Create Your Own Case Toolkit

Building Your Family Engagement Skills and Knowledge

Facilitators Guide

The Department of
Human Service Programs
Cambridge, Massachusetts

Harvard Family
Research Project

For more information please visit www.hfrp.org/COYCT

FACILITATORS GUIDE

People today are swamped with facts. They often find it difficult to bring order and perspective to the volume of information that they receive. That's where stories come in. Writer Annette Simons[1] says that stories help people interpret facts so that they become meaningful and enable people to make good decisions. Stories help people find their own wisdom.

A case is basically a type of story that invites critical thinking and problem solving. Unlike most stories, however, cases leave readers with lingering questions—questions about the motives and values of people, about different ways to address problematic situations, and about what actions people should take. People who work with families already have many stories and can use the Create Your Own Case Toolkit as a guide to help them recreate stories as cases.

Business, medicine and public health, and education have long used cases as teaching tools. In the case method, students and practitioners read, interpret, and analyze realistic scenarios and grapple with the dilemmas that each situation raises. For practitioners and educators who work with families, the case method challenges readers to consider multiple perspectives; think critically about real-world issues; communicate effectively; identify family strengths; and apply skills and knowledge about families in different situations. These are all abilities that educators need to effectively work with families.

The primary purpose of the *Create Your Own Case Toolkit* is to lead those who work with families through steps and exercises to enable them to write their own case. We approach the *Create Your Own Case Toolkit* with flexibility; we invite users to find inspiration in the examples that we provide and encourage them to design new techniques that promote better case discussion and case writing.

I. Activities in the Create Your Own Case Toolkit

Anyone who works with families including teachers, camp counselors, social workers, afterschool staff, home visitors, administrators, or community-based family service workers, can follow the steps in the Toolkit and complete the exercises to write their own case. The toolkit is divided into two main sections:

1

Activity 1: Steps to follow, with related exercises, to help those who work with families write their own case.

The toolkit provides six steps to help the user develop a case. Each step includes exercises to help the case writer think about how to write a case. Table 1 provides an overview of the steps in the case-writing process along with the specific exercises that relate to them.

2

Activity 2: A Collection of Family Engagement Cases.

The cases in this collection, or compendium, are used throughout the toolkit to provide case writers with examples that they can refer to when writing their own case. Table 2 lists all of the cases and the main issues that each case describes.

Access the resources that accompany the Create Your Own Case Toolkit by visiting:
http://www.hfrp.org/CYOCT

[1] Simmons, A. (2006*). The story factor: Inspiration, influence, and persuasion through the art of storytelling*. NY: Basic Books.

TABLE 1. ACTIVITY 1: STEPS IN THE CASE-WRITING PROCESS AND EXERCISES ASSOCIATED WITH THEM

Steps		Exercise
1 REFLECT	Reflect on your experience working with families	**Exercise 1.1: Reflecting on Families You Have Worked With** Think about your experiences with families. **Exercise 1.2: Using the Empathy Map** Develop a better understanding of how families think and feel.
2 IDENTIFY	Identify a mismatch	**Exercise 2: Identifying Mismatches** Consider mismatches in how different people think, feel, and act in a situation.
3 CHOOSE	Choose people and information to include in your case	**Exercise 3: Choosing People and Information for Your Case** Organize information about people and situations.
4 DEVELOP	Develop your case structure	**Exercise 4.1: Developing Your Case Structure** Tell the events of a story from beginning to end. **Exercise 4.2: Structuring Your Case Around the "Back Story" and the "Full Story"** Tell the events of a story in a case structure.
5 DRAFT and REVISE	Draft and revise	**Exercise 5: Reviewing Your Case** Revise and edit a case.
6 SHARE	Share your case with others	**Exercise 6: Creating Your Own Discussion Questions** Create discussion questions about a particular case.

