

Social  
Service  
Workforce  
Webinar  
Series

24<sup>th</sup> Webinar

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2018

# NEW RESOURCES TO STRENGTHEN CASE MANAGEMENT APPROACHES



**Natia Partskhaladze**  
**Senior Technical Advisor,**  
**Global Social Service Workforce Alliance**

Moderator

# 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***

# THE ALLIANCE IS A GLOBAL NETWORK

## 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

# CASE MANAGEMENT INTEREST GROUP

## 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

# DOCUMENT ON CORE CONCEPTS AND PRINCIPLES OF EFFECTIVE CASE MANAGEMENT



CORE CONCEPTS AND PRINCIPLES  
OF EFFECTIVE CASE MANAGEMENT:  
APPROACHES FOR THE SOCIAL  
SERVICE WORKFORCE

GLOBAL SOCIAL SERVICE WORKFORCE ALLIANCE  
CASE MANAGEMENT INTEREST GROUP

1st Edition, January 2018

<http://www.socialserviceworkforce.org/sites/default/files/uploads/Case-Management-Concepts-and-Principles.pdf>

# WHY AND HOW WE DEVELOPED THIS DOCUMENT

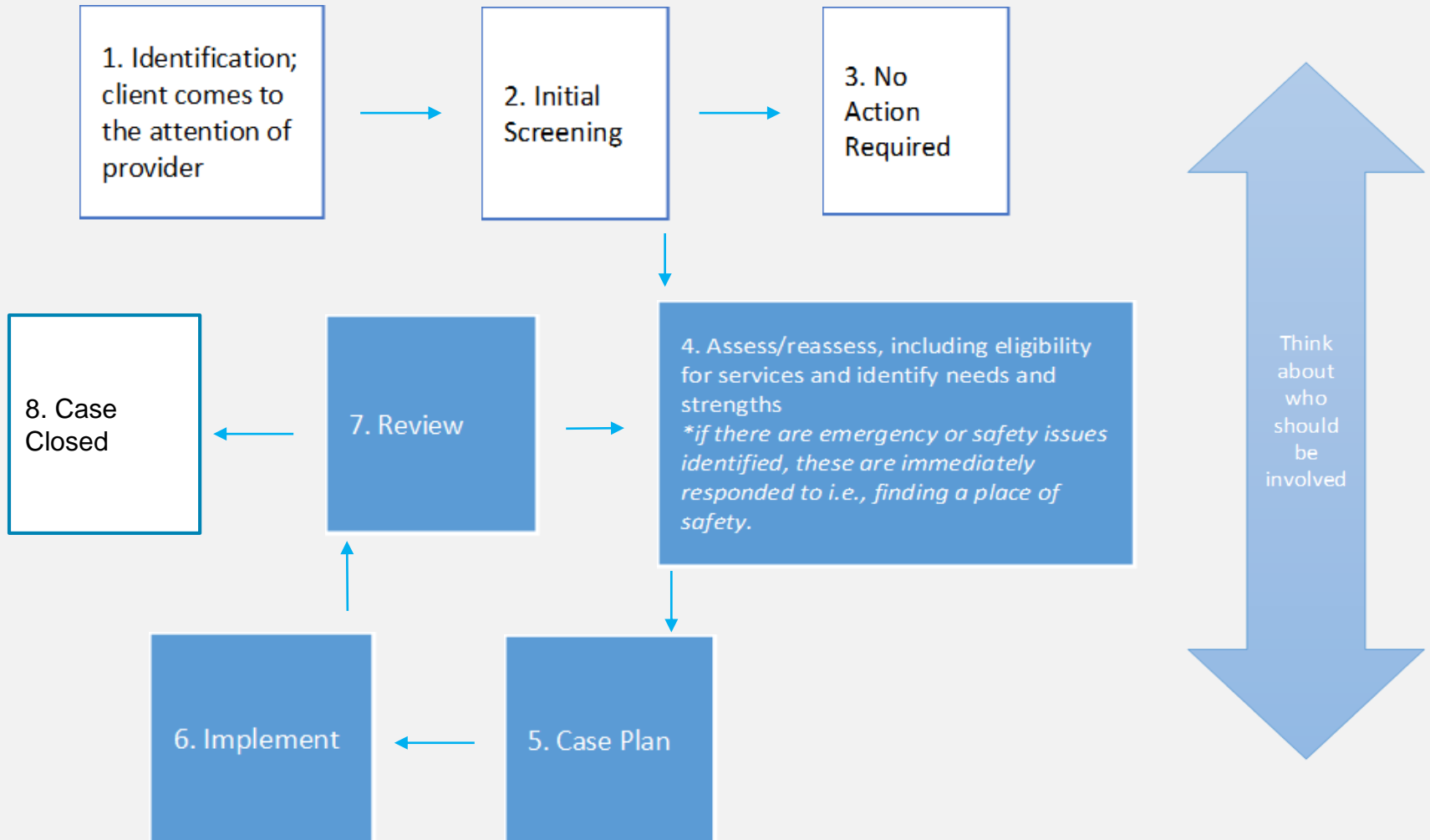
- Why did we develop it?
- How and who was involved in the process?
- Who is our intended audience?
- How do we recommend using this document?



# DEFINITION OF CASE MANAGEMENT

**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



# 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

# AIM OF 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



# PROCESS

- **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**

# THE CASE MANAGEMENT TOOLS AND RESOURCES COMPENDIUM

The Workforce || Resources || Get Involved || About Us || 

[Home](#) > [Resources](#) > Case Management Compendium

## 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.

Core Concepts and Principles

Tools and Forms

Standard Operating Procedures

Training Materials

This compendium is not intended to be a comprehensive source on case management. Open source documents are included with permission from their organizations/authors. This Compendium is in its first edition; its continued improvement relies on sharing with the Alliance additional relevant documents and how the tools have been used or modified.

The Global Social Service Workforce Alliance would like those who have contributed to the development of this Compendium, who are acknowledged within the Core Concepts and Principles document.

[www.socialservice  
workforce.org/reso  
urces/compendium](http://www.socialserviceworkforce.org/resources/compendium)

# RESOURCES & TOOLS AVAILABLE

- 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

# CASE MANAGEMENT COMPENDIUM

- First edition of the Compendium being released today
- Obtained permission for inclusion of each resource
- Organized in the following categories:

Categories	# of documents available
Guidance on Core Concepts/ Principles	16
Standard Operating Procedures	11
Tools and Forms	13
Training Materials	6

- Some resources included in more than one category

# NEXT STEPS

- **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**

**Questions  
and Answers**

**@SSWAlliance**

**[www.socialserviceworkforce.org](http://www.socialserviceworkforce.org)  
[contact@socialserviceworkforce.org](mailto:contact@socialserviceworkforce.org)**



Discussion of  
the Next  
Steps of the  
Work of CMIG

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Closing  
Remarks

**@SSWAlliance**

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**[contact@socialserviceworkforce.org](mailto:contact@socialserviceworkforce.org)**





## 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](http://www.socialserviceworkforce.org) to register.
- If you are interested in joining the Alliance Case Management Interest Group, first join as a member and then sign up on this page: [www.socialserviceworkforce.org/get-involved/working-groups](http://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](http://www.socialserviceworkforce.org)

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