# 10.
# Other Useful Information

Overview of Case Management in Overhead Format…… 10.1

# Purpose of the SAAP Case Management Resource Kit

The SAAP Case Management Resource Kit provides SAAP services with basic information on the case management process.

This information is to assist services to develop their own case management approach.

# What is in the Resource Kit

The Case Management Kit contains ten sections:

1. SAAP Case Management
2. Practising Case Management
3. An Example of Case Management in an Outreach Service
4. An Example of Case Management in a Women's Refuge
5. An Example of Case Management in a Youth Refuge
6. An example of Case Management in a Transitional Accommodation Service for Families
7. An Example of Case Management in a Day Centre for Single Adults
8. Example Policy and Procedures File
9. References, Resources, Acknowledgements and Glossary
10. Other Useful Information

# Using the Resource Kit

To get the most value out of this Resource Kit it is suggested that you first read Sections 1 and 2 and then one or more of the example Sections as relevant to your service.

Section 8. Example Policy and Procedures File, is also of value to all services.

# The Floppy Disk

A floppy disk containing copies of the example processes and policies used in the Resource Kit is included with the Resource Kit. Services are free to use the material included on the disk as they wish.

Information on the disk is in Microsoft Word 6.0 format.

# Examples Only

The material included in the Resource Kit and on the Floppy disk are examples only. Services are not required to use them.

If you do use the examples change them to meet the needs of your service.

# What Is Case Management?

Case Management is an approach to service delivery.

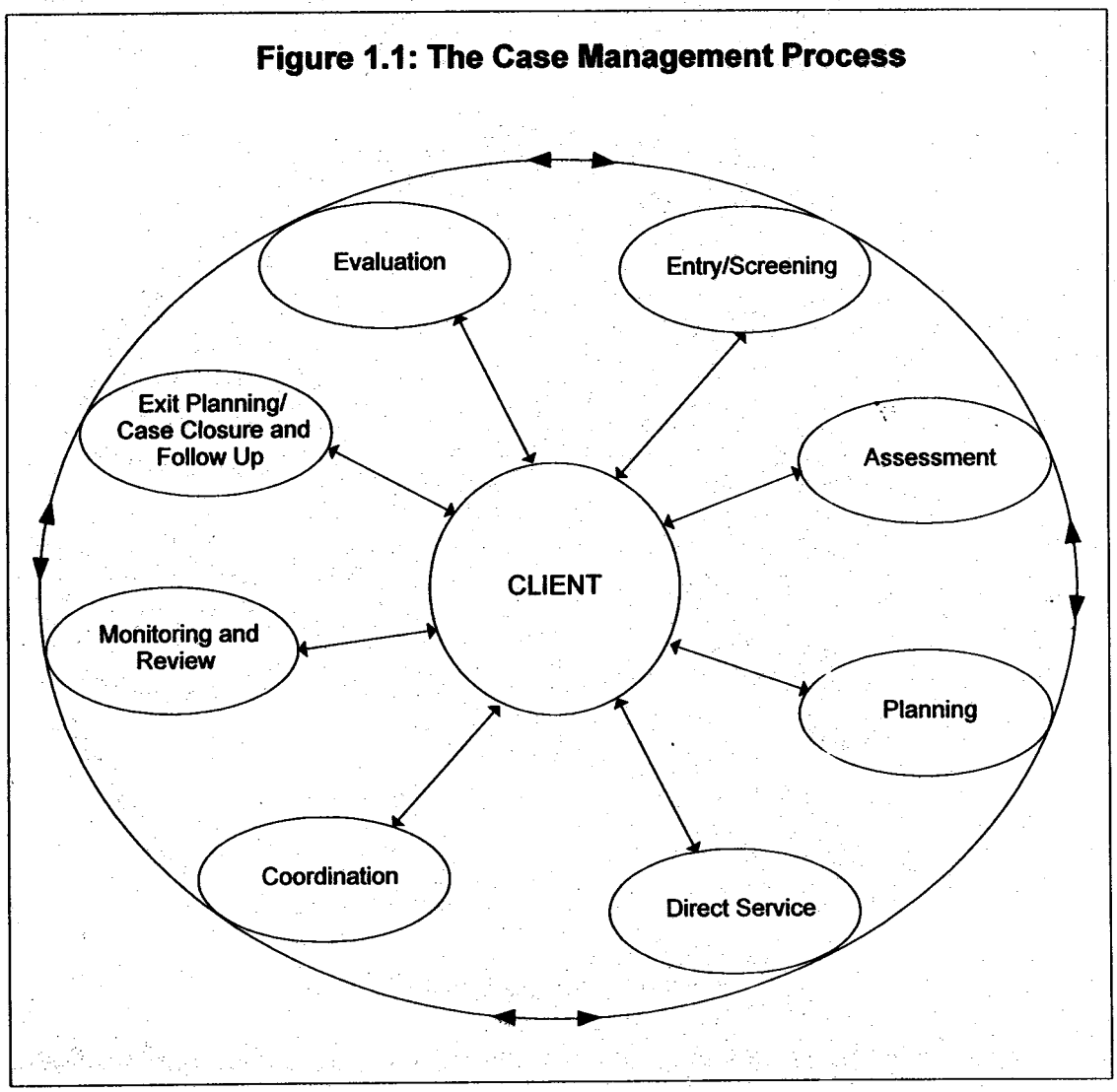
It is a process of working with clients which focuses on their needs and goals, and on developing flexible strategies to assist them to achieve their goals.

