

Case Management in SSN Programs and Social Services

Social Protection & Labor Global Practice

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Case Management

What do we mean?

Case Management?

- Is a collaborative process that assesses, plans, implements, coordinates, monitor and evaluates the options and services required to meet the client's needs.



MAIN PROCESSES

1. Needs assessment
2. Planning and implementing services
3. Advocacy
4. Making appropriate linkages with service providers
5. Monitoring the delivery and use of relevant services

Case Management?

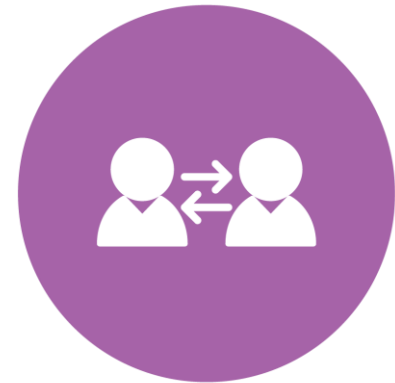
- A comprehensive approach to addressing the complex challenges faced by SP clients, which usually cannot be addressed through a single program or intervention.
- Personalized relationship.
- Client-oriented.
- Outcome-driven.

Case Management seeks to make service delivery ...

- ✓ Integrated
- ✓ Coordinated
- ✓ Accountable
- ✓ Sequenced
- ✓ Sustained
- ✓ Client-oriented
- ✓ Goal-oriented
- ✓ Flexible
- ✓ Cost-effective
- ✓ Comprehensive



Key features for Case Management



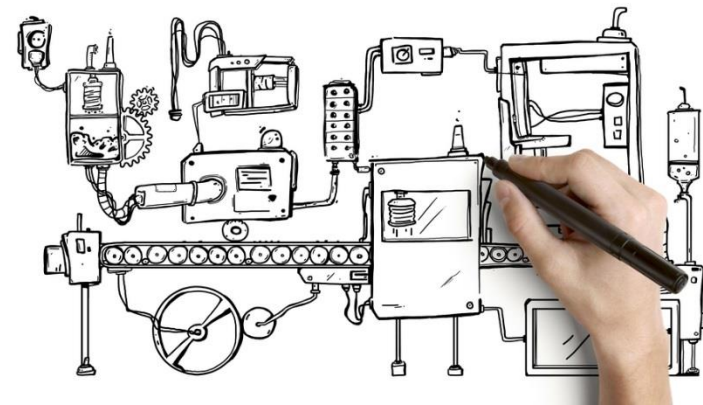
Key features for a successful case management intervention

- ✓ Well-designed intervention
- ✓ Linkage function
- ✓ Referral mechanisms
- ✓ Staffing and caseload
- ✓ Information system

Adequate financial resources – appropriate legal framework – atmosphere of client trust and satisfaction

1. Well- designed intervention

- Results-oriented (for both, clients and staff)
- Clear framework for client accompaniment (from initial screening to completion)
- Tailored to client's needs and local context
- Client goals are achievable and not burdensome
- Complementary to existing programs and services
- Specific timeframe



