

Practice Notes:

CASE MANAGEMENT: CONCEPTS & SKILLS

Excerpts from:

Arthur J. Frankel and Sheldon R. Gelman are the authors of *Case Management: An Introduction to Concepts and Skills* (Lyceum: Chicago, 1998). Available on-line: [<http://www.mtsu.edu/~socwork/frost/soc/thera/casemange.htm>]

What is Case Management?

"Case management as a way of helping people has a long and rich history." (p. 3).

"While the focus of case management is linking a client to needed services, other elements involve advocacy and social action" (pp. 3-4).

"If the goal is service access and coordination, the case manager's efforts are designed to alleviate or counter the fragmentation of services and the natural tendency of bureaucratic organizations toward disorganization. For the case manager to achieve this goal, the following elements or conditions must be present:

- An accurate assessment and ongoing evaluation of client needs;
- The ability to link clients to resources appropriate to their needs;
- The power to ensure that appropriate and needed services are actually delivered;
- The capacity to see that services are utilized" (p. 5).

Case Management Tasks

"Probably the most comprehensive listing of tasks required of and performed by case managers was developed by Bertsche and Horejsi in 1980. The thirteen basic tasks provide a clear and concise description of case management responsibilities:

1. Complete the initial interviews with the client and his or her family to assess the client's eligibility for services.
2. Gather relevant and useful data from the client, family, or other agencies, and so on to formulate a psychosocial assessment of the client and his or her family.
3. Assemble and guide group discussions and decision-making sessions among relevant professionals and program representatives, the client and his or her family, and significant others to formulate goals and design an integrated intervention plan.
4. Monitor adherence to the plan and manage the flow of accurate information within the action system to maintain a goal orientation and coordination momentum.
5. Provide 'follow-along' to the client and his or her family to speed identification of unexpected problems in service delivery and to serve as a general troubleshooter on behalf of the client.
6. Provide counseling and information to help the client and his or her family in situations of crisis and conflict with service providers.
7. Provide ongoing emotional support to the client and his or her family so they can cope better with problems and utilize professionals and complex services.

Practice Notes:

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8. Complete the necessary paperwork to maintain documentation of client progress and adherence to the plan by all concerned.
9. Act as a liaison between the client and his or her family and all relevant professionals, programs, and informal resources involved in the overall intervention plan to help the client make his or her preferences known and secure the services needed.
10. Act as a liaison between programs, providing services to the client to ensure the smooth flow of information and minimize the conflict between the subsystems.
11. Establish and maintain credibility and good public relations with significant formal and informal resource systems to mobilize resources for current and future clients.
12. Perform effectively and as a 'good bureaucrat' within the organization to be in a position to develop and modify policies and procedures affecting clients and the effectiveness of the service delivery system.
13. Secure and maintain the respect and support of those in positions of authority so their influence can be enlisted on behalf of the client and used, when necessary, to encourage other individuals and agencies to participate in the coordination effort" (pp. 15-17).

A Final Word

"The potential of case management to help people solve their problems, make better use of the available community and governmental resources, and work together to advocate and develop new and better resources is tremendous.... Case management programs can give their clients fish, fishing poles, and guidance to the lakes where the fish are. " (pp. 141-2).