Handout 4: Case Management and the Needs of Clients

Planning is a process focused on identifying client needs, clarifying goals and hopes, setting priorities, and identifying steps/actions necessary to achieve the needs of clients. The goal of the Case Management plan is to help the client develop self-sufficiency so that they can manage their own lives without dependence on the human service delivery system. The principles of good practice in planning are:

- Clients are actively involved and drive the process
- The support plan addresses the needs of clients as perceived by them
- Clients are assisted to identify immediate short-term and long-term goals, and action plans
- Each accompanying child is included in a support plan.

Developing a Planning Process

The key tasks in a planning process could include developing:

1. Appropriate community resources. Services need to be aware of the other services and resources available in the community which may assist clients.

2. A tool to assist the services e.g. a support plan. It provides a written record which the service and client have developed together to meet the client's needs. The support plan is developed from the assessment information and lists the goals which the client wishes to work on. Each goal is broken down into actions or tasks, which are allocated to the worker or client to do within a time frame.

3. A tool to assist clients e.g. a support plan summary. Clients should be given a copy of the support plan.

4. Written policy and procedures. These should include an outline of who does the planning, when and how planning is done and the use of tools including written support plans.

Contributing to the Case Management Plan

It is important that professionals work together with other professionals to make Case Management work. Assessing information requires discussions with other workers. Then there is the finding and organising of resources and monitoring of client progress. All of this requires a number of professional workers constantly communicating with each other.

There are several ways in which professionals can support case managers with whom they work. Such support helps establish and maintain a professional
network. There are many characteristics that contribute to a person's ability to contribute in a meaningful way. A few examples include:

- Enthusiasm
- Creativity
- Flexibility
- Willingness to act

It is important to believe in yourself and in the client's ability to learn and change. An enthusiastic person takes everyone along with them. They are willing to take positive action and focus on solutions. Of course enthusiasm alone is not enough.

You also need people who are creative. With diminishing resources and an increasing number of clients with multiple problems, new ideas and alternate ways of viewing situations are imperative.

Establishing goals requires flexibility and patience. Professionals, especially Case Managers need to be flexible. The Case Management process must deal with constant change especially during the implementation phase. Flexibility is necessary to deal with the change in client needs, the service environment, available resources, personnel, policies and regulations.

Another characteristic that motivates the work of other professionals is a willingness to act. Often the assessment and planning stages are the easy periods in the Case Management relationship. Then comes implementation of the plans and workers think "Is the client ready?", "Will other agencies complete their part of the Case Management plan?", "Will the client fall flat on their face?", "Do I have the confidence to go any further with this client?".