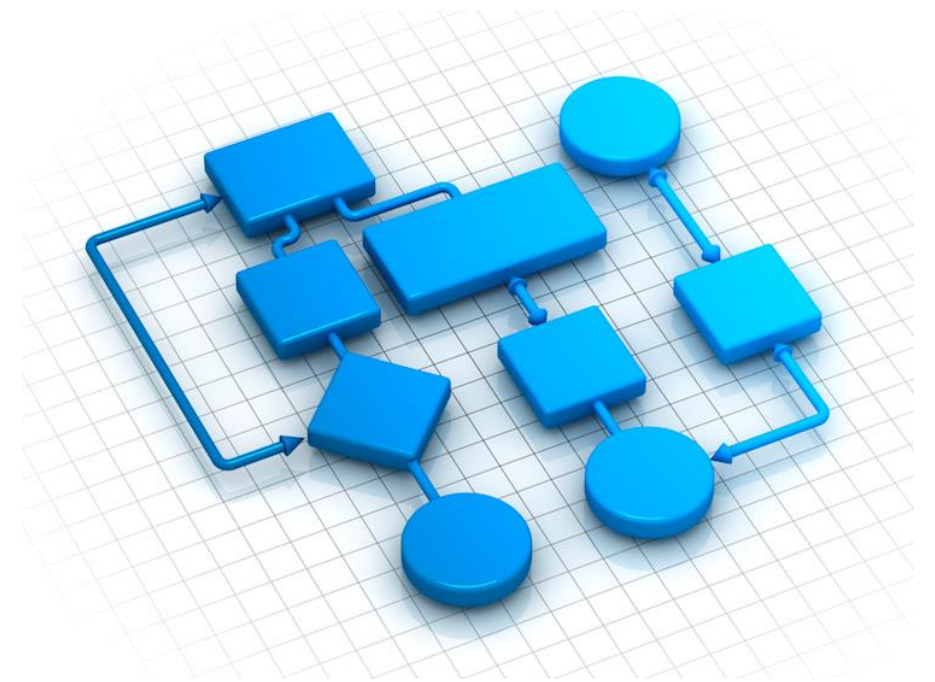
2. Linkage function

- Connecting clients to complementary programs and services.
- Well-established inventory of programs.
- Appropriate information on programs capacity and enrolment conditions.
- Deep knowledge on clients needs.
- Well-developed relationship with service providers



3. Referral mechanisms

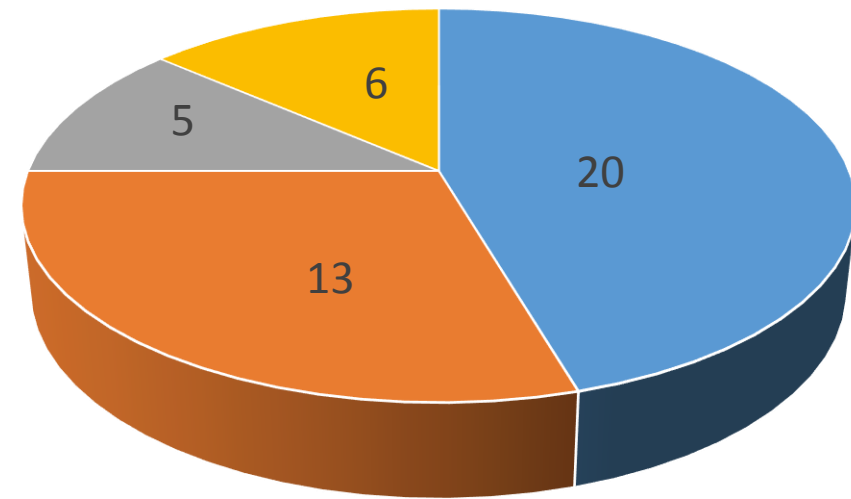
- Well-established protocols for referring clients to complementary programs and services.
- Referral and counter-referral.
- Agreements on granted preferential access for case management clients.
- Timely and clear reporting, monitoring and evaluation of effectiveness of referral processes.



4. Staffing and caseload

- Well-trained (in-job training) and certified staff.
- Staff with strong interpersonal and communication skills.
- Caseloads are not burdensome.
- Appropriate supervision mechanism in place.

Social Worker weekly agenda
(n hours)



■ Interviews & home visits ■ Networking
■ Self caring-preventive BOS ■ Admin work

