Case Management Fundamentals Workshop

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Presented by Matt Eldridge - Director

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Controlled Chaos
Management Solutions, Training, Tech Innovation & Coaching

nesa20
national employment services association

nesa.com.au

Who Am I?

In Brief
- Over 12 years working on performance improvement projects for over 40 Australian Employment Services & Training providers.
- Highly experienced in coaching/training staff and managers (including delivery of many training topics for NESA.)
- Experience in developing key BA reports to support and reward positive performance improvement messages.
- Over 30 training programs designed to assist in key industry leading messages related to performance, quality servicing and contract compliance.

- Previous Roles Include:
  - National Learning and Development
  - Management of performance improvement
  - Management high-low performing sites
  - Performance Manager
  - Over 10 years project/event management experience

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Topic 1

Is there a role for case management in modern employment focused service delivery?

Traditional Case Management provides

Frontline
- Discuss experiences with another person (comfort)
- Emotional intelligence in decision making for individuals
- Relationship building and empathy
- Motivation and encouraging participants
- Diverse problem solving

Organisation
- Communication with change management
- Personal mentoring of staff (flow on effect to Participants)
- Career path options to encourage staff.
- Providers individual values and differences in service delivery.
- Provide specific options for specific cohorts

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Technology provides

Frontline
- Efficient servicing alerts.
- Efficient reporting of Participant progress.
- Flexibility of service mediums (particularly regional servicing)
- Building participant skills for modern world through servicing.
- Passive supports and alerts, can be less intrusive.
- Location reporting of activity reporting (Participant push)

Organisation
- Ability to push opportunities to participants centrally and more efficiently.
- Ability to report Participant progress more efficiently and adapt.
- Links to fees providers are entitled through service/outcomes.
- Storage of documents (cost advantage)
- Privacy advantage, locked in system.
- Ability to monitor specific caseload/cohort success activity.
- Less need for heavy overheads, facilities, support staff etc.

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Transition Required?

Frontline
- Many staff are currently challenged by new technology.
- Staff perception of "case management" being mainly face to face focus.
- Staff ability to be truly a facilitator of a plan through different engagement tools.
- Staff will need to be more independent workers, not office or desk bound.

Organisation
- Perception of change meeting Organisational values.
- Confidence in systems, (clouds can cause concerns)
- Ability to restructure costs from staff to technology development and maintenance.
- Confidence in managing staff through activity and results rather than visual observations.
- Current and future IWRAP compliance requirement.
- The right balance between MyGov and Organisational web services

← old way
new way ⇒

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Topic 2

Can efficiency be applied to the 5 case management activities:
- *Assessment*
- *Planning,*
- *Linking*
- *Monitoring*
- *and advocacy?*

6 Key contract steps

Engagement
- Appointment attended
- Demonstrate we will get them employment results
- Engaged in service delivery

Assessment
WHO WHAT HOW WHERE WHY WHEN
- Ongoing assessment through activities
- Labour market testing

Strategy/JP
GOAL PLAN STRATEGY
- Job Plan strategy go reduce barriers to employment
- Lots of activity to change routine ready for employment
- Move participant out of comfort zone
- Certificate and licences to skill for employment

Referrals
- Keep participants moving at all times
- Numbers game more opportunity more reward
- Prepare for work
- Address issues to employment

I LOVE REFERRALS

Placement
- Successful ACTION PLAN & marketing provides participant successful employment
- Correct anchor information

START NEW JOB!!

Outcome
- Effective relationship
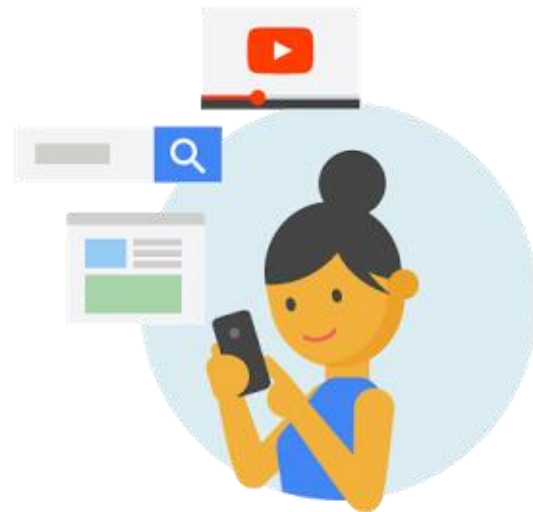- Strong PPS
- Evidence collection
- Claim as full

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Efficiency in managing activities

- Pushing activities enrolments and calendars to an app.
- Tracking hours and sign off e.g. WfD supervisor app.
- Using geo-location to reporting time/place in and out to consultant.
- Alert consultant of non attendance/compliance.
- Conduct OHS and other training and assessments online.
- Provide evidence the activities are linking to the JP.
- Build service journey through Participant web service.
- Ability to track more diverse life style activities e.g. practicing a bus route.

Efficiency in assessment

- We already use Participant data ESCN to assess caseloads.
- Participant tracking could add to range of information and therefore detailed caseload assessments.
- Self assessment potential could tools be added to participant web access.
- Passive support in placement, e.g. morning app push.
- Stronger ability to assess employer needs for job match.

Efficiency in planning (JP)

- Linking activities into a web page/app.
- Tracking of activities, attendance and results.
- