



Curriculum



Workbook 5

**MODULE 4 – EFFECTIVE CASE
MANAGEMENT**

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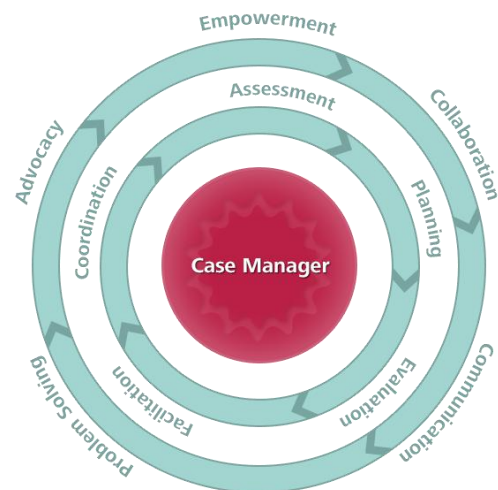
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MODULE 4 – EFFECTIVE CASE MANAGEMENT

4.1 What is this module about?

This module is about case management, i.e. the “collaborative process of assessment, planning, facilitation, care coordination, evaluation, and advocacy for options and services to meet an individual's and family's comprehensive health needs through communication and available resources to promote quality, cost-effective outcomes” (Case Management Society of America). Even though this definition focuses on healthcare as most definitions of case management do, it is still valid and transferable to other sectors and domains.

The most important feature of a job-broker's role is that s/he works with people. And even though people share common characteristics and even common identities in some cases, each person remains unique. Moreover, each person's mix of needs, attitudes, stances, beliefs, abilities, competences and skills are unique to that particular person. Thus, case management skills are crucial for job brokers, because they facilitate personalised, tailor-made consulting and solutions for each client, in an integrated and accountable manner.



According to Hahn et al. (Case Management with At-Risk Youth. Hahn, A., Aaron, P., & Kinglsey, C. The Centre for Human Resources, Brandeis University) common Definitions of Case Management include:

- “activities aimed at linking the service system with a consumer, and coordinating the various system components to achieve a successful outcome.”
- “a problem-solving function designed to ensure continuity of services and to overcome systems rigidity, fragmented services, misuse of certain facilities, and inaccessibility.”
- “At the systems level, case management may be defined as a strategy for coordinating the provision of services to clients within that system.”

- “At the client level, case-management may be defined as a client-centred, goal-oriented process for assessing the need of an individual for particular services and obtaining those services.”

4.2 Learning Objectives

- Demonstrate effective case management by responding to the needs of service users and providing effective follow-up
- Explain the main principles of time management in relation to the role of the job broker
- Describe principles of effective teamwork and how this may impact on your role as job broker
- Identify suitable referral partners for signposting and progression
- Categorize different target groups of job seekers/employers and their specific needs.
- Develop effective procedures, protocols and standards to ensure high quality service provision
- Plan the day by prioritizing all your tasks to ensure you meet all deadlines
- Utilize relationships to other stakeholders and especially other job brokering providers in order to concentrate organisational resources and to develop job brokering services that best serve the needs of specific target groups.
- Evaluate yourself based on the self-assessment criteria and decide on improvement.
- Demonstrate the ability to deliver, monitor and evaluate customer satisfaction as a means of continuous customer service quality improvement

4.3 Understanding Case Management

ACTIVITY 4.3.1



To demonstrate effective case management you need to respond to the needs of the jobseekers. To perform this well it is important for you to investigate the needs of the service users. This can be done by “on the job investigation”. While interviewing jobseekers you can collect information about their priority needs in their job search activities. You should not perform this investigation very formally, but include it in your interview on a day to day basis. Set up a list of questions that can fit into your typical interview, but at the same time think of the questions as a part of this investigation that can help you formulate your case management. Keep in mind that it is important to give the jobseeker a hint in which direction to look, both internal and external, considering the main needs for a successful job search. Ask about personal strengths, about educational needs, about networking etc.