5. Information system

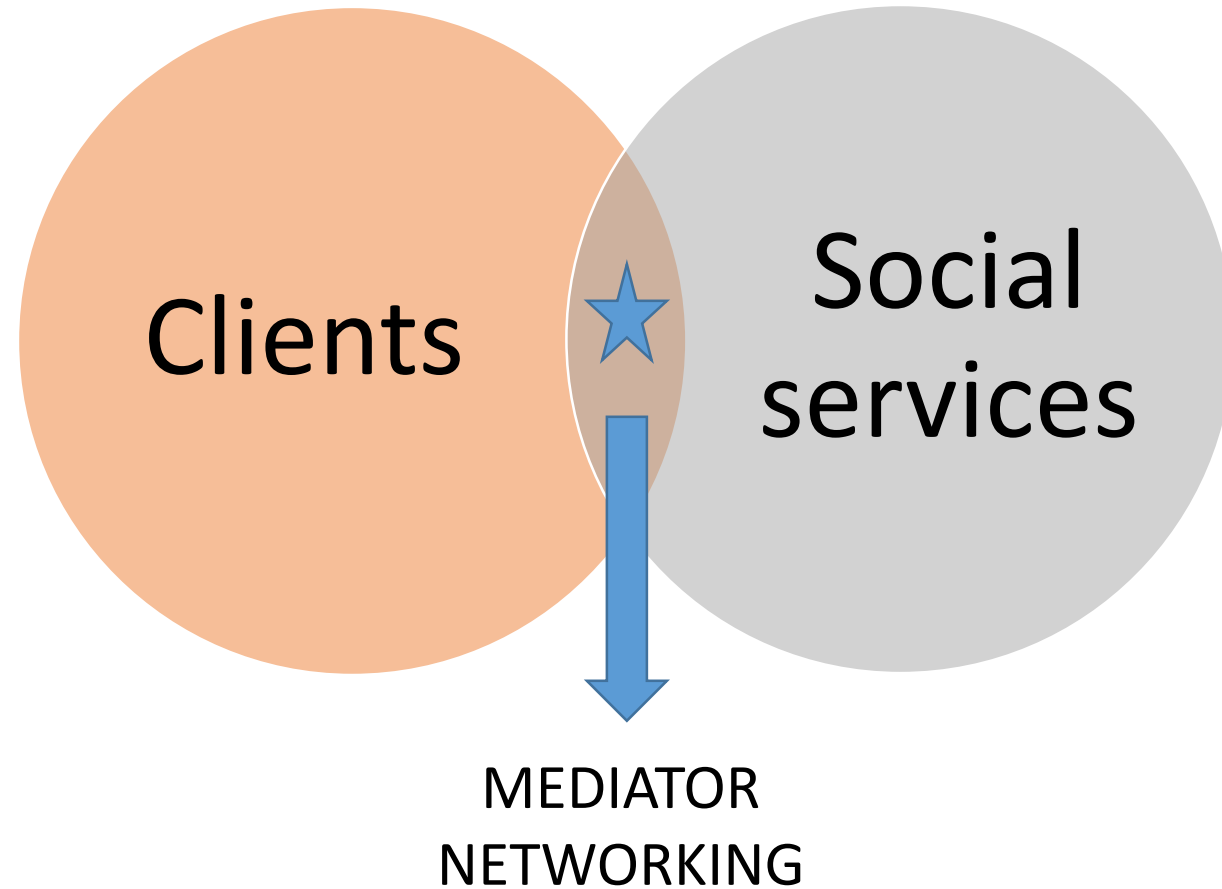
- Well-designed MIS in place to support all processes
- Trained staff to manage the system
- Sufficient resources to finance its regular maintenance and troubleshooting
- Interoperability among related information systems



Social Intermediation (services)

