NEW RESOURCES TO STRENGTHEN CASE MANAGEMENT APPROACHES

Social Service Workforce Webinar Series

24th Webinar

7 March 2018

USAID
PEPFAR
4Children
GLOBAL ALLIANCE
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WEBINAR AGENDA

Summary of Alliance Case Management Interest Group and Sub-group Work
• Natia Partskhaladze, Senior Technical Advisor, Global Social Service Workforce Alliance

Core Concepts and Principles of Effective Case Management: Approaches for the Social Service Workforce
• Kelley Bunkers, 4Children Technical Director and Concepts and Principles Sub-group Co-chair

The Case Management Tools and Resources Compendium
• Severine Chevrel, 4Children Senior Technical Advisor and Tools and Resources Group Sub-group Co-chair

Q&A

Discussion of the Next Steps of the Work of CMIG
Convene and Connect

- 24 webinars, 4 Annual Symposiums
- Integration of workforce-focused panels in conferences
- Website member directory, discussion boards

Advance Knowledge

- Development and dissemination of tools, reports and case studies
- 3 Interest Groups and joint product development
- E-updates, blogs, website knowledge hub

Advocate

- Annual State of the SSW Reports and SSW Week
- Ambassador Program and Advocacy Toolkit
- Social Media Presence

Launched in 2013. Unites ~1700 members from 120 countries
Purpose
- Convene experts into task-focused and results-oriented groups to address an area of specific interest to the Alliance membership
- Gather and consolidate information on a specific topic
- Develop products intended to advance knowledge, discussion, and/or solutions related to a specific topic

CMIG Sub-groups
- Core Concepts and Principles Sub-group
- Tools and Resources Sub-group

Membership
- CMIG – up to 60
- Sub-groups – 20 in each
Kelley Bunkers
4Children, Co-chair of the Case Management Sub-working Group

Core Concepts and Principles of Effective Case Management
Why and How We Developed This Document

- Why did we develop it?
- How and who was involved in the process?
- Who is our intended audience?
- How do we recommend using this document?
Case management is a process practiced by social service workers that supports or guides the delivery of social service support to vulnerable children and families and other populations in need. Case management involves a process of: identification, enrollment, assessment, development and implementation of a case plan, coordination, monitoring and closure.
STEPS OF CASE MANAGEMENT

1. Identification; client comes to the attention of provider

2. Initial Screening

3. No Action Required

4. Assess/reassess, including eligibility for services and identify needs and strengths
   *If there are emergency or safety issues identified, these are immediately responded to i.e., finding a place of safety.

5. Case Plan

6. Implement

7. Review

8. Case Closed
PRINCIPLES OF CASE MANAGEMENT

- Increasing resiliency and improving quality of life
- Collaboration and partnership
- Do no harm
- Respect and promotion of client strengths
- Respect for diversity, culture and tradition
- Respect for and reflection of a human rights based approach
- Consent to participate in case management
- Confidentiality
- Assure quality in case management
WHO IS INVOLVED
COORDINATION IS KEY

- The Social Service Workforce, including:
  - paid and unpaid workers
  - professionals and para professionals
  - governmental and NGO employees
  - members of community-based coordination mechanisms such as child protection committees

- Allied workers:
  - the police, teachers, doctors, nurses, community health workers, magistrates, social security and labor office workers, religious leaders and others

- Coordination is key
RESOURCES REQUIRED TO IMPLEMENT CASE MANAGEMENT

Critical resources:
- Standard operating procedures and tools
- Trained workers
- Place for safe storage of confidential records
- Transport
- Telephone
- Place to hold meetings

Other considerations
- Documentation
- An emergency fund
- Incentive scheme/motivation
Severine Chevrel
4Children, Senior Technical Advisor
Co-chair of the Case Management Sub-working Group

GSSWA Case Management Tools and Resources Compendium
THE CASE MANAGEMENT TOOLS AND RESOURCES COMPENDIUM

- Aim of developing the Compendium
- Tools and resources available across different settings
- How to use the presented resources
- Next steps to enrich and improve the Compendium
Provide the most useful and relevant resources and tools to the wider membership of the Alliance, especially practitioners that reflect the core case management concepts and principles.
Subgroup on Case Management Tools and Resources

Framework to assess and recommend case management resources and tools to include in the compendium

Extensive efforts to collect, screen and assess tools and resources developed between 2009-2017: up to 60 reviewed

Collection of most useful resources assembled: total 25 documents
Case Management Compendium

This Compendium of Case Management Tools and Resources represents the work of the Alliance Case Management Interest Group. Given increasing interest among Alliance members on the topic of case management, the Alliance has established and supported the work of the interest group and its two subgroups on Concepts and Principles of Case Management and on Case Management Tools and Resources. Interest groups are comprised of Alliance members who contribute their expertise on thematic areas. Learn more about Alliance interest groups and their work.

Given increasing interest on the topic of case management, two subgroups contributed to new case management resources. Members developed Core Concepts and Principles of Effective Case Management: Approaches for the Social Service Workforce. The second sub-group reviewed tools and resources to compile this compendium, meant to be useful to audiences of various workforce levels and organizations, representing practices from humanitarian and development perspectives across different regions.

www.socialserviceworkforce.org/resources/compendium
- Global, regional and national with global applicability
- Represent practices from humanitarian and development perspectives
- Target broad range of audiences of various workforce levels and type of organizations: NGOs; Governments; UN agencies; Academic institutions; Professional associations and others who support the work of strengthening the social service workforce
- Focus on usefulness for practitioners
- Not intended to be an exhaustive list of all available tools
First edition of the Compendium being released today

Obtained permission for inclusion of each resource

Organized in the following categories:

<table>
<thead>
<tr>
<th>Categories</th>
<th># of documents available</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guidance on Core Concepts/ Principles</td>
<td>16</td>
</tr>
<tr>
<td>Standard Operating Procedures</td>
<td>11</td>
</tr>
<tr>
<td>Tools and Forms</td>
<td>13</td>
</tr>
<tr>
<td>Training Materials</td>
<td>6</td>
</tr>
</tbody>
</table>

Some resources included in more than one category
**Continued improvement**

- Feedback on existing resources & tools and how these are being used and adapted
- Share additional relevant documents: already existing and as they are available
- General feedback on how the Compendium can be further made relevant and applicable across different contexts
NEXT STEPS

- Identification of gaps and areas where additional guidance might be required
- Tools and resources potentially jointly developed by the Alliance Interest Group to address these gaps
If you have questions:

Please write your questions in the chat window

We will invite presenters to respond to your questions or comments
Discussion of the Next Steps of the Work of CMIG

Natia Partskhaladze

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Closing Remarks

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Thank you!

• If there are any events or opportunities that you would like to announce, please do so by typing information into the chat window.

• If you’re interested in joining the Alliance and receiving notices about future webinars, please visit www.socialserviceworkforce.org to register.

• If you are interested in joining the Alliance Casee Management Interest Group, first join as a member and then sign up on this page: www.socialserviceworkforce.org/get-involved/working-groups

• A summary and recording of this webinar, as well as each of the past 23 webinars, is available on www.socialserviceworkforce.org

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