Professionalizing Case Management

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The role of a case manager

The role of the case manager is critical for setting the tone of expectations for clients, providing support, establishing trust, and connecting clients with resources. It is essential that case managers receive sufficient training, professional support, and guidelines to effectively meet their responsibilities to their clients and to avoid burnout. Case managers may need case management skills to prepare them for developing service/case plans (Anderson, 2001).

Importance of professionalizing case management

- **More effective case management.** If skillfully conducted the personalized case plans could empower clients to make choices about the education, training, work, and support services that can best improve their situation
- **Creates a supportive environment.** It builds trust.
- **Presents a positive model for clients.** Client choice and decision-making maximizes client growth and autonomy.

Techniques or approaches to facilitate professional case management

- Establishing and implementing code of ethics and behaviors
- Professional boundaries
- Case review and clinical supervision processes
- Teaching and facilitating "self-reflection"

Establishing & implementing a code of ethics and behavior:
What is our ethical duty?

Case management is an ethical guided profession obligated to its clients and to the society at large. To fulfill this role, supervisors can use the NASW Code of Ethics to create a ethical framework that would direct practice.

Purpose of the NASW Code of Ethics

- Help social workers identify relevant considerations when professional obligations conflict or ethical uncertainty arise,
- Provide ethical standards to which the general public can hold the social work profession accountable, and
- Articulate standards that the social work profession itself can use to assess whether social workers have engaged in unethical conduct (Jayaratne, Croxton & Mattison, 2002).

Professional Boundaries

Clear professional boundaries are necessary to prevent the perception that case managers have power arbitrarily. Case planning and service provision needs to be described within well-defined boundaries and expectations understandable to both workers and clients. Professional boundaries also include understanding "conflicts of interest."

Case review and clinical supervision processes

- Supervision has been highly valued in developing and enhancing clinical skills and practice of clinicians. There is growing evidence of the positive impact of supervision, mitigating burnout and assisting with the retention of staff (Muskat, 2013).

- Group supervision is a "negotiated process whereby members come together in an agreed format to reflect on their work by sharing their skills, experience and knowledge in order to improve both the individual and group capacities" as well as enhance services for client (Hughes, 2010, p. 67).

- Structure, focus and frequency of supervision. Greater frequency of supervision is associated with higher levels of satisfaction, with one study reporting a minimum of two hours per week as a perquisite to job satisfaction and retention for U.S. urban child welfare workers (Hughes, 2010).

Make time for Self-Reflection

- Case managers should be knowledgeable about the clients they are serving

- Case managers must be self-reflective and to recognize biases within themselves and within the profession

- Case managers must be able to integrate this knowledge and reflection with practice skills (Weaver, 1998).

Professional Development

- Training; ongoing guidance
- In-service training/staff development
  - interpersonal relations, customer relations, and time management and writing case notes

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