Main function of Case Management

Networking as a key to bring clients closer to social services

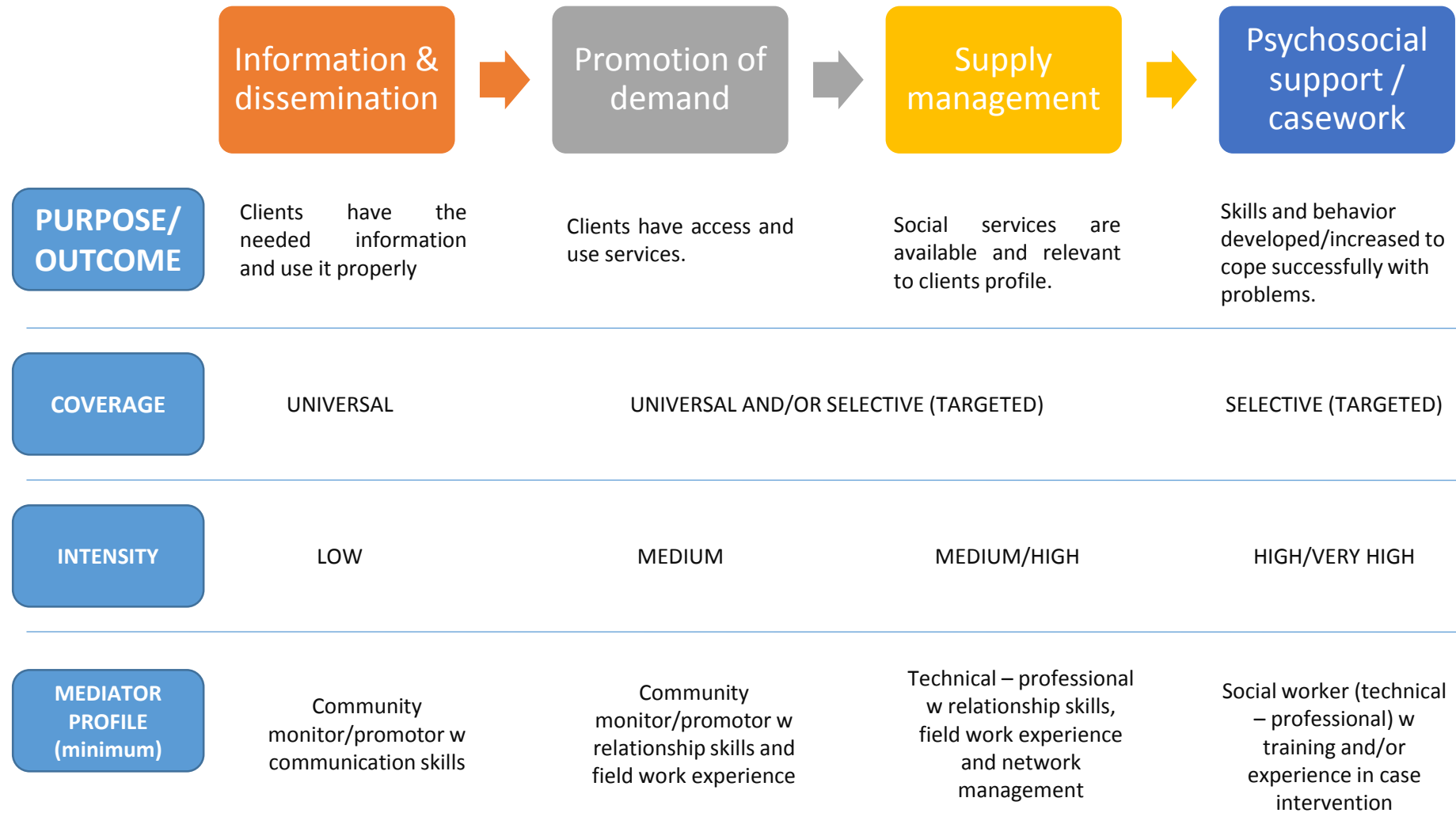


Importance of the mediator

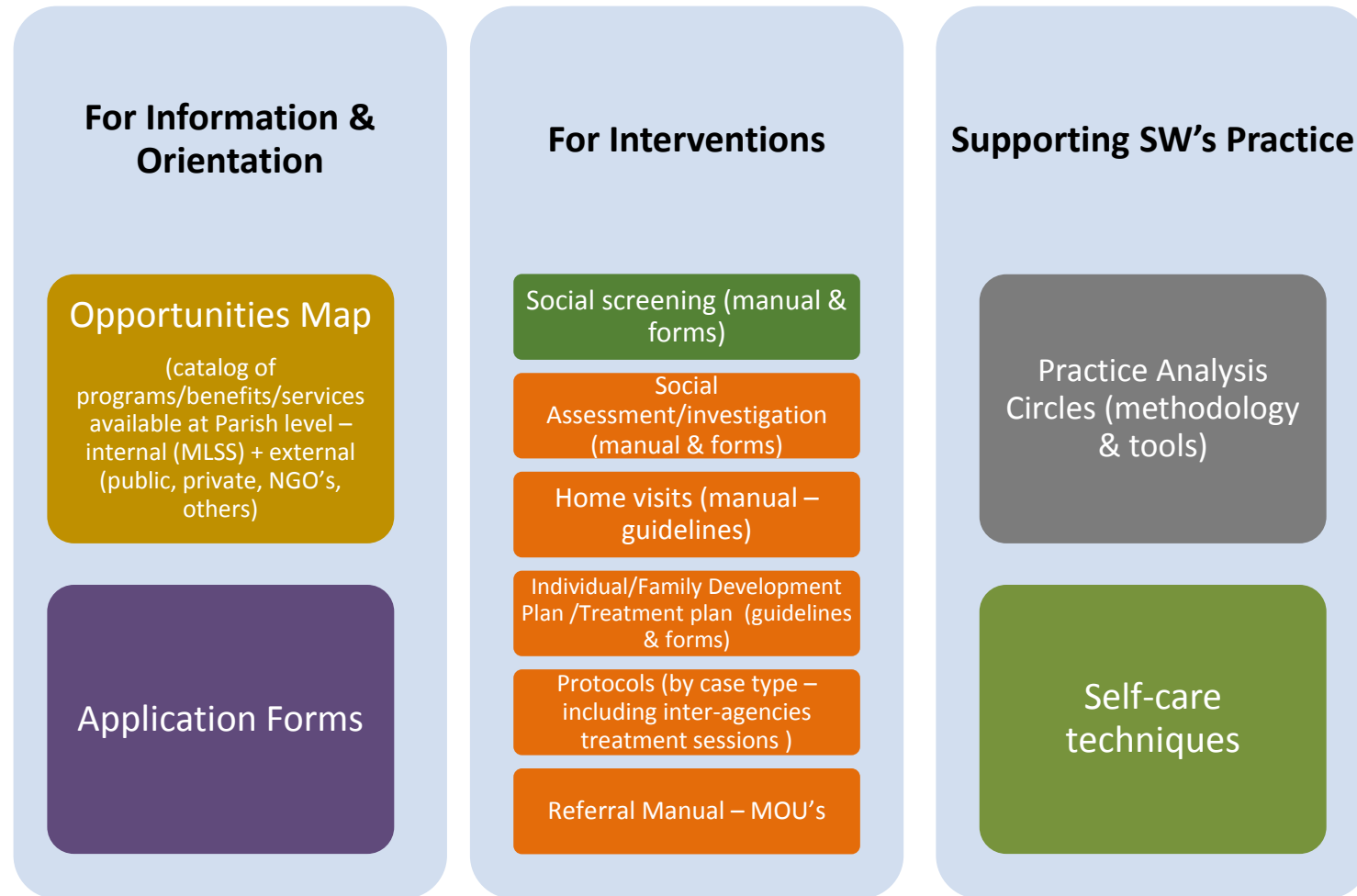
Client	Services
<ul style="list-style-type: none">• Motivations• Interest• Skills• Coping strategies• Priorities• Drivers• Main problems	<ul style="list-style-type: none">• Requirements• Timeline• Specific services (that are provided)• Location• Availability• Contacts

