



# New York State Case Management Certificate Training Program 2021-2022

**Evaluation Report from Boston University  
August 2023**



**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 disability fields. Located at the 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 learner completion rates, competency-based self-assessments, and learner feedback on whether the course met learning objectives. Information was collected for the enrollment period of November 1, 2021 to October 31, 2022.

## **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. The certificate program is a 20-hour online training program consisting of the following five courses:

1. Core Issues in Aging and Disability
2. A Guide to the Aging and Disability Networks
3. Assessment with Older Adults and Persons with Disabilities
4. Care Management Practice
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 107 learners enrolled in the New York State Case Management Certificate program between November 1, 2021 and October 31, 2022. Overall, 97 learners completed the program, resulting in a 91% program completion rate. The 97 learners who completed the program either completed the certificate courses (n= 75) or tested out (n=22). Learners who completed the certificate courses participated in all five courses and achieved a score of at least 80% on each of the five course quizzes.

### ***Methods***

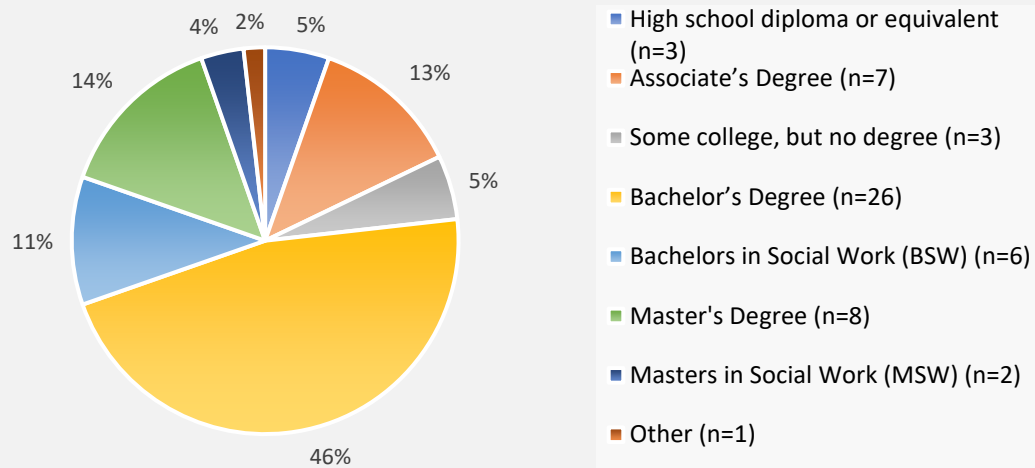
Data were collected through the following tools:

- *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. 56 learners provided demographic data. Demographic data was not collected from learners who were manually enrolled in the course.
- *Pre-Course and Post-Course Competency Self-Evaluation:* At the beginning and end of each course, learners 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 course, learners were asked whether they felt that the training met the learning objectives. Learners rated whether the course met objectives 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 course, learners 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).

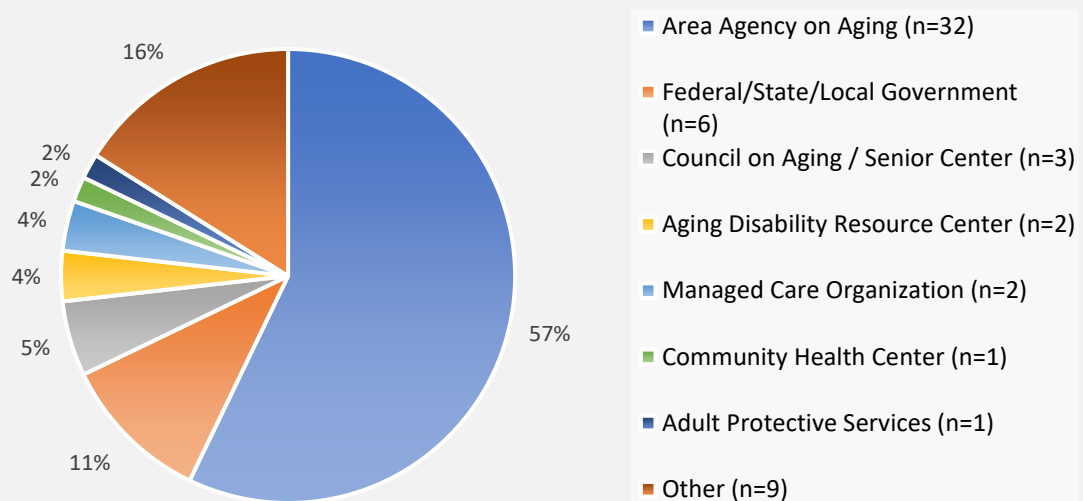
## ***Learner Profile***

Of the 56 learners who completed the certificate program and provided demographic data, the majority identified as White, were college-educated women, and were in the 41-55 age range. Most learners worked at an Area Agency on Aging employed as a caseworker or case manager. More details follow:

