

Assessing Your Case Management Improvements

Successful case management has many components and can mean many different things to various programs. In order to get the best results from your case management system, you must first hone in on what your staff and programs most need to improve. What are your specific case management needs?

- Eligibility determination and data validation** to meet Federal and/or State guidelines
- Case notes and documentation** of services to tell the customer's story and share information
- Integrated staff and team responsibilities** to best utilize your limited resources
- Continuous customer engagement and service promotion** to ensure customers stay actively involved in service delivery
- Caseload management strategies** to better organize Career Center services to handle the increased traffic
- Interpersonal skills** to motivate customers to achieve greatest career success
- Skill assessment and career consultation** to steer customers toward the jobs that are right for them

Shifts in Case Management

FROM

TO

My customer.	→	Our customer.
Staff-driven process.	→	Customer-driven process.
Meets program's goals.	→	Meets customers' needs/goals .
Pre-employment activity to document service intervention.	→	Pre- and post-employment activities to build skills and achieve self-sufficiency.
Finite length of service based on type of activity (e.g., basic skills training).	→	Length of intervention not defined - customized based on skills and on-going outcomes.
Set, specific services for all without customization (same services with one delivery methodology).	→	Customized activities designed around customer's need and delivery choice.
Job placement defined as successful outcome	→	Attachment to labor force and advancement within labor force define success
Management of linear services offered one at a time .	→	Coordination of multiple services delivered simultaneously .
Program activities are distinct for customers.	→	Seamless service delivery of multiple program activities .
Limited understanding of partners' services.	→	Working understanding of all system services.
Limited coordination and sharing of data (e.g., case notes).	→	Standardized, common case notes shared by partners.
Program service staff who refer to other programs.	→	System service staff coordinates the delivery of multiple programs.
Focus on job seeker customer .	→	Focus on job seeker, business and community customers .

Purposes of Case Management

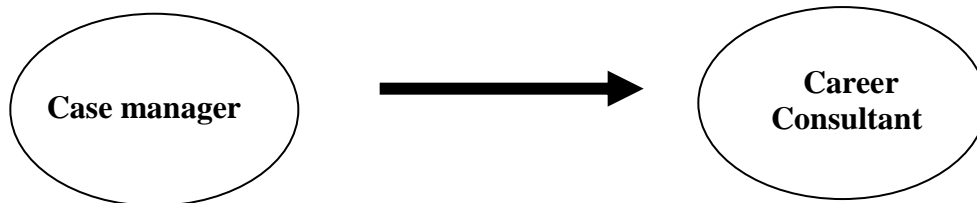
Case management is a **customer-centered, goal-oriented process** with five distinct purposes:

- 1. Assessment** of a job seeker's skills, interests, and needs.
- 2. Career consultation and guidance** based on labor market needs and trends.
- 3.** Identification of a **comprehensive menu of appropriate services.**
- 4.** Promotion of services to encourage **continuous customer engagement.**
- 5. Coordination and documentation of services** across program boundaries.

Case Management:

- Is defined and customized by customer's career goals
- Evolves over time based on customer's level of job readiness
- Requires documentation of service needs, interventions, and outcomes

The New Paradigm...



Career consultants provide concierge services!

Career Consultant/Concierge Responsibilities

1. **Engage customers in conversation** (and build a relationship) to determine what they want and need.
2. **Ask a series of probing questions** to determine interests and skills.
3. **Use, understand, and evaluate** a wide variety of comprehensive assessment tools.
4. **Understand and assess all of the community resources** that a customer might use.
5. **Know the “rules” for using each of the community resources** to make the right recommendations.
6. **Build relationships with community partners** to pull strings and get customers access to all appropriate services.
7. **Help customers cut through red tape and other barriers** to get appropriate services in a compressed timeframe.
8. **Offer additional services that the customer may not know about** to ensure higher satisfaction and greater success.
9. **Gather feedback to enhance your future service delivery** (e.g., the value of training providers’ services) and develop a process to **continually improve service delivery**.
10. **Anticipate future needs of the customer and offer services as just-in-time options** and continually design new services to meet emerging/changing needs.
11. **Grow the marketplace** by understanding local businesses need for workers and skill sets today and in the future.