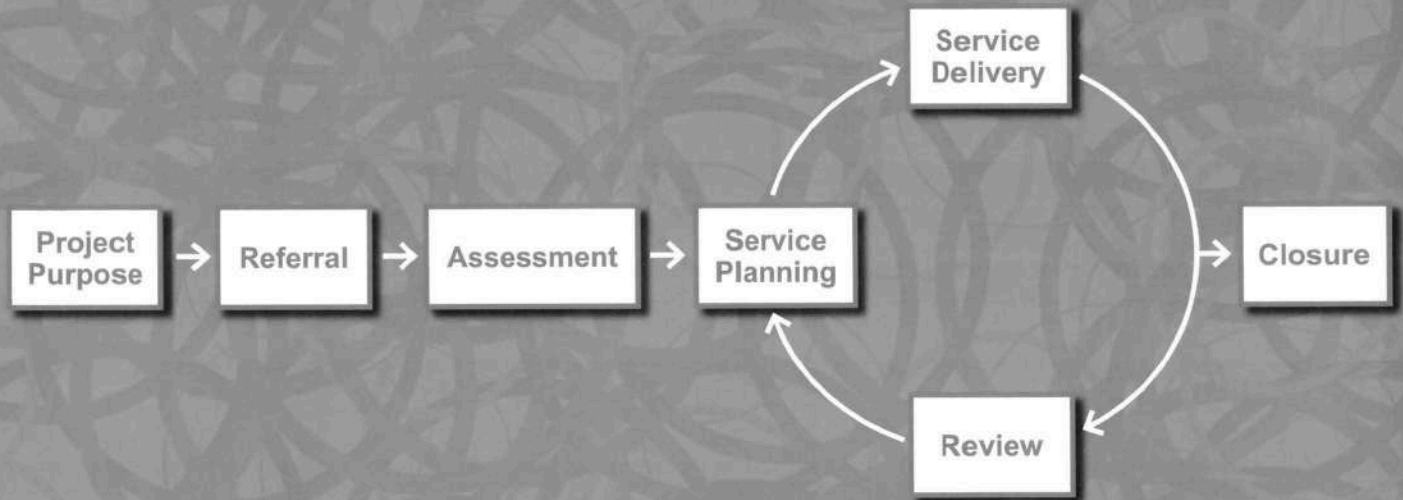




Barnardos

Barnardos' Active Case Management





Barnardos' Active Case Management Definition

Active Case Management (ACM) provides a framework to ensure we manage our work with children and families effectively. It is a key mechanism for planning and reviewing our work. It ensures we plan services in relation to children's needs in order to achieve our planned outcomes.

ACM helps us to keep our work focused, bringing it through a process of beginning, middle and end, and so reduces the likelihood of drift and dependency. It plays a key role in ensuring that children and families receive a quality service during their time with Barnardos.

The case manager is the key worker's line manager and the person responsible for the supervision of the case.

Suzanne Connolly _____

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Director of Children's Services

Project Purpose

It is both obvious and important that managers have a clear understanding of their project's purpose, which they are able to discuss and articulate with staff, based on:

- The eligibility criteria and the remit of the project.
- Its connection with Barnardos' strategic outcomes of *improved emotional wellbeing* and *increased capacity to learn and develop*.

This is the basis for deciding which children and families will be able to benefit from the services the project provides.

Referral

Referrals can be received from professionals and directly from families themselves. The role of the case manager in referral is to:

- Check the eligibility criteria – is the case suitable, can the project meet their needs?
- Acknowledge receipt of the referral in writing. If necessary, inform the referrer that the case is on a waiting list and that it remains unopened until allocated.
- Manage the waiting list – review the waiting list periodically until a space becomes available.
- Confirm acceptance or non-acceptance of referral in writing to the referrer.
- Co-ordinate visits by the key worker to the family to provide information about the project, discuss the referral and explain and get signatures for the working agreement and consent.
- Co-ordinate and chair a referral meeting, inviting the family, key worker and referrer.
- Identify immediate needs¹ arising and create a plan to respond to these needs.
- Support staff to explain the need for assessment to families, and to get their consent.

¹ Immediate needs such as homelessness, money difficulties, school placement, advocacy / referral to other agencies.