TABLE 2. ACTIVITY 2: STEPS IN THE CASE-WRITING PROCESS AND EXERCISES ASSOCIATED WITH THEM

Case Name	Issues Presented
Case 1: When You Need to Change Your Strategy	Despite multiple invitations from an outreach worker, a mother chooses not to attend a series of community parenting workshops. The mother fears that the outreach worker is trying to break up her marriage. What can the outreach worker do?
Case 2: Reaching John: When Disengagement Is Not What It May Seem	A grandfather says he will attend community workshops about reading to children, but, at the last minute always cancels or does not show up. The grandfather very much wants to participate but is hampered by his own negative experiences learning to read. What can a community worker do?
Case 3: The Importance of Not Judging	Linda's son has been acting out at summer camp. After many failed attempts to reach Linda on the phone to talk about her son's difficult behavior, the camp director leaves a final message telling Linda that if she does not come in to talk, her son cannot continue to be in the program. Was the director's action appropriate?
Case 4: Making Your Intent Clear	An outreach worker has left multiple messages with a family about attending English classes, but the family never returns the calls. One day the mother reveals that she is fearful that the purpose of the program is to change her religion. How should the outreach worker respond?
Case 5: Understanding the American School System	An outreach worker is thrown off guard when she learns that a father has not been sending his 7-year-old son to school. What should she say to the father?
Case 6: The Real Meaning of Back to School Night	A mother of an elementary school student who recently immigrated to the United States chooses not to attend her daughter's back to school night event. How can the outreach worker encourage the mother to attend?
Case 7: Engaging the Whole Family to Find a Solution	A mother and father who have immigrated to the United States refuse to apply for the supplemental nutrition assistance program for themselves and their children because they believe it is shameful. How can an outreach worker build trust with the family to convince them to apply?
Case 8: When Translation is Not Enough	A preschool director is frustrated when a mother who recently immigrated to the United States from Haiti does not respond to letters she has been sent regarding tuition payments for the school year. What actions should the director take?

II. Different Approaches to Using the Toolkit

Cases are powerful learning tools. Through the questions they raise and the emotions they call into play, they can change viewpoints and even ways of acting. For this reason, faculty in higher education, professional development specialists, supervisors, and coaches can use cases to encourage learning. Below are ways in which these groups of people might effectively use cases. We recommend that you read all of the activities to discover ideas that you use in your own work or to help find inspiration to create your own activities. For example, the toolkit can be used not only with practitioners, but also with families. As one example, the cases in the toolkit can be used as the basis for conversations among a small group of parents and practitioners to promote deep reflection, learning and the sharing of perspectives. The ideas presented are based on the exercises (see Table 1) and cases (see Table 2) provided in the toolkit.

1 Faculty who are Teaching Courses on Family, School, and Community Topics

Have students write their own case as a course project.
As a mid-year or final project, have students write their own case about one of their experiences working with a family. The *Create Your Own Case Toolkit* will give students the inspiration and structure to write an effective case. Schedule "check-in" points with students throughout the semester to review the exercises and drafts that they have completed. In your last class, have students share their final case.

Have students develop their own case as a series of assignments over the course of the semester.
For seminar classes in which small groups of students meet regularly over a period of 6 or more weeks, have students complete a step each week (e.g., Step 1 in week 1, Step 2 in week 2) and bring completed exercises to class. One seminar class can be dedicated to sharing and discussing final cases.

Facilitate a class discussion on the cases provided.
Use the cases in the compendium (see Table 2) as a basis for class discussions. Review a different case each week, or break the class into small groups and discuss each of the cases in one class period (See Appendix I for an example of a case facilitation format).

Analyze the cases provided using the exercises in the toolkit.
Use individual exercises and cases for problem solving and reflection. For example, Exercise 2: Identifying Mismatches can be used to help students identify mismatches in the collection of cases included in the toolkit. As a different example, Exercise 6: Creating Your Own Discussion Questions can be used to help students develop discussion questions for one of the cases in the case collection.

2 Professional Development Specialists

Have practitioners write cases as part of their individual professional development hours.
Increasingly, practitioners are given opportunities to complete professional development hours individually, during times that work for them. By using this toolkit, practitioners can complete exercises at their own pace and have a final product that they can share with others.