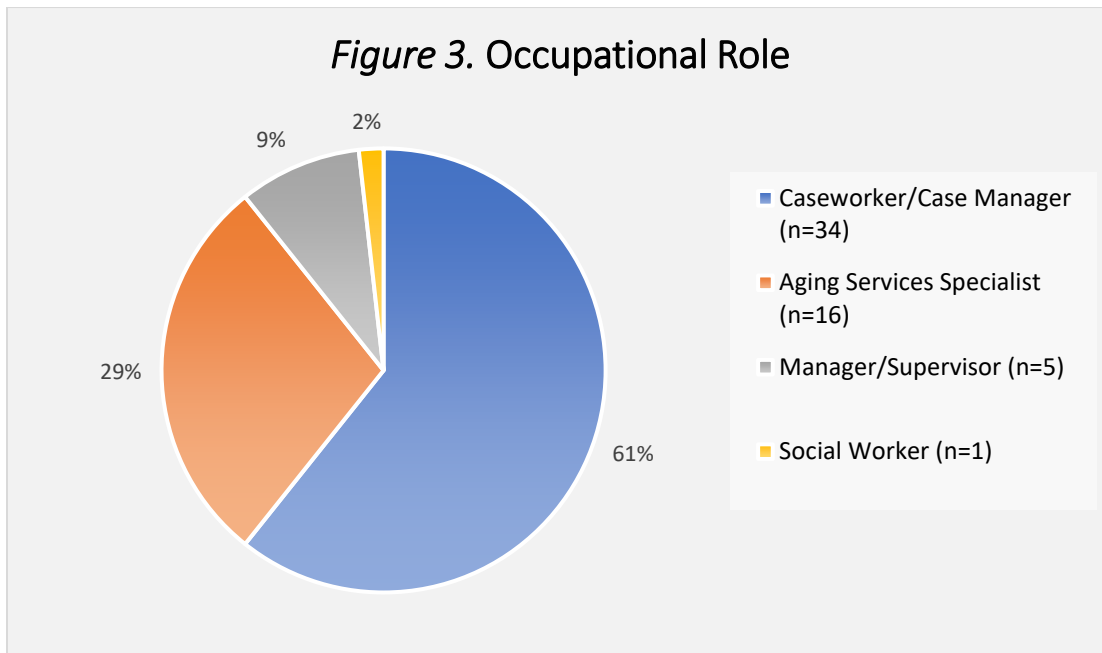
- **Race/ethnicity:** Most learners identified as White (82%, n=46); 7% (n=4) identified as Black or African American, 5% (n=3) selected Other, and 5% (n=3) declined to answer.
- **Gender:** Most learners identified as women (88%, n=49); 11% (n=6) identified as men and 2% (n=1) declined to answer.
- **Age:** The breakdown by age was as follows:
  - Under 25 years: 4% (n=2)
  - 25-40 years: 30% (n=17)
  - 41-55 years: 45% (n=25)
  - 56-65 years: 16% (n=9)
  - 65+ years: 2% (n=1)
  - Declined to answer: 4% (n=2)
- **Education:** 75% (n=42) of learners indicated that they had a Bachelor's degree or higher. See *Figure 1* for the breakdown by educational attainment.

**Figure 1. Breakdown of Learners by Education**

- Place of Occupation: Learners mostly worked at Area Agencies on Aging (57%, n=32) (see Figure 2).

**Figure 2. Place of Occupation**

- Occupational Role: Learners were primarily employed as caseworkers or case managers (61%, n=34) (see Figure 3).



### **Analysis**

Statistically significant increases in the mean self-reported skill levels from pre-course to post-course were observed across all of the learning competencies. Care Transitions was the course that showed the greatest increase in competencies. See details by course below.

