Handout 3 - Developing a Case Plan

Planning is a process focused on identifying client needs, clarifying goals and hopes, setting priorities and identifying steps/actions necessary to achieve this. It is client-driven and empowers the client. Goals may be very small and concrete as well as longer-term and broad.

Planning is organised through the development of a support plan that addresses the needs of the clients as identified in the assessment process. The formulation of the case plan:

- establishes goals and expectations and identifies appropriate services for each client as perceived by the client;
- is developed on the basis of information collected during the assessment process, and;
- assists clients to identify short and long-term goals and develop action plans.

The case plan of the caseworker will be part of or reflect the priorities and strategies identified in the larger case management plan.

Developing a planning process

The key tasks in a planning process could include:

- identifying appropriate resources which the client needs to achieve their goals and meet their needs and;
- developing a written record of the plan, which the caseworker and the client can do together. Client issues which may be addressed in the support plan include the following:

1. What does the client need now to stabilise the current situation (crisis needs)?
2. What are the client’s long-term goals?
3. What is stopping the client from achieving these goals?
4. What can be done in the short-term to help achieve these goals?
5. What does the person want to achieve or resolve whilst a client of the caseworker?
6. What action does the client need to take?
7. What action can be taken by the caseworker?
8. What are the time frames for action?

NB. Clients should be given a copy of the support plan.

As caseworkers we need to remember that:

- Goals should be achievable. If the goals are broad they will probably need to be broken into smaller goals. Develop contingency plans so that if one goal cannot be met, there are alternatives.
- The scope of goal setting is proportionate to the service being provided. This means making sure that the number of goals as well as how broad they are can be met within the time allowed to the caseworker to support the client. If there are too many, prioritise, and make sure there is a mix of smaller and larger goals. Achieving some of the smaller goals early on is more likely to help the client feel capable of success.
- Make sure the client feels ownership of the plan, that they understand it, and have a copy written in their own words and language.
- Support plans should focus on achieving the skills or resources necessary for independence from the cased worker and should lead towards case closure.
Resistance to Planning

Resistance may occur in the following forms:
- Disbelief that things can change, or that change will last.
- Disbelief that the changes really are important ones to make
- Disbelief that they can change things (especially by engaging in new behaviours)
- Cynicism
- Inability to think clearly
- Inability to organise themselves
- Lack of motivation
- Impatience
- Hanging on to blaming others for the problems
- A feeling of not being involvement in the initial plan

Ways to counter this resistance:
- Empathy with client anxiety, uncertainty, exhaustion, other emotional burdens, lack of support from family, social isolation etc
- Encouragement
- Positive approach
- Work with others such as close friends, counsellors
- Negotiating smaller steps than originally planned
- Revisit plan if necessary