Use materials from the toolkit in face-to-face meetings, seminars, and workshops.
Select different cases and exercises that meet the timeframe, goals and audiences of your session. Review Appendices I and II for sample training sessions and be inspired to mix and match components of the toolkit to create your own session structure.

Organize a study group that centers on participants writing a case.
Bring together a group of 6-8 practitioners or practitioners and families on a regular basis and use this toolkit as the focus of your work. For example, each meeting might focus on one of the steps in the toolkit (e.g., week 1 focuses on reflection, week 2 on identifying mismatches, etc.). Print out the materials for everyone in your group to use as a workbook. Participants might complete the exercises in a group setting or at home for the upcoming session. As you progress through the steps, the group can draft, revise, and share cases with one another. The cases provided can be woven throughout each meeting as a basis of discussion until new cases are developed.

3

Supervisors and Coaches of Individuals who Work with Families

Invite a practitioner to write a case as part of the supervision process.
In reflective supervision, a practitioner who works with a family meets regularly with a supervisor to discuss, think about, and reflect on different families the practitioner works with. As part of the supervision process, the supervisor might ask the supervisee to write about an experience that he or she has had with a family. This activity can be used as a method to encourage reflection, celebrate success, and elicit important lessons learned.

Ask practitioners to complete different exercises as a toolkit to analyze and reflect on families they currently work with.
Use the exercises in this toolkit to help practitioners think about their experiences working with families. For example, by completing Exercise 1.2: Using an Empathy Map, a practitioner can develop a better understanding of how a family member thinks and feels. Using Exercise 2: Identifying Mismatches, a practitioner can begin to more clearly see differences in perspectives among people in a situation.

How Can We Help You?

The *Create Your Own Case Toolkit* is based on the work of the Community Engagement Team (CET), in the Department of Human Service Programs, in Cambridge, Massachusetts. The CET is a multi-agency collaborative that reaches out to underserved Cambridge families and connects them to community events and resources, develops community leaders, and supports agencies in working with a diverse community. The cases described in this tool were written by the CET outreach workers in the spring of 2013 for a one-day networking event for multiple agencies throughout Cambridge. CET outreach workers are responsible for supporting families in the community, leading parenting workshops, helping schools connect with immigrant families, and a host of other special projects. The cases were designed by the outreach workers to bring authentic parent stories into a larger discussion among community providers about family outreach. To learn more about the CET or ask questions about the cases, please contact Carole Sousa at: csousa@cambridgema.gov.

Did you find this toolkit interesting or helpful? E-mail Margaret Caspe at margaret_klein@gse.harvard.edu with your cases, ideas, or any other feedback you might have about this toolkit. You can also join the conversation about using cases to prepare practitioners for family engagement by sending an e-mail to hfrp_case_users@googlegroups.com. Last, learn more about using the case method to prepare educators for family engagement by visiting the HFRP website.

Appendix I - Sample Session 1: Facilitating a Case Discussion[1]

Time	1 hour
Audience	Any group interested in learning ways to communicate and build relationships with families more effectively.
Goals	I. Build better relationships with families and communicate in clear ways. II. Understand the importance of uncovering family strengths. III. Challenge assumptions about families and take different perspectives in a complex situation.

Agenda

Establish General Guidelines (5 minutes)
At the outset of the workshop, set ground rules for the discussion. These might include the following:

- Make sure that everyone in the group is participating and has a chance to introduce him/herself.
- Give equal value to all ideas, solutions, and questions presented. There is no "one right" answer.
- Invite participants to set guidelines for the discussion. For example, all ideas and suggestions are welcome, and responses to each other's comments should be respectful and non-judgmental.
- Explain that the cases (1) are a snapshot about one family and (2) are not necessarily a representation of a whole group or community. Also explain that the names and ages of the children have been changed to protect confidentiality.

Read the "Back Story" (5 minutes)
Assign groups of 5-7 people to read one case from Activity 2 (Table 2). Give participants 5 minutes to read the back story you provide them.

Discuss the Back Story (10 minutes)
Ask each group to discuss among themselves the following questions:

- What does the outreach worker want?
- What does the family member want?
- What assumptions might you make about a family member's reasons for not being engaged?
- What do you think the barrier to engagement might be?
- What strategies for engagement might you employ?