Needs to know details about the client and the available services (most important = **how they work**)

Types and levels of mediation



Social Workers need a Toolkit

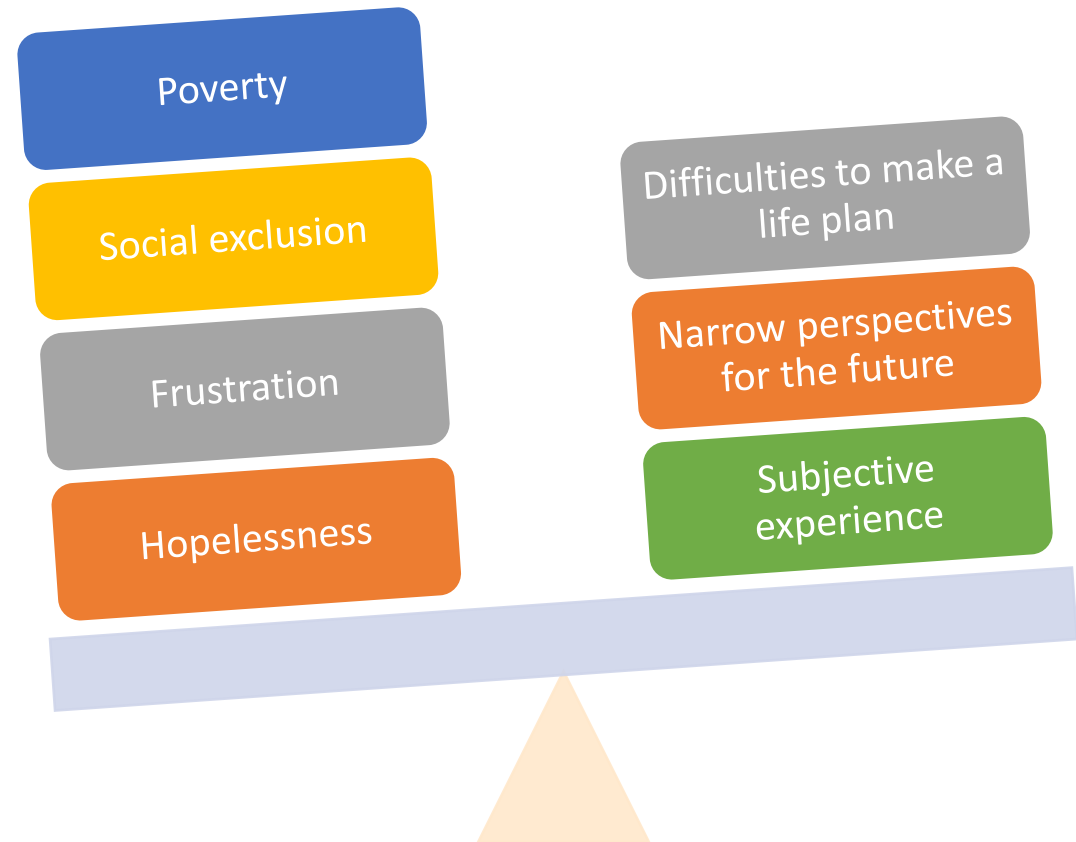


To take into account ...