ACTIVITY 4.3.2

Identify and list up referral partners that can be of a help for signposting and progression in the case management with jobseekers. Please add all the possible partners you can think of in these different sectors:

Public Employment Service:

Private Employment Service:

VET provider:

Career Advising Company:

Employment Policy Maker:

VET Policy Maker:

Rehabilitation Service Centre:

On the Job Training Centre:

Other:

ACTIVITY 4.3.3



It is important for Job Brokers to categorize different target groups of Job Seekers and it is also important to categorize different target groups of Employers. In this group discussion you will work together on this particular categorization and please keep in mind to come up with any possible category you think of in both sections, Job Seekers and Employers. In addition it is important that you identify the needs of each target group as you can see an example of here below.

Job Seekers		Needs		Employers		Needs
Young Job Seekers				Constructing sector		
Age 18 - 24				Carpenters		
Age 25 - 29				Electricians		
Low Education				Plumbers		
High Education				Painters		

ACTIVITY 4.3.4

In your profession as a Job Broker it is important to utilize relationships to other stakeholders and especially other Job brokering providers in order to concentrate organisational resources and to develop job brokering services that best serve the needs of specific target groups.

In this activity we will ask you to have a look, holistically, on the professional environment that you are working in and present an idea of how to cooperate with your colleagues in the field, i.e. stakeholders, job brokering providers and all other resources you can think of that could be of any assistance or backup in your project. Think out of the box, think out of your comfort zone and give any kind of a professional a chance, as long as you can foresee his/her part in the puzzle of an effective Job brokering project. Think about your categorization before and the needs of the job seekers and match all the possible resources to that.

Please prepare a 15 minutes presentation about your idea.

4.4 Managing your time effectively when dealing with case management

ACTIVITY 4.4.1



Task 1: Identify important and urgent activities

The tool shown below is a time management tool that categorises activities according to importance and urgency

	Urgent	Not Urgent
Important	Crisis Projects with deadlines Pressuring problems Meeting Suggestions	Preparation activities Prevention activities Planning activities Building relationships Entertainment Empowerment
Not Important	Visitors Telephone calls Some mail Some meetings Social Activities e.g. weddings etc.	Details Junk mail General loosing of time 'Escape activities' e.g. going to the toilet or making coffee

Think about the activities that you implement daily as a job broker. Go back to yesterday for example and think what have you done (it is even better if you write down all your activities one day ie keep a log. Then try to classify these activities into important and urgent. Use the following diagramme to record them

	Urgent	Not Urgent
Important	1. 2. 3. 4.	1. 2. 3. 4.
Not Important	1. 2. 3. 4.	1. 2. 3. 4.



Of course it will all depend on the activities you have implemented but here are some examples.

- If you have a job seeker calling you that he or she has been verbally invited to an interview the day after tomorrow and he or she needs help in preparation for the interview, then it is an urgent and important activity.
- If you start preparing your job seekers for interviews even before they have any then this is a not urgent and important activity.
- Similarly developing good relationships with employers in a not urgent and important activity
- Having short breaks is a not urgent and not important activity. Similarly gossiping with your colleagues at the office
- Some visitors that may pop in your office without appointment for something that is urgent but not important. it may be important for them but not for you (e.g. requiring favours)

ACTIVITY 4.4.2



Prioritise the above mentioned activities mentioning when you should do each and how much time you should allocate in each

Activities (Right them down in the order you should perform them)	Here characterize the time you should allocate to each by mentioning “allocate significant amount of time” or “try to do it very quickly”
1.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
2.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
3.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
4.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
5.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
6.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
7.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
8.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
9.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly
10.	<input type="checkbox"/> Allocate significant amount of time <input type="checkbox"/> Try to do it very quickly



Make sure that you schedule urgent activities first. Then allocate time according to their importance i.e. important activities receive more time.

4.5 Working in teams with key stakeholders to produce necessary results

ACTIVITY 4.5.1



Effective team work is an important part of a Job Broker's profession. In this learning activity we ask you to take part in a role play with another Job Broker and the task is to be in different positions as listed here:

Job Broker		Job Seeker				
Job Broker		Job broker				
Job Broker		Employer				
Job Broker		VET professional				

Take at least 15 minutes for each session and take your role seriously. You have to negotiate with your partner about who takes each role at a time. During the role play please have in mind the principles of an effective teamwork. When the role play is over please discuss the main principles of an effective teamwork that you have thought of and list it up. Please come up with at least 10 main principles of an effective team work.

