

Case Management: An Emerging Area of Specialization



Presented by:

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Agenda

Project
Overview

Pilot,
Feedback,
and
Revision

Toolkit
Showcase

Next Steps



PROJECT OVERVIEW

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



(Bezanson, O'Reilly, & Magnusson, 2009; CERIC, 2011; Life Strategies, 2013; Myers, Smith Fowler, Leonard, Conte, & Gyarmati, 2011)

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

A red pen lies horizontally across the middle of the frame, pointing towards the right. The background is a document with handwritten text in black ink and several red markings, including circles and lines. The text is partially obscured by the pen and the central text overlay. The overall scene suggests a process of review or editing.

PILOT, FEEDBACK, AND REVISION

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 you 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 comprehensive. It provided an excellent overview of what it is like to be a case manager in employment services and also provided practical advice. I particularly liked the 'Today's Realities' section and feel this could be a valuable resource where industry leaders come together to share their experiences and discuss further.

Helpful context regarding 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



NEXT STEPS



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/wp-content/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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