# Case Management: An Emerging Area of Specialization



**Presented by:** 

Roberta Neault, PhD.. CCC, CCDP, GCDFi, & Cassie Taylor, BAA Life Strategies Ltd. www.lifestrategies.ca / info@lifestrategies.ca / 604-856-2386



Pilot, Feedback, and Revision

Toolkit Showcase

**Next Steps** 

## Agenda



## What is Case Management?

"a collaborative process of assessment, planning, facilitation, care coordination, evaluation, and advocacy for options and services to meet an individual's and family's comprehensive . . . needs through communication and available resources to promote quality, cost-effective outcomes"

### The Career Development Landscape

CDPs identified "case management" as
a Top 10 work task and the most time-consuming
Increased need for intensive case management /
counselling to support clients

Skill gaps / growth opportunities evident

Limited funds for specialized training

No targeted case management resources for CDPs



### Objectives

Provide a topical backgrounder setting the scene for case management within the career development sector

Explore case management best practices to support the development of efficient/effective client services

Better equip CDPs to practice as case managers

Fill identified training gaps through freely available self-study materials and job aids



## **Project Phases**

### **Environmental Scan**

Development

Pilot / Revision

Dissemination





### 2 Groups

LearnOnline
Case Manager
Students

Key Informants



### Mapped Book to Course

- 1. Overview of Case Management History
- 2. Case Management Roles
- 3. Introduction to Assessment Framework
- 4. Case Conceptualization
- 5. Case Documentation and Logistics
- 6. Action Planning and Selecting Interventions
- 7. Coordinate Your Interventions
- 8. Post-Intervention Debrief and Closing the Case



## Stakeholder Feedback Survey

What do like about this resource?

What would you want us to ensure is kept?

What would you like to see added?

What would you want removed?

How do you find the readability, flow, and structure of the book?

Do you think this resource will help Case Managers in their work? Why or why not?

If you noticed any errors during your review, please specify what and where.

If you have any other comments, please let us know.



## Key Informant Feedback

A great guide for individuals just starting to dip their toe into career focused case management.

This resource is comprehent to be a case manager in each and also provided p

I particularly liked the 'Today's Realities' section and feel this could be a substitution where industry leaders con and discuss further for career decreases.

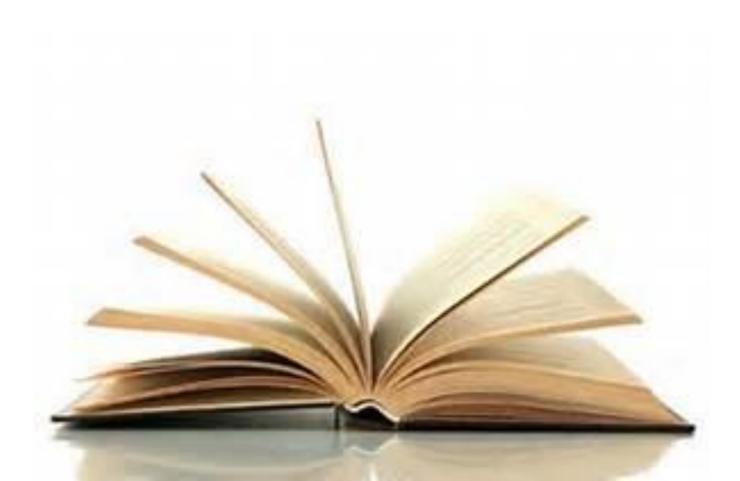
e of case management

the role of case management
in career development
and addresses the challenges
that are faced by those
providing case management services

I can see how this would be a practical and well informed toolkit for career development practitioners as well as employment service leaders to provide high quality professional case management.



### **TOOLKIT SHOWCASE**



# Part 1: The Profession of Case Management

Historical Context

Standards of Practice

Models

Scope of the Role



# Part 2: Case Management Competencies

Understanding Mandates

Building a Working Alliance

Advocacy

Cultural/Diversity
Competency

**Case Notes** 

**Community Connections** 

**Coordinating Interventions** 

Managing Time and Prioritizing Needs



# Part 3: The Process of Case Management

Needs Assessment Case Conceptualization

**Making Decisions** 

Collaborative Action Planning

**Making Referrals** 

Exploring Opportunities

Measuring and
Evaluating
Progress / Making
Adjustments

Transition and Closing the Case



#### Part 4:

### Today's Realities: Concerns from the Field

Critical Thinking and Reflective Practice

Clinical /
Practice
Supervision

Leadership Development

Collaboration and Community Capacity Building

Career Engagement





### Case Management: An Area of Specialization?

#### Core

- Professional Behaviour
- Interpersonal Competence
- Career Development Knowledge
- Needs Assessment and Referral

#### **Specializations**

- Assessment
- Facilitated and Individual Group Learning
- Career Counselling
- Information and Resource Management
- Work Development
- Community Capacity Building



## Skill Development

Connect with other professionals

Arrange for supervision, coaching, or mentorship at work

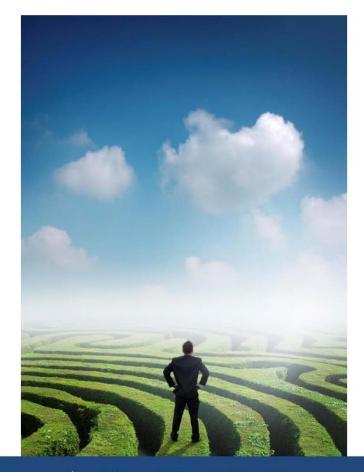
Develop workplace-based, on-the-job training

Access training independently

Attend workshops/webinars

Read articles, books, reports, etc.





# So You Want To Be A Case Manager? A Career Practitioner's Toolkit

Dr. Deirdre A. Pickerell Dr. Roberta A. Neault

#### View Online

 http://www.ccdf.ca/ccdf/wpcontent/uploads/2016/06/Case-Manager-Toolkit\_6x9\_Main-Text\_2016-06-07-FINAL.pdf

#### **Purchase Print**

https://www.lifestrategies.ca/store/

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