4.6 Quality assurance in case management

ACTIVITY 4.6.1



In this activity you are required to develop a procedure or a protocol for case-management for job brokers in your organisation. In particular, imagine you have been assigned with the task of creating a tool for taking case history interviews from your clients. This is an important task, because in your organisation 4 job brokers are employed, thus it is crucial to ensure that all 4 follow the same procedure in filing and recording cases. An example of a case history is provided below:

The case you will have to handle has the following characteristics:

John is a married man from Cyprus. He has two kids, 11 and 8 years old, a boy and a girl respectively. John has recently been fired from his previous job where he worked for the last three years. This job was in a walking distance from his home, so he used to walk there every morning. 12 months have passed since and he is still unemployed.

In his previous job he used to be a sales person for furniture. No training was provided to him whatsoever by his previous employer, on sales techniques, customer support or anything else. Nevertheless he likes this job because he likes human interaction and he likes the product (furniture), because his hobby is woodworking and he has set up a small woodworking workshop in his back yard. During the last six months he did not put any effort in finding a job, nor is he motivated or active in this direction. He believes that he's too old, too incompetent etc.

TASK 1

In the table below write **all** the information provided in the paragraph about John. In the 1st column (type of information) you should write general descriptions, such as “Gender”, “Previous experience”, etc. In the 2nd you should provide information about John, relevant to each type of information. Take care to provide short, coded but recognizable descriptions (e.g. 2 kids, married, etc.)

Type of information	John's situation

TASK 2

- Identify the relevant and irrelevant information for a job broker (mark with ✓). In other words, which of the information recorded on the previous matrix is useful for a job broker

Information	Relevant	Irrelevant

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- ***Justify your answer.***

TASK 3

Identify missing information. What else would you want to know about John?

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

TASK 4

Categorise in the matrix below, the relevant information you identified in TASK 2 into different categories (e.g. skills, interests, stances, attitudes, needs, etc.)

CATEGORY	INFORMATION
	1.
	2.
	1.
	2.
	1.
	2.
	1.
	2.
	1.
	2.
	1.
	2.

TASK 5

Can you prepare a questionnaire for acquiring a case history, based on the important information you identified and those that are missing? Write the questions in the first column and the type of possible answers in the second (e.g. open question, multiple choice, scale from 1 to 5, etc.)

CASE HISTORY QUESTIONNAIRE

QUESTION	QUESTION TYPE



TASK 1

Information (Type of information in parenthesis):

- *male (Gender)*
- *married (family status)*
- *Cypriot (nationality-cultural background)*
- *two kids (family status)*
- *11 and 8 years old (family status)*
- *a boy and a girl (family status)*
- *fired (occupational status)*
- *employed for the last 3 years (experience)*
- *walking distance from his home (it could be needs, in case he can't drive)*
- *unemployed for 12 months (occupational status)*
- *sales person for furniture (experience)*
- *No on-the-job training (qualifications)*
- *he likes human interaction (stances and attitudes)*
- *he likes furniture (hobbies, interests)*
- *his hobby is woodworking (hobbies, interests)*
- *he has set up a small woodworking workshop in his back yard (pastime activities)*
- *During the last six months he did not put any effort in finding a job (stances and attitudes)*
- *He is not motivated or active in finding a job (stances and attitudes)*
- *Etc.*

Compare your answers with those provided. How many are similar? Bare in mind that there is no wrong answer. This feedback is provided in order to facilitate reflection on your own answers.

TASK 3

Examples of missing information:

- Qualifications (formal, non-formal, informal)
- Previous experience (before the last job)
- Age
- Ability to drive
- Special needs
- Other interests
- Needs (financial, personal, etc.)

- Etc.

TASK 4

Example:

CATEGORY	INFORMATION
FAMILY	1. Married
	2. 2 kids

ACTIVITY 4.6.2



Can you develop a procedure (including a tool, such as a questionnaire) for a job broker's self-evaluation? Include the aspects of a job broker's role you consider important. Please describe also the process you are going to follow in order to develop this procedure/protocol.