These questions might be printed on index cards or written on a white board or on PowerPoint slides in the front of the room. As you circulate around the room, ask questions of the group, using the prompts, "I wonder…," "I'm curious about," "Say more about…." If possible, you might also have a trained facilitator sit at each table to help guide the conversation.

Read the "Full Story" (5 minutes)
Ask participants to return to their case and read the full story.

[1] This facilitation exercise was developed by Carole Sousa, CET Coordinator of the Community Engagement Team. This facilitation format was used in the spring of 2013 as part of a 1-day networking event for professional in multiple agencies throughout Cambridge, Massachusetts, such as school program staff, police, and librarians. The purpose of the case facilitation exercise was to help providers within different agencies challenge assumptions about families in the community and find ways to better engage them.

Discuss the Full Story (15 minutes)

Ask each table to discuss among themselves the following questions and capture responses on chart paper:

- What were the differences and similarities between the way you thought about the case before and after you read the full story?
- What might you have done in this situation had you been the outreach worker?
- What lessons about working with families do you take away from this story?

Report Back and Conclusions (20 minutes)
Bring the groups back together and have each table share out what they learned from reading their case (depending on how many tables you have and how much time, you might not be able to have each table share back). For the report back, ask participants to stand and read the summary of the cases each group worked on. Then review and discuss as a group the points that each group wrote out on the chart paper.

At the conclusion of the workshop, summarize the main points you have heard, and let participants know that, if they are interested in writing their own case, they can visit the full Create Your Own Case Toolkit.

Appendix II - Sample Session 2: Introducing the Case Writing Process

Time	Half-day session (approximately 3 hours)
Audience	Anyone who works with families, including, but not limited to, family service workers, teachers, etc.
Goals	I. Build better relationships with families and communicate in clear ways. II. Understand the importance of uncovering family strengths. III. Challenge assumptions about families and take different perspectives in a complex situation. IV. Get an introduction to the idea of writing a case and generate ideas for cases.

Agenda

Introduction (20 minutes)

- Have participants introduce themselves and engage in a short icebreaker activity.
- Talk about the goals of the session.

Facilitating a Case Discussion (60 minutes)
See Sample Session I (Appendix I).

Making the Link Between Reading Cases and Writing Cases (15 minutes)

- Explain to participants that the cases that they had just read were written by outreach workers—people just like them who work with families.
- Pass out the testimonials (see Create Your Own Case Toolkit) so that the participants can read about four of the authors.
- Explain that, for the remainder of the workshop, each participant will work on exercises to help him or her think about creating a case

Break

Exercises (50 minutes)

- Divide participants into groups when they return from their break.
- Distribute Exercise 1.1: Reflecting on Families You Have Worked With to each group and ask them to complete it. The exercise is designed to get participants thinking about their own experiences with families.
- Have participants at the table talk about what they wrote and choose one family that they would like to focus on for a case.
- Distribute to each table one of the following 4 exercises: Exercise 1.2: Using the Empathy Map, Exercise 2: Identifying Mismatches, Exercise 3: Choosing People and Information for Your Case, or Exercise 4.1: Developing Your Case Structure.
- Ask each person at the table to think about the experience that they would like to capture and complete the exercise with that family in mind.
- After each participant completes the exercise individually, ask participants to talk with others at their table about the case they are interested in writing and their reasons for wanting to do so.
- Bring the participants from all of the tables together as a group, and have each table share out the activity they worked on and discuss how it helped them focus on their individual cases.

Conclusions (20 minutes)

- Draw out the main lessons learned from the workshop—both from reading and writing cases.
- Introduce the online toolkit and encourage participants to engage with all of the exercises and write their own case.
- Create a group discussion online or offline about the cases that people write.

Appendix III - Sample Session II: Writing Your Own Case

Time	Full-day training
Audience	Anyone with experience working with families
Goals	I. Build better relationships with families and communicate in clear ways. II. Understand the importance of uncovering family strengths. III. Challenge assumptions about families and take different perspectives in a complex situation. IV. Write a case about an experience working with families.