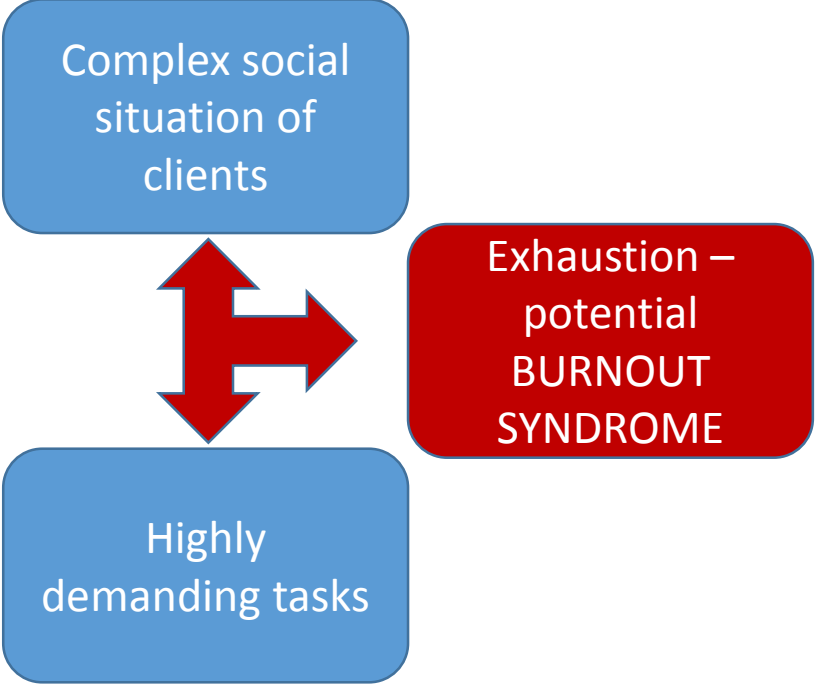


Clients daily cope with ...

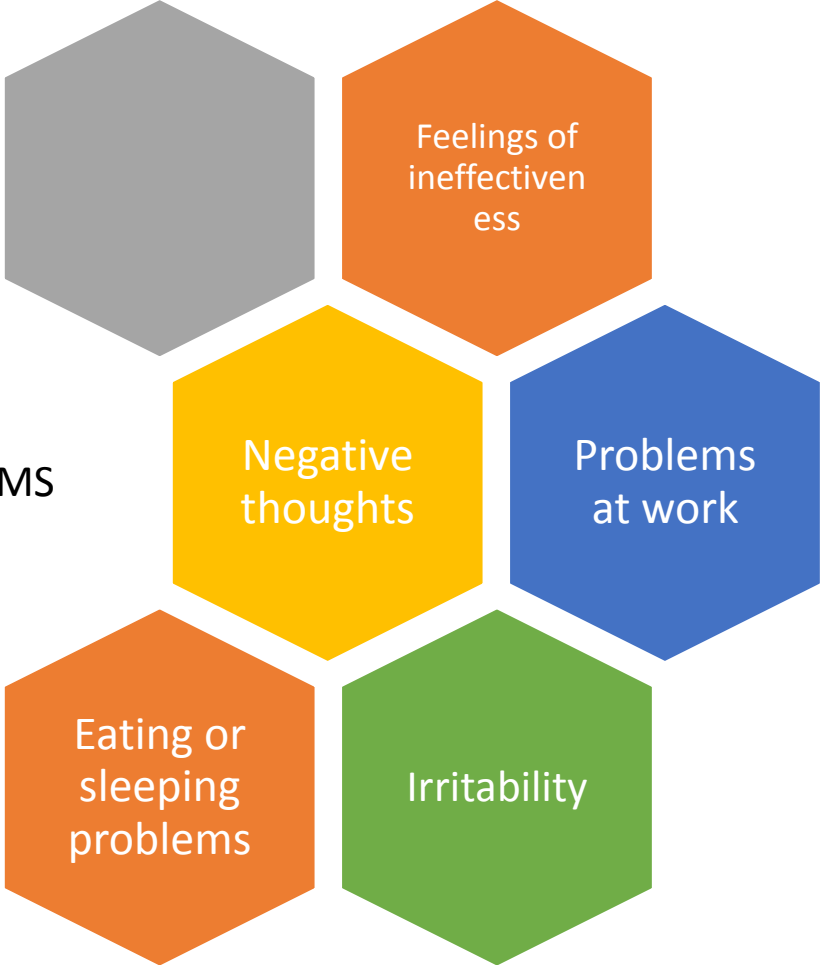
Conflicting ways of interaction
Chronic stress