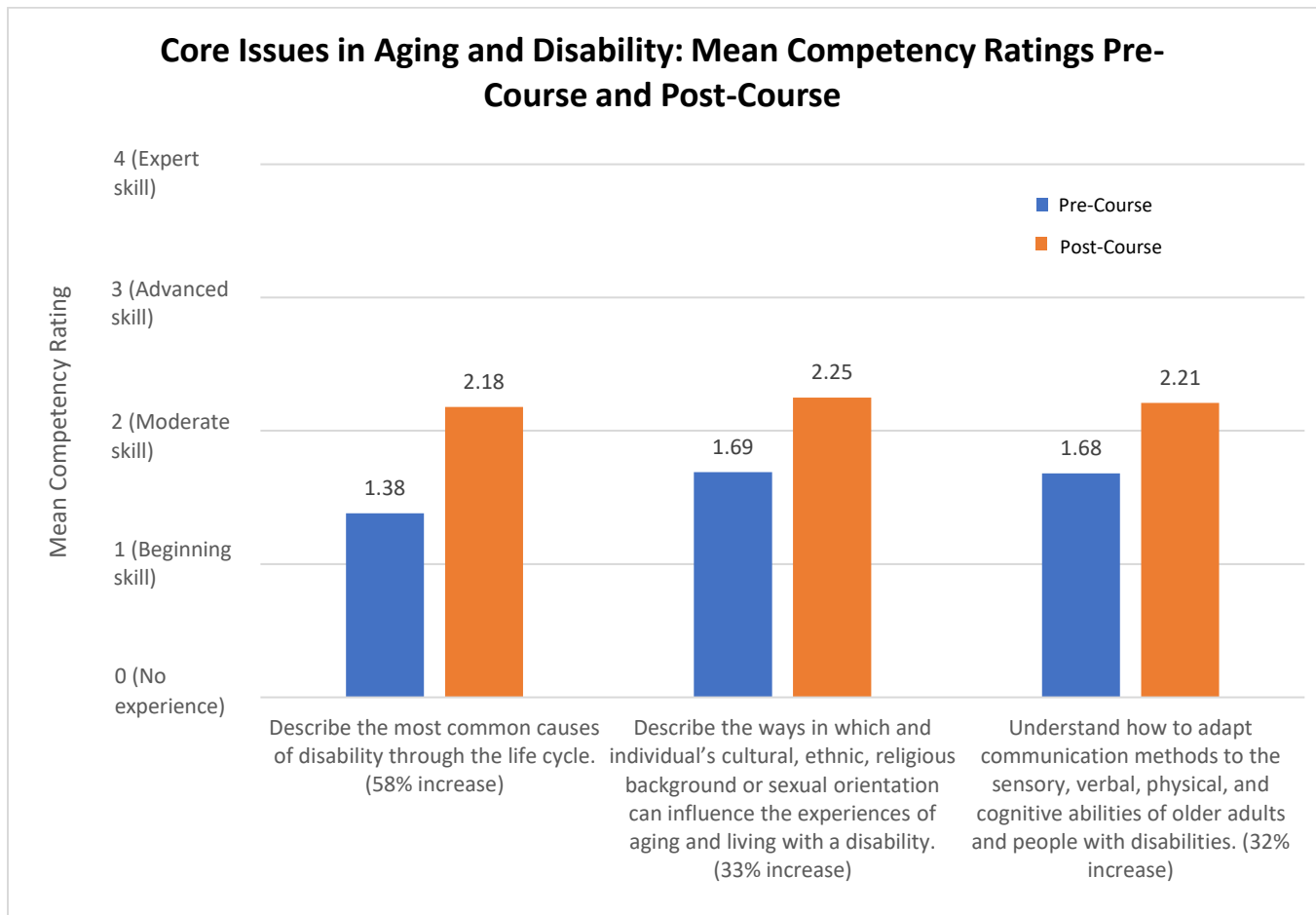
### **Course One: Core Issues in Aging and Disability**

This course provided an overview of issues related to aging and disability, laws and public policies that support aging, as well as introduced learners to consumer choice and person-centered care.

The combined mean competency rating across all eight competencies increased from 1.70 on the pre-course competency self-assessment to 2.22 on the post-course competency self-assessment, a 31% increase.

For each of the eight competencies, mean scores significantly increased ( $p < 0.05$ ) from the pre-course competency self-assessment to the post-course competency self-assessment. Percent increases ranged from 25% to 58%. *Figure 4* shows mean competency ratings for the three competencies with the greatest percent increases.

Figure 4



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

- Almost ninety-five percent (94.7%; n=71) of learners agreed or strongly agreed that the training **expanded their knowledge and understanding of the topic area.**
- Ninety-two percent (92%; n=69) of learners agreed or strongly agreed that the training **will help them apply practice skills in the topic area.**
- Eighty-nine percent (89.3%; n=67) 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-one percent (90.7%; n=68) of learners agreed or strongly agreed that the training met the following learning objective: **define functional capacity in terms of activities of daily living.**

Eighty-eight percent (87.8%; n=65, missing n=1) of learners agreed or strongly agreed that they would recommend this course to colleagues.

**Course content:** Many learners noted that the course was informational, in-depth, and provided useful information. One learner said that the course material *“was presented in a very organized and was easy to understand. I was impressed with the amount of information included in this course and how applicable it is for my line of work.”* Multiple learners commented that the videos depicting real life client situations were helpful in considering how to deal with these situations. Learners also thought that the information on consumer choice and self-determination was particularly important. One learner said that the course *“was enlightening about disabilities and importance of consumer choice, self-determination, and participation.”*

**Practice implications:** Learners reported that they will apply what they learned in the course to their jobs. Learners felt inspired to be more **mindful, sensitive, understanding, and respectful of the needs of older adults**. One learner said that the course reminded them of the importance of putting *“yourself in the other person’s shoes to better understand their specific needs.”* Many learners mentioned the importance of providing person-centered care and supporting consumer choice. One learner was eager to empower clients *“to let their needs and wants known to me and community organizations.”* One learner said that they will *“be sure client shares his/her story rather than caregiver.”* Learners expressed motivation to work *“with [clients] to create a care plan”* that fits the client’s wishes.