Agenda

Reflection Icebreaker and Introductions (25 minutes)

- Cut out the different question prompts from Exercise 1.1: Reflecting on Families You Have Worked With and place them in a bag.
- Pair participants and have each dyad pick 2 question prompts.
- Ask the participants to take 5-10 minutes to reflect on and discuss the prompts from the bag.
- Ask those who are willing, to share what they discussed in their dyad.
- Introduce yourself and the goals of the session and explain that, as a group, you will be developing cases based on some of the reflection they've just done.

What's a Case? (45 minutes)

Together, as a group, read from Table 2 the back story to a case that you think is applicable to your group. After reading the back story, ask questions such as:

- What does the outreach worker want?
- What does the family member want?
- What assumptions might you make about the family member's reasons for not being engaged?
- What do you think the barrier to engagement might be?
- What strategies for engagement might you employ?

Have the group read the full story. Afterwards, engage in a conversation around the questions:

- What were the differences and similarities between the way you thought about the case before and after you read the full story?
- What might you have done in this situation had you been the outreach worker?
- What lessons about working with families do you take away from this story?
- How did knowing the full story change their perceptions of the case?
- What a case is and how a case can be an important learning opportunity?

Making the Link Between Reading Cases and Writing Cases (15 minutes)

- Explain to participants that the cases they had just read were written by outreach workers—people just like them who work with families.
- Pass out the testimonials (see the Create Your Own Case Toolkit) so that the participants can read about four of the authors.
- Explain that, for the remainder of the workshop, participants will engage in a process to create help them create their own cases.

Break

Step 1: Reflect on Your Experiences Working With Families (30 minutes)

- Ask each participant to reflect on a family that he or she has worked with in the past or is currently working with and would like to focus their case on. Participants can also consider a family that they discussed during the icebreaker activity.
- Have each participant complete Exercise 1.2: Using an Empathy Map, based on information about the family they have in mind.

Step 2: Identify a Mismatch (30 minutes)

- Begin this portion of the process with a brief mini-discussion about the importance of a mismatch and the reasons why a mismatch is the cornerstone of a case.
- Identify the mismatch in the case you discussed at the start of the session.
- Create a large grid on chart paper at each table, which will be a "life-size" version of Exercise 1.2: Using the Empathy Map (see below).

What are the family member's needs and wants?	What do you—or the other person in the situation—need and want?	What steps would you take (or, were taken) to fulfill the needs and wants of the family member and those of the other person in the situation?	What steps would you recommend (or, were taken) to build a stronger relationship and better communication with the family member?

- Ask participants to fill out the table with their case family in mind, using post-it notes that you provide.
- Discuss participants' responses as they write, and help them choose cases that have a clear mismatch.

Step 3: Choose People And Information to Include in Your Case (30 minutes)

Explain to participants that they will now choose people and information to include in the case utilizing Exercise 3: Choosing People and Information for Your Case.

Break for Lunch

Step 4: Develop Your Case Structure (30 minutes)

- Explain to participants that this is the part of the process where the case comes together.
- Ask participants to take what they've worked on so far and complete either Exercise 4.1: Developing Your Case Structure or Exercise 4.2: Structuring Your Case Around the "Back Story" and the "Full Story".
- Invite participants to write drafts using computers or electronic tablets or on paper.

Steps 5 & 6: Draft, Revise, and Share (60 minutes)

- Break participants into small groups to talk with one another about their cases.
- Invite participants to read portions of what they have written or simply present a brief summary of the case they are working on.
- Review each of the steps in Exercise 5: Reviewing Your Case, so that those in the group can provide feedback about the case.

Conclusions (20 minutes)

- Close the session, talk about potential next steps for the cases, and get feedback about what the experience was like.
- Find ways for the group to continue to work on their cases via a listserv, online portal, or discussion board.
- Let participants know that, if they are interested in working through these steps in more in-depth ways, the materials are available online.

Access the resources that accompany the Create Your Own Case Toolkit by visiting:

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Harvard Family Research Project
50 Church Street, 4th Floor
Cambridge, MA 02138
(617) 495-9108

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