



How Do You Know If You Have a Strong Case Management System?

What Is Case Management?

Case management is a collaborative process, which assesses, plans, implements, coordinates, monitors and evaluates the options and services required to meet an individual’s health, physical, emotional, social, etc., needs

Why Is Case Management Important?

- It increases awareness and collaboration among program case managers, directors, general staff, and participants;
- An effective strategy allows you to document and measure participant progress (remember – “if an activity isn’t documented, then, it didn’t happen”);
- It facilitates smooth implementation and delivery of services;
- Finally, because it puts at your fingertips critical information that most funders requires

Getting Started: 7 Key Strategies that may help you create a solid case management foundation:

Although there are myriad aspects that can constitute a good Case Management system, you might find this review of Portland YouthBuilders helpful in your quest to establish a system that meets your programmatic, reporting, and compliance needs.



Portland YouthBuilders (PYB) in Portland, Oregon, has been practicing and perfecting their case management operations since 1995. Case Management at PYB is a system of core support services provided to assist students’ progress in their career pathways. It allows students to develop a precise plan for barrier removal, asset development, career identification, completion of key competencies and credentials, and placement and advancement in vocational and/or post-secondary educational settings.

- 1) Early Intakes It is important to make sure that all incoming students receive an early intake during which time a strengths-based functional assessment is made. This gives the student an experience of being attended to early on and provides staff members with key information about a student's barriers and resources. Early goal setting arises from the functional assessment and gives both the student and staff members a road map for early



intervention. At a minimum, a functional assessment should identify strengths and barriers in areas such as income, housing, childcare, physical and mental health, drug and alcohol behavior, relationships, transportation, and childcare.

- 2) **Assigned Counselor** Students benefit from strong attachments to key staff. Their Counselor can be a person of contact throughout their entire program experience who focuses on self-assessment, self-reflection, and self-development. This person can provide support, direct goals, advocate for the student with other staff, and, in general, act as a hub for services that helps coordinate the student experience.
- 3) **Regularly Scheduled Meetings** Each and every student benefits from regular contact with their Counselor, regardless of perceived level of need. When students meet with their assigned counselors at regular intervals, proactive planning for barrier removal and asset development is possible. Crisis interventions are decreased, students learn to anticipate when and how to avert or diminish problems, and lasting progress toward stabilization can be achieved.
- 4) **Small Group Experience** Students can be clustered into small groups for life skills instruction and group process experience. In this way they develop natural networks and experience positive new attachments and a feeling of inclusion for themselves and others. They learn about positive communication, how to use their individual strengths in service of a larger group, and can be instructed in social issues that have more pertinence with their peers than they do in individual meetings with their Counselor.
- 5) **Individualized Career Coach Assignment** Early assignment of a Career Coach allows a student to develop a working relationship with one staff member who helps provide critical shaping to a student's career pathway. Individualized coaching allows for targeted research, self-assessment, and feedback on career suitability. This helps assure that the student lands a placement in the right field for his or her particular interests, talents, and career goals.
- 6) **Assigned Case Management Teams** While students benefit tremendously from individual relationships with teachers, trainers, counselors, and career coaches, regular interdisciplinary review of students provides a means for comprehensive and collaborative student support. The varied points of perspective and the nature of communication in



interdisciplinary teams uncover issues and ideas that do not arise in one-on-one interactions. Students also learn effective presentation and advocacy skills by representing themselves on these teams. The well-informed and coordinated effort of a whole team of supporters makes a big impact on student success.

- 7) Long Term Post-Program Support Successful placement in career related employment and/or post-secondary education and training is the next step for a student after full-time YouthBuild programming. In order to achieve long-term career success, it is imperative that students continue to receive structured support. Face-to-face check-ins are scheduled at regular intervals and goals and services are built upon ongoing assessments of student need for stabilization and advancement in their placement setting.

For more information or questions on Portland YouthBuilders Best Practice for effective Case Management, feel free to contact Nancy Pearson, LCSW by email: nancy.pearson@pybpdx.org