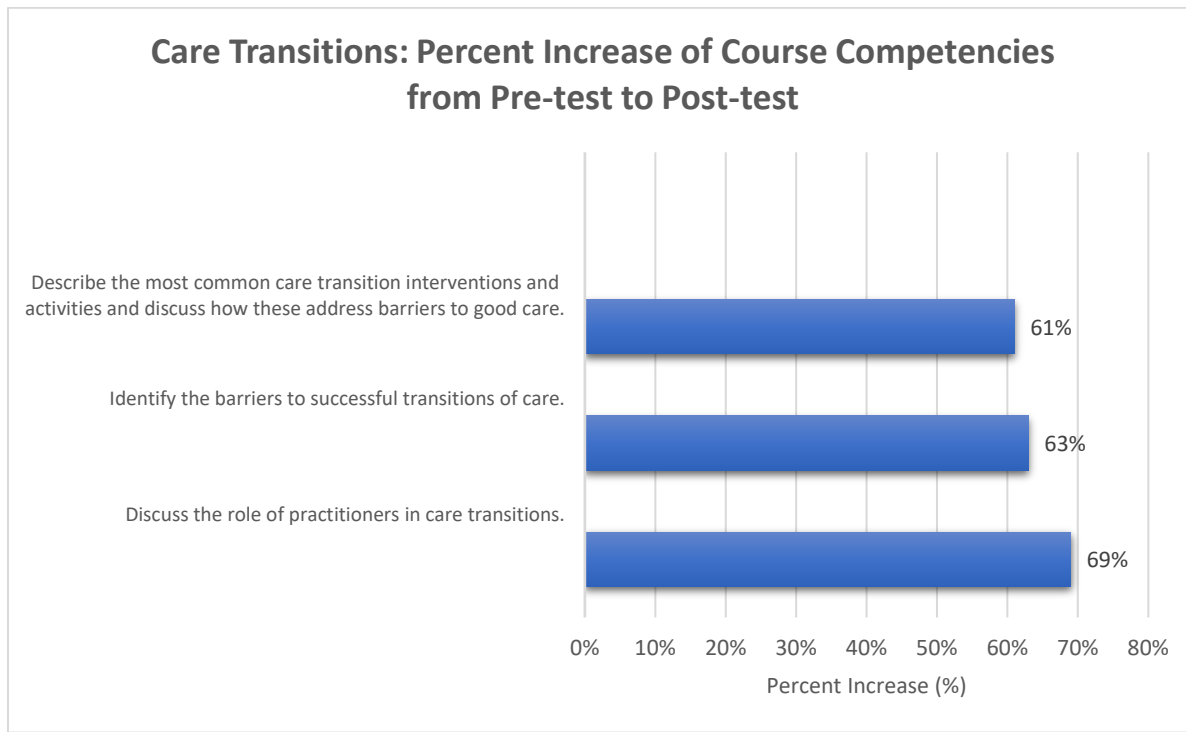
Practice implications: Learners felt strongly that this course expanded their skills to provide client-centered care management services. There was an emphasis on care management using a strengths-based approach, as learners said they will "concentrate on strengths before limitations and problems." In addition, learners noted that they will "Ensured I am listening to the consumer first," and that this course will enable them to "better educate my clients, assure their understanding, and teach back methods." Others noted how they will change their practice: "I plan to better approach care planning. This course helped me to better understand how to develop a plan and what will be best for the consumer."

Course Five: Care Transitions

Care transitions provides learners with the knowledge and skills to provide care transition to clients and families that includes team coordination, cultural humility, and knowledge of barriers to successful transitions of care.

Of the 118 learners enrolled in the certificate program, 109 completed both the pre and post-assessments of course competencies for the *Care Transitions* course. Increases in mean scores from pre-test to post-test ranged from 48% to 69% ($p < 0.05$) across all twelve (12) learning competencies. [See *Table 5* for the three competencies with the greatest increases in mean scores.]

Table 5



The following are results based on the course evaluation data collected after each course related to course content, learning objectives, and skills gained from the course:

- Ninety-two percent (91.7%; n=100) of learners agreed or strongly agreed that **this training will help them apply practice skills in the topic area.**
- Ninety-two percent (91.7%; n=100) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**
- Ninety-five percent (95.2%, n=99; missing: n=5) of learners agreed or strongly agreed that this course met the following learning objective: **explain how culture, ethnicity, and health literacy impact care transitioning.**

Learners found this course particularly helpful to their care planning practice. Eighty-three percent (83.3%; n=90; missing: n=1) of learners agreed or strongly agreed that they would recommend this course to colleagues.

Course content: Learners found the list of tools provided in identifying the various models for care transitions helpful. Learners mentioned “Having increased awareness of transitioning clients as needs change” and felt that they now “[knew] what type of care transition plan might work best for my consumers” as a result of completing the course. Furthermore, learners were made aware of “cultural differences and how that impacts choices made” in the care transition process.

Practice implications: Learners noted that their “approach to consumers will be much more inclusive with knowledge and skills developed from this training course,” and that they felt “better able to

consider cultural differences and able to explain care transitions." They felt more confident in their ability to "thoroughly discuss end-of-life care, and care transitions." Others noted the importance of communication amongst providers and stated they would "utilize more of a team approach to transitioning clients between care levels."

III. SUMMARY

Overall, participants in the NY State Case Management Certificate Program reported that they gained key knowledge and skills from the program relevant to practice as they continue to work with aging and disability populations. Based on data analysis of mean increase in course competencies from pre to post-test and learner feedback, the New York State Case Management Certificate Program was well-received by training participants and helped tremendously in building their knowledge and skills in key content areas and competencies. Of note, participants identified key competencies in cultural humility to bring into practice and the desire to seek additional resources to provide diverse care options for clients in their care. Furthermore, learners provided CADER with important feedback to improve course engagement and enhance outcomes as we continue to refine our courses and continue to grow through the valuable partnership with the New York State Office for the Aging. We look forward to continuing our work with the New York State Office for the Aging to enhance the skillset of this workforce and positively impact the lives of older adults and people with disabilities throughout the state.