Training the Next Generation of Case Management

NACM Core Competency: Educational Development

NACM Annual Conference 2020
About Us

Kenneth Sheain
Operations Manager

Jarrett Perlow
Chief Deputy Clerk
Education, training, and development should be . . .

Continuous and creative

Inclusive

Accessible and tailored

Well-managed

Delivered using multiple mechanisms

Evaluated

NACM Core Competency
Educational Development
1. Identify challenges with traditional training approaches

2. Learn the benefits of cumulative and modular-style training programs

3. Understand how to apply these training model concepts to develop custom training programs for any court type

4. Learn about fundamental resources needed to support and train new employees

5. Identify data collection and quality assurance techniques to develop and refine training programs
Workforce Challenges

Changing Demographics
By 2024, 45% of the workforce will be born after 1980.

Attrition
66% of entry level employees are predicted to leave within three years.

Knowledge Transfer
Over 29% of the federal workforce is retirement eligible.

Planning a New Way

Our Challenges
- Lengthy or endless training cycle
- Lack of standardization
- Dependency on external factors
- Lack of flexibility
- Lack of support and resources

Program Objectives
- Reduce training time by 50%
- Validated minimum accuracy of 85%
- Allow for varying learning types and speeds
- Account for changing operational needs
- Dedicate necessary staff and resource supports for trainees
Program Results
Case Manager Training Timeline

Training Months to Full Caseload

Number of Months

Prior Program

Case Manager A
Case Manager B
Case Manager C
Average

New Program

Average 13.67

Average 4

~75% Training Time Reduction
Three-Year Case Manager Team Accuracy Results

~14% Increased Accuracy from Baseline
## Court Employee Satisfaction Survey Questions

<table>
<thead>
<tr>
<th>Court Employee Satisfaction Survey Questions</th>
<th>August 2018 Average</th>
<th>April 2019 Average</th>
<th>Percent Change</th>
</tr>
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<tbody>
<tr>
<td>I get the training I need to do my job well.</td>
<td>3.88</td>
<td>4.38</td>
<td>+12.8%</td>
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National Recognition

- W. Edwards Deming Outstanding Training Award in Human Capital Development (2019)

- Director’s Award for Excellence in Court Operations: Mission Requirements (2018)
Training Program
Foundational Knowledge

✓ Steep learning curve
✓ Orientation ≠ Training
✓ Teach “why” before “how”
✓ Provide resources
Cumulative Training Model

Theory, Concepts & Terminology (Classroom)

Practice (Simulated Environment)

Performance (Live Application)

Evaluation (Quality Assurance)
Modular Approach

Case Manager Training
Workflow & Responsibility

Unit 1
- Prepare
- Train
- Practice
- Review
- Evaluate

Unit 2
- Prepare
- Train
- Practice
- Review
- Evaluate

Unit 3
- Prepare
- Train
- Practice
- Review
- Evaluate

85% minimum score to advance stages and units

Trainer with Trainee
Trainee on own
Mentor with Trainee
Trainer on own
Trainee Support

✓ Dedicated trainer
✓ Accessible documentation
✓ Focused attention
✓ Regular trainer feedback
✓ Regular manager check-ins
Metrics and Evaluation

Is It Working?

✓ Collect data
✓ Analyze results
✓ Compare progress over time
✓ Pivot if necessary
## Designing Your Program

<table>
<thead>
<tr>
<th>Task</th>
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<tbody>
<tr>
<td>Analyze case-type volume and staff work measurement</td>
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<tr>
<td>Identify and adjust available resources and staffing</td>
</tr>
<tr>
<td>Identify module and unit topics</td>
</tr>
<tr>
<td>Identify and create training samples/test database</td>
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<tr>
<td>Document processes and procedures</td>
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<tr>
<td>Create evaluation criteria</td>
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Contact Us

Jarrett Perlow, Chief Deputy Clerk
202-275-8021
perlowj@cafc.uscourts.gov

Kenneth Sheain, Operations Manager
202-275-8024
sheaink@cafc.uscourts.gov