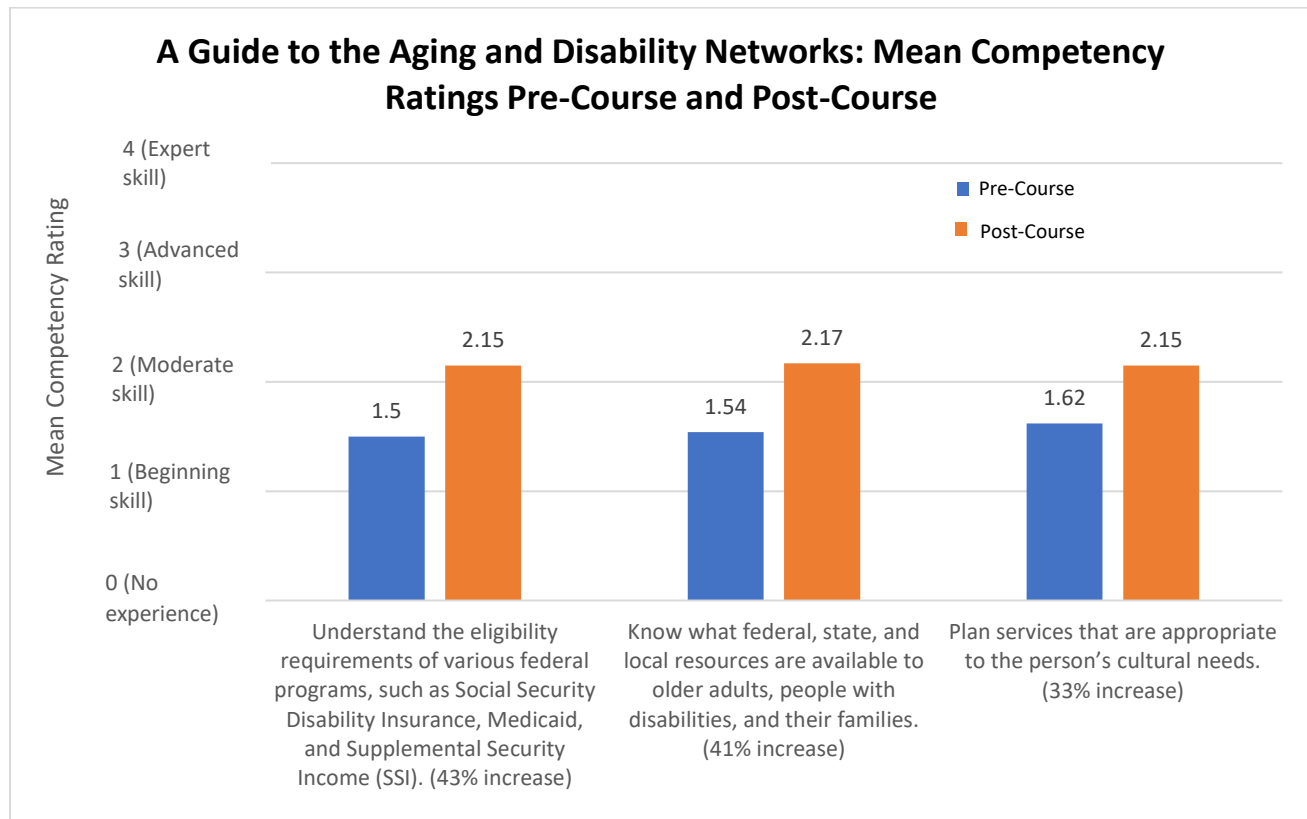
### ***Course Two: A Guide to the Aging and Disability Networks***

This 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.

The combined mean competency rating across all six competencies increased from 1.73 on the pre-course competency self-assessment to 2.22 on the post-course competency self-assessment, a 28% increase.

For each of the six competencies, mean scores significantly increased ( $p < 0.05$ ) from the pre-course competency self-assessment to the post-course competency self-assessment. Percent increases ranged from 17% to 43%. *Figure 5* shows mean competency ratings for the three competencies with the greatest percent increases.

Figure 5



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

- Ninety-two percent (91.9%; n=68, missing n=1) of learners agreed or strongly agreed that **this training will help them apply practice skills in the topic area.**
- Almost ninety-five percent (94.6%; n=70, missing n=1) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**
- Almost ninety-five percent (94.6% n=71) 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-six percent (96%, n=72) of learners agreed or strongly agreed that this course met the following learning objective: **explain how eligibility and accessibility impact the use of federal, state, and local programs.**

Eighty-nine percent (89.2%; n=66, missing n=1) of learners agreed or strongly agreed that they would recommend this course to colleagues.