Assessment

Using the Barnardos Assessment Framework (BAF), a picture of the needs of every child referred to Barnardos is gained by considering six domains: *living environment, relationships and attachments, behaviour and social participation, health (physical and psychological), learning, education and employment and identity, self-care and self-esteem*. From these needs, desired outcomes and the services or interventions are identified that are most likely to achieve the outcomes. The needs, outcomes and services then inform the service plan. The role of the case manager in assessment is to:

- Supervise the key worker in carrying out an assessment, deciding together what level of assessment is required (*Stage 1 Assessment* or *Stage 2 Assessment*) in supervision.
- Consider whether there are child protection concerns which need notifications and/or discussion with the HSE.
- Consider whether there are child welfare concerns.
- Create an hypothesis about the connections between risk, protective factors and needs.
- Sign-off the completed assessments.

Service Planning

A service planning meeting chaired by the case manager should take place between the family, the key worker, the referrer and any other relevant professional. Use the needs and outcomes identified in the assessment to agree a service plan and timeframes, including a date for review.

The service plan should be reviewed on a regular basis through case supervision and regular review meetings. The role of the case manager in service planning is to:

- Discuss the assessment findings with the key worker prior to the meeting to ensure the worker feels prepared to present the findings in a clear, concise, accessible way.
- Ensure the key worker has prepared the child and family for the service planning meeting, i.e. the child and family understand the purpose of the meeting and what is likely to be discussed.
- Chair the service planning meeting.
- Ensure service planning is respectful and inclusive of any diverse needs or circumstances.
- Establish and agree the roles and tasks of all participants.
- Set timeframes and a review date.
- Ensure the service plan section in the assessment form is completed.

Service Delivery

Service delivery follows the completion of the assessment and the service planning meeting. This is when a key worker delivers services to address the needs and outcomes identified in the service plan section of the assessment. The role of the case manager in service delivery is to:

- Supervise the key worker in delivering services. These should reflect the service plan and the agreed timelines.
- Ensure work is focussed, while being flexible to accommodate new or emerging needs. It is a key skill of the case manager to distinguish between appropriate flexibility in practice and practice that is becoming reactive and unfocused.
- Summarise key case discussions and decisions on case management forms.
- Ensure that the key worker is working effectively with other agencies involved in the case.
- Maintain an up-to-date understanding of the case, using information from the key worker's supervision, meetings and the case file.
- Ensure that record keeping reflects Barnardos' policy and practice standards.

Review

The purpose of the review meeting is to consider the progress of the service plan which was established following the completion of an assessment. During the review the family, key worker, referrer and any other relevant professional(s) examine the progress made on achieving outcomes, considering the assessment and previous reviews. The review may identify new needs, so the service plan needs to be updated to reflect any newly identified needs, outcomes and services. The role of the case manager in review is to:

- Ensure the key worker has shared reports and assessments with the parents, and children where appropriate, in preparation for review meeting.
- Discuss and prepare for the meeting with the key worker prior to the meeting.
- Chair the meeting.
- Review the service plan and examine whether outcomes are being achieved.
- Facilitate the development of an updated service plan (needs, outcomes, services).
- Set the next review date (no later than 3 months).
- Ensure that the review form is completed, circulated appropriately and stored in the client file.

Closure

Closure of a case should happen when the outcomes have been achieved, the family disengages, or the outstanding needs are outside the remit of the Barnardos service. The role of the case manager in closure is to:

- Identify and agree the point of closure with key worker.
- Ensure key worker has prepared the family for closure.²
- Where possible³, chair and facilitate a closure meeting.
- Identify any outstanding needs that require a referral to another agency and, if necessary, make the referral.
- Acknowledge the work everybody has put in and celebrate the achievement of outcomes.
- Facilitate and record feedback and reflection by participants.
- Ensure completion of *closure form* on all cases and its circulation to the family, referrer and any other relevant professional.
- Hold a debrief session in supervision with the key worker, reflecting on learning, challenges and skill development. Acknowledge the effectiveness of the key worker role.

² Preparation with the family can include highlighting their strengths and abilities, celebrating outcomes that have been achieved, providing them with information on how to re-refer to Barnardos if the need arises.

³ In circumstances where the family disengage a closure meeting may not be possible.

Other Tasks which Support Case Management

- Read case files regularly.
- Meet children and parents informally as they attend services.
- Facilitate team discussions and supervision on the learning and challenges from the case.
- Keep up-to-date with best practice models and research.
- Ensure the database is updated regularly.
- Use your own supervision sessions to develop your skills and awareness, and to reflect on your own learning and development from managing the case.