# Why do Case Management

Case management is a requirement of SAAP Funding. Implementing a case management approach leads to:

- Improved outcomes for clients;
- Increased client control;
- Consistent service quality across SAAP;
- A practice framework for staff;
- More effective use of staff.

# The Elements of Case Management



# The Case Management Process

The previous diagram shows the elements of case management.

These elements **ARE NOT** carried out as steps 1 to 8. One or more tasks may occur at the same time and, in practise, some elements such as Entry/Screening and Assessment may be combined.

# Practice Principles

There are a set of standards or practice principles for each of the elements of case management. These:

- Provide clear guidelines for the practice of case management;
- Promote a consistent quality of service;
- Provide a tool for evaluation and review.

# Different Approaches to Case Management

SAAP services are asked to adopt the key elements of case management, however, each service will implement their own unique approach which will depend on:

- the service type;
- the target group;
- the service philosophy.

# Bare Essentials of a Case Management Approach

- involve the client in identifying their needs;
- look at the client's whole situation;
- use support plans to address client's needs;
- review client's progress;
- keep written records on work with clients;
- close the client file when contact is finished;
- network with other services.

# Tools For Case Management

The tools used in case management may include:

- forms for noting client information;
- checklists on possible client issues;
- support plans and action plans;
- client files;
- information brochures and handbooks;
- a resource file on other services.

# Client Goals

- goals should be achievable;
- long term goals can be broken up into smaller steps.

The long term goal: "*To obtain independent housing*", can be broken up into:

- pay off rent arrears;
- develop budgeting skills;
- obtain appropriate housing.

# Coordination

Coordination includes:

- networking with other service providers;
- having a resource index of other services;
- developing referral protocols for clients;
- including services from other agencies in client's support plans where appropriate.

# Referral Protocols

Referral protocols specify:

- how referrals should be made;
- eligibility criteria;
- the kinds of information that can be shared;
- the services that can be provided;
- arrangements for case management responsibility.

# Case Management with Children

The key points in case management with children are:

- families should be supported to effectively care for their children;
- children remain the responsibility of their parent/s whilst in a SAAP service;
- each child has their needs assessed and responded to.

# Implementing Case Management

To implement case management effectively develop an implementation plan:

- identify who will work on it;
- identify the tasks to do;
- set priorities and timelines;
- implement the plan.

IMPORTANT: Involve the Management Committee and keep staff fully informed.

# The Importance of Policy

Most services already practise a case management approach to service delivery.

Implementing case management is formalising what you already do. It is writing down your processes, developing tools and providing formal training to staff.

Written policy and procedures are the key to effective case management.

# Staff Training

Workers doing case management need skills or competencies in:

- communication/interpersonal skills;
- knowledge of issues for the client group;
- knowledge of service policy and procedures;
- knowledge of community resources.

Consider developing a staff training plan

# Overheads for Staff Training

These slides are included in Section 10 of the Resource Kit in a format suitable for overheads.

You may find them useful in staff training.

# More Information

For more information on case management, including a bibliography of available literature, see Section 9 of the Resource Kit: References, Resources, Acknowledgements and Glossary.