**Course content:** Learners commented that the course content was very informative and comprehensive, particularly in regards to the information on “*federal, state and local resources*” and “*services and programs*” available to assist older adults. Learners noted that prior to taking the course,



they were unaware of the *“many agencies available to help the aging and disabled population.”* After taking the course, they felt enlightened and better equipped to serve their clients. One learner noted that the course ***“was a good review of options, services and supports available to the people I work with every day.”*** Many learners found the *“historical information on agencies beginnings and laws passed”* helpful, along with the guidelines on *“being eligible for Medicaid and Medicare.”*

**Practice implications:** The knowledge gained in this course was extremely applicable to learners’ day-to-day practice. One learner said ***“I thought this was an informational and knowledgeable class and feel it helped me get a better understanding on how to preform in my position and what services are available to assist me in assist[ing] others.”*** Another learner noted *“I will be taking the information that I learned and incorporate[ing] it into my practice.”* After taking the course, learners felt prepared to *“utilize every possible care source for clients.”* Learners even intended to create ***“a resource binder of things learned for access when assisting seniors”*** and ***“a cheat sheet with services available in the area.”*** Gaining knowledge of services and resources will help learners connect older adults and adults with disabilities to services, as one learner noted: *“I anticipate making the correct connection with the person needing the service and making the right referral.”*

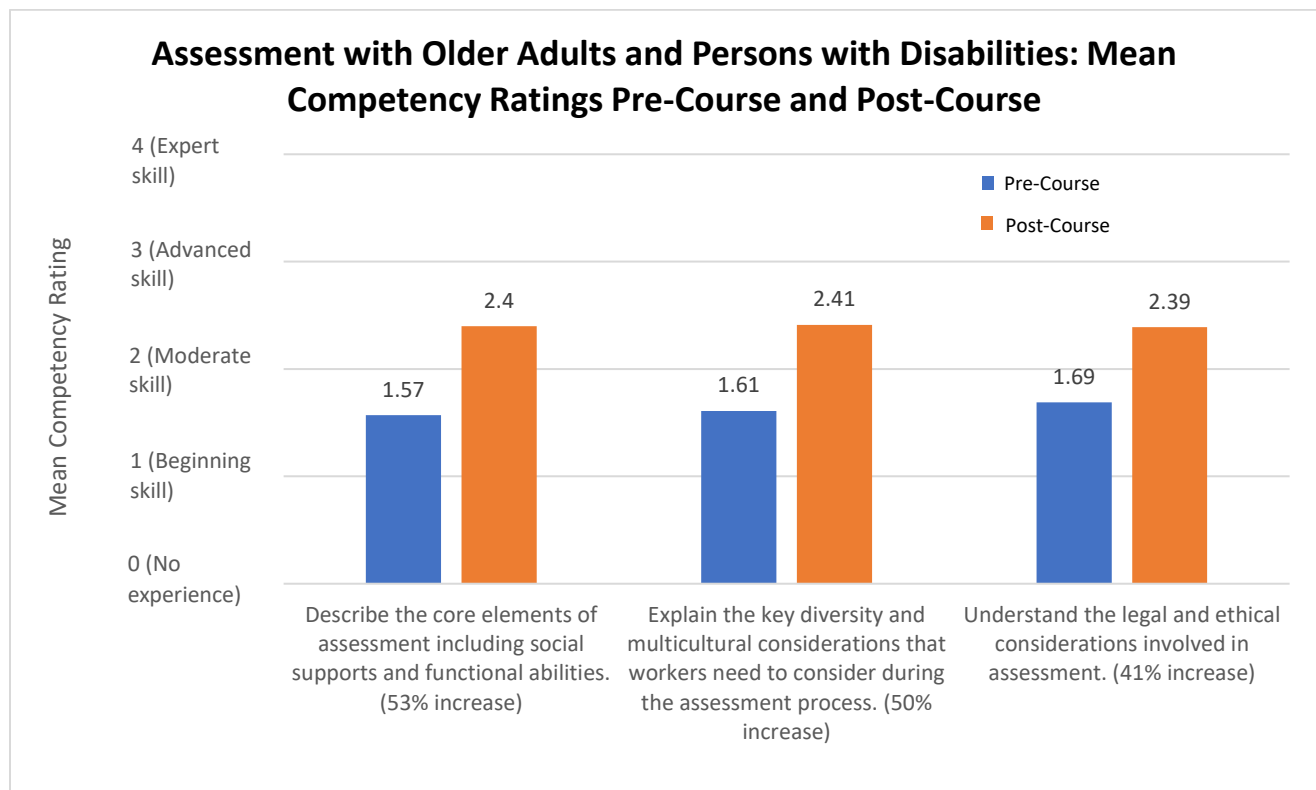
### **Course Three: Assessment with Older Adults and Persons with Disabilities**

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 the importance of engaging in a partnership with clients during the process.

