Handout 1: The Case Management Process

Case Management is an approach to service delivery. It is one way of delivering services. Many community agencies are required to implement a case management approach to working with clients.

In addition Case Management is particularly relevant in providing assistance to clients with a complex range of needs, who require access to a broad range of services and different forms of assistance. Many clients need and use a wide range of services including housing, income, health, employment, education and training. For these reasons the Case Manager has to be a coordinator, and advocate and counsellor.

The Role of a Coordinator
1. Assesses the client's problems and the need for assistance from other helpers.

2. Develops a case plan.

3. Assists the client in making effective contracts with these helpers.

4. When necessary, facilitates communication among helpers to reduce conflicts and increase the effectiveness of the resource network.

The Role of an Advocate
1. Makes the needed assistance available.

2. If expectations/demands are overwhelming for a client, the Case Manager acts as an advocate to moderate the demands or to lessen the cost of not meeting the demands.

The Role of a Counsellor
1. Works with the client to help them develop and maintain a resource network for themselves.

2. Develops a relationship with the client, which permits an examination of any difficulties in the client's behaviour and facilitates the development of more useful patterns.

The Carmen Poldis Community Centre has identified eight key elements of Case Management. Figure 1 below shows how these tasks fit together. Note they are not simply carried out as steps one to eight. One or more tasks may occur at the same time and in practice, some elements, such as entry/screening and assessment may be combined. Note also that some processes such as assessment/re-assessment and monitoring and reviewing are ongoing.