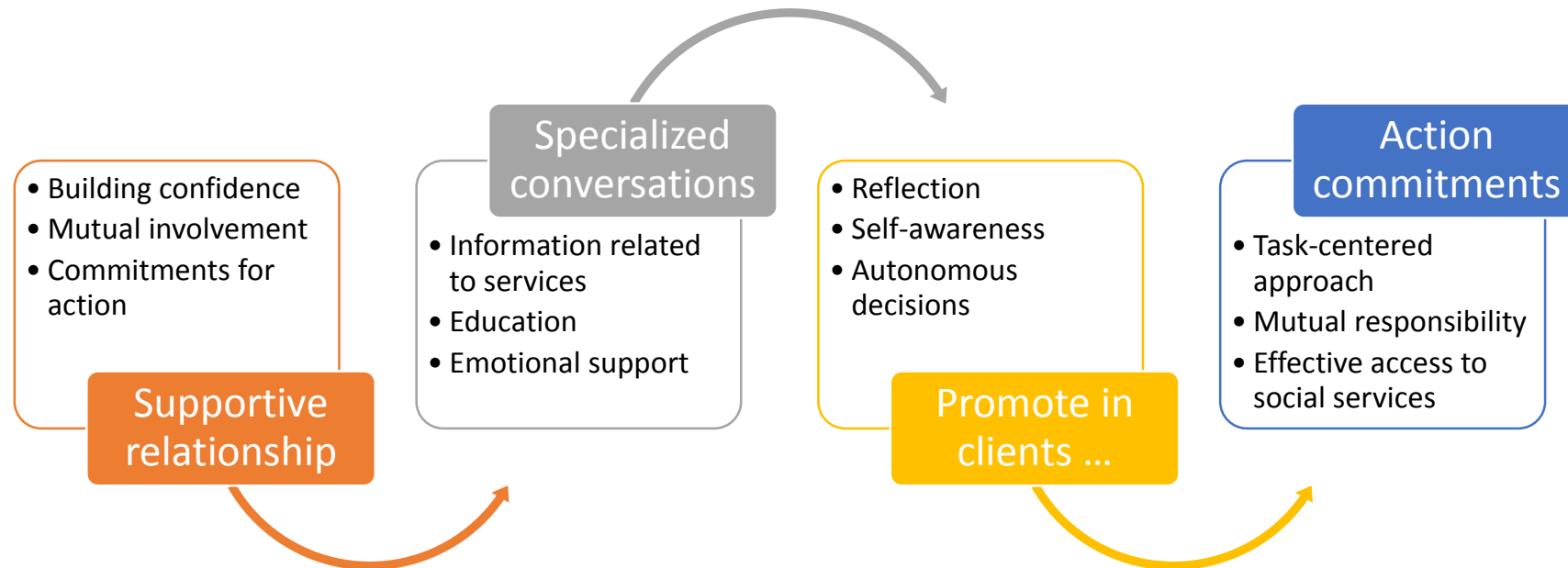
Social Workers daily cope with ...



SYMPTOMS



Intermediation services are a support process ...



Lessons for policy design

Social intermediation programs based on case management

Social Intermediation programs ..

- ✓ Are effective tools for reaching the extreme and chronic poor.
- ✓ Have to be tailored to local capacity and conditions.
- ✓ Should be integrated within existing institutions and programs.
- ✓ Do not forget to fuel the supply side.
- ✓ Keep the focus on agreed results.
- ✓ Set realistic expectations about impacts.
- ✓ Implement all aspects with rigor.

Time for discussion