The combined mean competency rating across all nine competencies increased from 1.86 on the pre-course competency self-assessment to 2.48 on the post-course competency self-assessment, a 33% increase.

For each of the nine competencies, mean scores significantly increased ( $p < 0.05$ ) from the pre-course competency self-assessment to the post-course competency self-assessment. Percent increases ranged from 21% to 53%. *Figure 6* shows mean competency ratings for the three competencies with the greatest percent increases.

Figure 6



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

- Almost ninety-five percent (94.5%; n=69, missing n=2) of learners agreed or strongly agreed that the training **will help them apply practice skills in the topic area.**
- Ninety-seven percent (97.3%; n=72, missing n=1) of learners agreed or strongly agreed that the training **expanded their knowledge and understanding of the topic area.**
- Almost ninety-nine percent (98.6%; n=74) of learners agreed or strongly agreed that this course met the following learning objective: **explain the role of the consumer as partner in assessment.**
- Almost ninety-nine percent (98.6%; n=74) of learners agreed or strongly agreed that this course met the following learning objective: **consider the diversity of consumers using cultural humility.**

Almost eighty-eight percent (87.8%; n=65; missing n=1) of learners agreed or strongly agreed that they would recommend this course to colleagues.

**Course content:** Learners noted how valuable the historical content and context was to their understanding of assessment and assessment standards. One learner appreciated the *“history/timeline of how civil rights evolved”* while another appreciated the *“examples of court cases.”* Learners

described the course as highly interactive and appreciated the use of videos, case studies, and real-life examples. One learner stated that videos provided *“effective portrayals of common scenarios [that] helped make the material more tangible, especially the portrayal of the social worker talking with an older woman about her son and issues of elder abuse.”*

**Practice implications:** The course expanded learners’ *“knowledge and understanding”* of the *“process of completing an assessment.”* One learner said, ***“I am building skills to better support the choice and autonomy of people living with dementia.”*** Multiple learners noted that they are now committed to becoming active listeners. Additionally, becoming more self-reflective and paying attention to personal biases and assumptions emerged as a theme in many learner’s responses. Learners also commented on cultural competency, with one learner stating that they intended to become *“more educated on the different cultures, just gather more information and ask more questions.”* Other learners felt encouraged to improve the cultural competency of staff in their workplaces. A learner summarized how they intend to apply what they learned in the course to their practice: ***“Always be sure that the client takes an active part in the assessment. Respect differences, be aware of bias, and listen attentively.”***

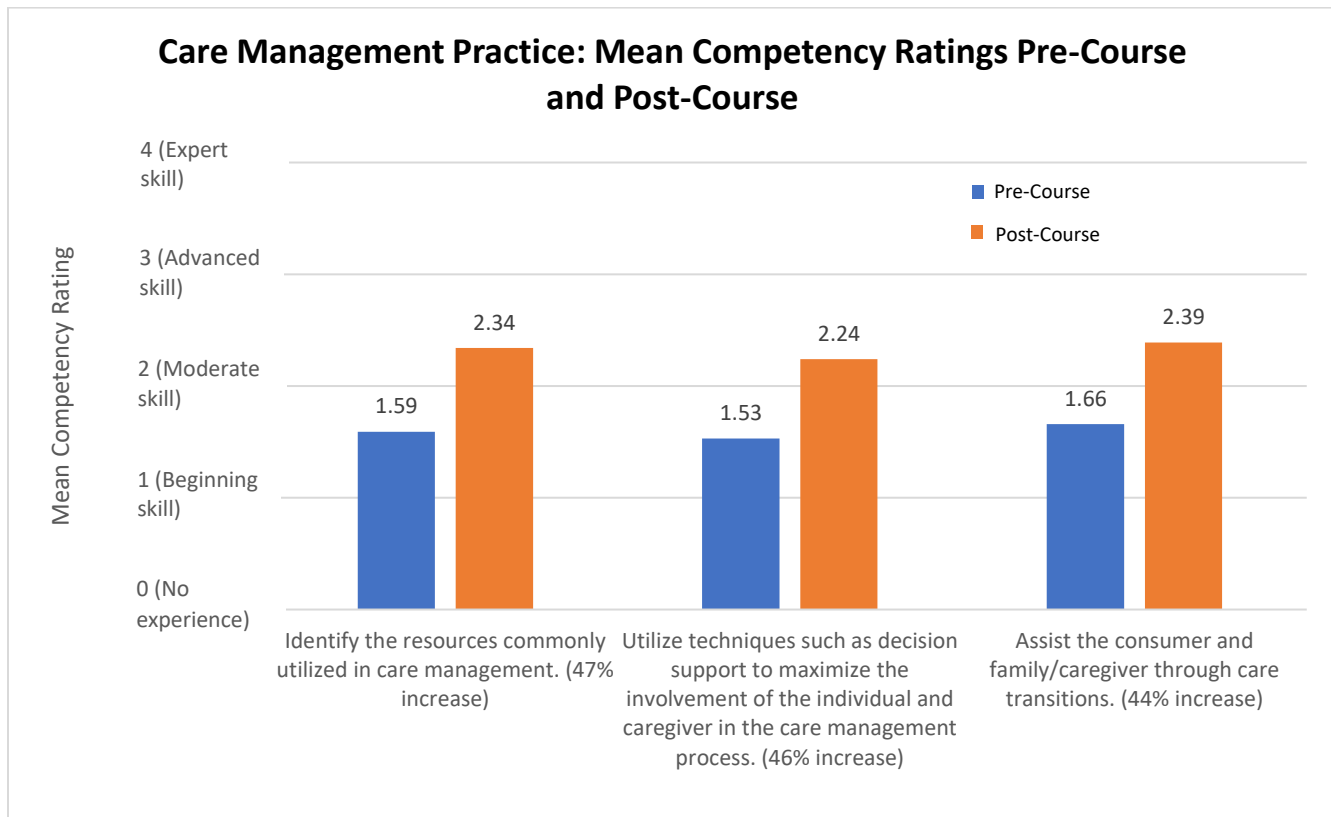
#### ***Course Four: Care Management Practice***