You are encouraged to do your own research both on a job broker's role and occupational profile (job broker website) and self-evaluation procedures and tools. Resources that might help are included below:

<http://www.businessdictionary.com/definition/self-evaluation.html>

http://www.hr.virginia.edu/uploads/documents/media/Conducting_a_Self_Evaluation.pdf

<http://www.cio.com/article/2386859/careers-staffing/careers-staffing-10-tips-for-making-self-evaluations-meaningful.html>

While developing your procedure, pay special attention to:

- **PURPOSE** (WHY?)
- **POLICY** (WHAT?)
- **USER INVOLVEMENT** (WHO/FOR WHOM?)
- **CLARITY**
- **ACCURACY AND COMPLETENESS**
- **FEEDBACK AND CONTROL**
- **MEASURABILITY**

ACTIVITY 4.6.3



Based on your research on procedures in the previous activity, in this activity you are asked to develop procedures and tools concerning customer satisfaction.

TASK 1

Identify the clients (Stakeholder types, e.g. job seeker, funder, etc.) in your organisation and decide on criteria and indicators for measuring:

- Effectiveness of your work (e.g. time effectiveness etc.)
- Satisfaction (of each target group)
- Other dimensions

Then, complete the matrix provided below. In the first column you should write your criterion or indicator type, i.e. the aspect you want to measure. Next to that in the column with the a, b, c numbering, you should indicate the specific **measurable** elements that you will measure in order to evaluate your customer service. Next to that, you are required to indicate the stakeholders types for which it is relevant. Also, in the stakeholder type columns, you can write indicators, for example if an indicator is score in evaluation, you can also provide the score you would consider acceptable, etc. You can insert as many columns as you need.

EXAMPLE:

Criteria - indicators		Stakeholder type 1	Stakeholder type 2	Stakeholder type 3
CRITERION – INDICATOR 1: Time effectiveness	a. Average waiting time in the lobby should be less than 20 min.	CLIENTS		
	Reporting should never be delayed beyond deadlines		FUNDER	

Criteria - indicators		Stakeholder type 1	Stakeholder type 2	Stakeholder type 3
CRITERION – INDICATOR 1:				
CRITERION – INDICATOR 2:				

ACTIVITY 4.6.4

Based on what aspects you identified as important in the previous activity, can you create tools (e.g. questionnaires) that measure customer satisfaction? Bare in mind that depending on the number of your target groups identified in the previous task, you might be required to develop more than one tool.

Create on questionnaire for each of the stakeholder groups your organisation works with. Each questionnaire should contain at least 10 questions. They can be Likert scales, open ended, multiple choice etc.



In case you are not familiar with questionnaire development, the guide provided below will prove valuable.

<http://blog.clientheartbeat.com/customer-feedback-questionnaire/>

4.7 Conclusion and further reading

In this section various action learning based activities have been provided, along with an introduction to case management for job-brokers. The most important conclusions of this chapter are summarised below:

Case management seeks to make service delivery:

- ... *Integrated*
- ... *Client-Centred*
- ... *Coordinated*
- ... *Goal Oriented*
- ... *Accountable*
- ... *Flexible*
- ... *Sequenced*
- ... *Cost-Effective*
- ... *Sustained*
- ... *Comprehensive*

On the following table, the types of activities included in chapter 6 are listed, along with the learning objectives of the chapter:

LEARNING OBJECTIVES	ACTIVITY										
	1: Research	2: Example	3: Role Play	4: Ideas	5: Examples	6: Lists	7: Group Discussion	8: Assignment	9: Case Study	10: Research	11: Group Discussion
Demonstrate effective case management by responding to the needs of service users and providing effective follow-up	X										
Explain the main principles of time management in relation to the role of the job broker						X					
Describe principles of effective teamwork and how this may impact on your role as job broker							X				
Identify suitable referral partners for signposting and progression				X							
Categorize different target groups of job seekers/employers and their specific needs.				X							
Develop effective procedures, protocols and standards to ensure high quality service provision				X							
Plan the day by prioritizing all your tasks to ensure you meet all deadlines			X								
Utilize relationships to other stakeholders and especially other job brokering providers in order to concentrate organisational resources and to develop job brokering services that best serve the needs of specific target groups.									X		

LEARNING OBJECTIVES	ACTIVITY										
	1: Research	2: Example	3: Role Play	4: Ideas	5: Examples	6: Lists	7: Group Discussion	8: Assignment	9: Case Study	10: Research	11: Group Discussion
Evaluate yourself based on the self-assessment criteria and decide on improvement.	X			X							
Demonstrate the ability to deliver, monitor and evaluate customer satisfaction as a means of continuous customer service quality improvement								X			

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