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

The combined mean competency rating across all ten competencies increased from 1.78 on the pre-course competency self-assessment to 2.37 on the post-course competency self-assessment, a 33% increase.

For each of the ten competencies, mean scores significantly increased ( $p < 0.05$ ) from the pre-course competency self-assessment to the post-course competency self-assessment. Percent increases ranged from 16% to 47%. *Figure 7* shows mean competency ratings for the three competencies with the greatest percent increases.

Figure 7



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

- Ninety-four percent (94.4%; n=67; missing n=4) 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=67; missing n=4) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**
- Ninety-seven percent (97.3%; n=73) 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-seven percent (97.3%; n=73) of learners agreed or strongly agreed that this course met the following learning objective: **discuss the legal and ethical dimensions of health care management.**

Ninety-four percent (94.2%; n=65; missing n=6) of learners agreed or strongly agreed that they would recommend this course to colleagues.

**Course content:** Learners indicated that the course was detailed and educational and that they now felt *“better informed on all aspects of case/care management.”* Learners enjoyed the course’s use of case examples to illustrate key points in care management, as they found it helpful to think through

various scenarios that might come up when caring for older adults and adults with disabilities. Many learners thought that course content on *“legal and ethical matters related to care management”* and end-of-life issues was critically important.

**Practice implications:** Learners indicated that this course felt *“immediately applicable to [their] work.”* Learners noted several ways in which they intended to refine their interactions with older adults and adults with disabilities. Learners described how they intended to be more empathic, open-minded, *“sensitive to the consumers’ needs and wants,”* and *“to always listen more.”* Learners felt more confident in their ability to understand and respond to challenging situations, such as *“approach[ing] a client having a hard time accepting care plan.”* Additionally, many learners described paying increased *“attention to cultural awareness and [the] effect it has on service delivery.”*

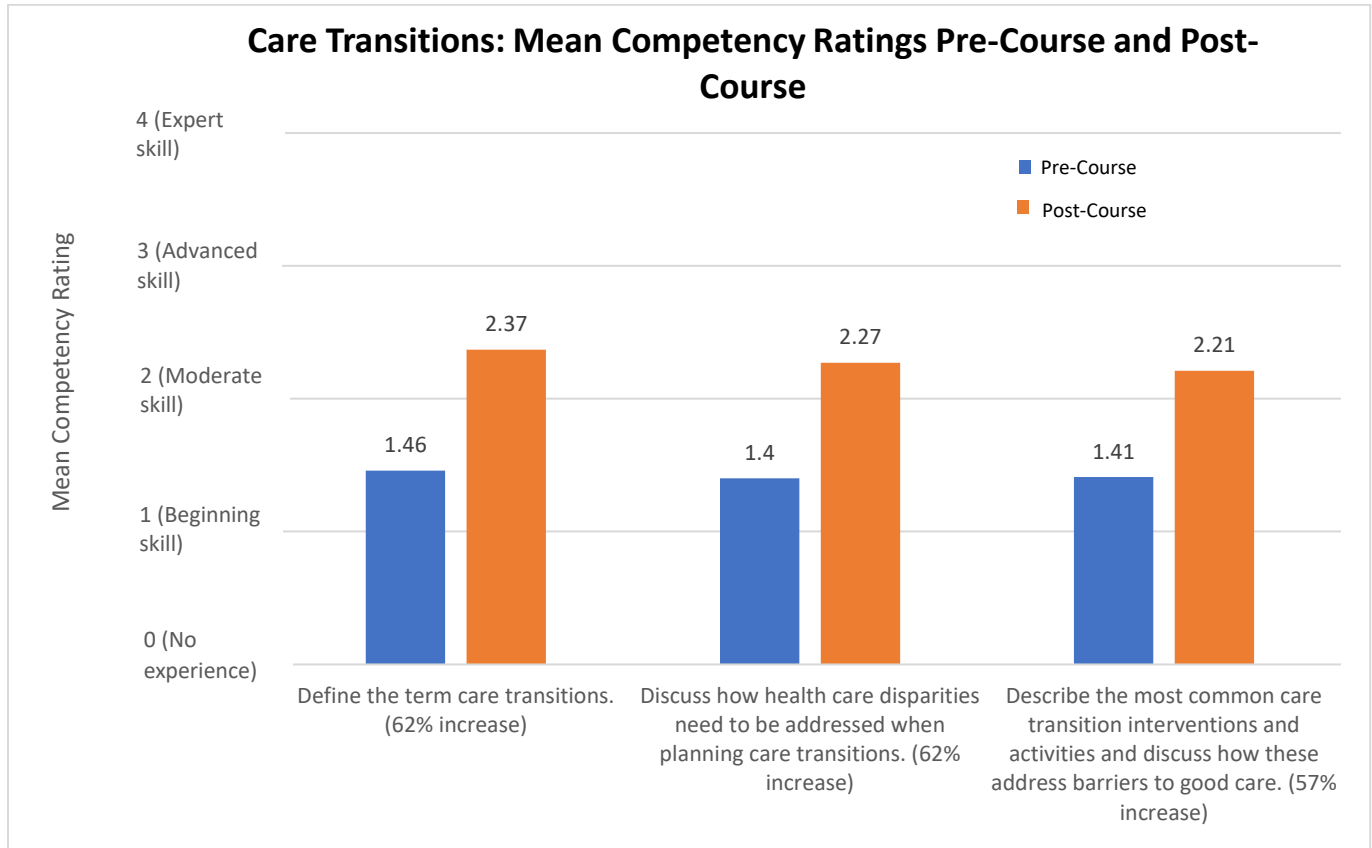
### ***Course Five: Care Transitions***

This course provided learners with the knowledge and skills to support clients and families during care transitions through team coordination, cultural humility, and knowledge of barriers to successful transitions of care.

The combined mean competency rating across all twelve competencies increased from 1.60 on the pre-course competency self-assessment to 2.31 on the post-course competency self-assessment, a 44% increase.

For each of the twelve competencies, mean scores significantly increased ( $p < 0.05$ ) from the pre-course competency self-assessment to the post-course competency self-assessment. Percent increases ranged from 21% to 62%. *Figure 8* shows mean competency ratings for the three competencies with the greatest percent increases.

Figure 8



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

- Ninety-four percent (94.6%; n=70, missing n=1) of learners agreed or strongly agreed that **this training will help them apply practice skills in the topic area.**
- Ninety-seven percent (97.3%; n=71, missing n=2) of learners agreed or strongly agreed that **this training expanded their knowledge and understanding of the topic area.**
- Almost ninety-nine percent (98.6%; n=74) of learners agreed or strongly agreed that this course met the following learning objective: **understand how health care policy and law affect older adults.**
- Ninety-seven percent (97.3%; n=73) of learners agreed or strongly agreed that this course met the following learning objective: **explain how culture, ethnicity, and health literacy impact care transitioning.**

Ninety-three percent (93.1%; n=67; missing n=3) of learners agreed or strongly agreed that they would recommend this course to colleagues.

**Course content:** Learners felt that the course was *“very helpful in describing the importance of facilitating care transitions”* and taught skills to ensure that care transitions are successful. Learners

found the breakdown of the various care transition models informative. Furthermore, through the course, learners were made ***“more conscious of health disparities.”*** Learners thought the course increased their *“awareness of different cultures”* and highlighted the *“importance of asking questions.”* Multiple learners also mentioned the course content on end-of-life care and advanced directives as being particularly informative and useful.

**Practice implications:** One learner stated that they plan *“to use the information I learned to help me better support my clients.”* Multiple learners discussed the importance of communication with the consumer and all others involved in the care transition process, particularly when making decisions about end-of-life care. A learner noted that after taking the course, they will push ***“for better communication with providers, particularly during and after nursing home discharges.”*** Another learner intends to *“spend more time championing advance directives.”* Learners felt more confident assisting with care transitions after receiving the resources and information in this course and will *“pay more attention to culture”* when providing care and support.

### III. SUMMARY

Overall, learners in the New York State Case Management Certificate Program reported that they gained key knowledge and skills applicable to their practice working with diverse aging and disability populations. Based on data analysis of self-reported competency scores, learners gained significant skills in all competency areas. Course feedback revealed that learners were inspired to be more mindful, understanding, and responsive to cultural needs. Learners appreciated the course content on federal, state, and local resources for the aging and disability populations and reported that they intended to use this information to better connect their clients to necessary resources. 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 New York.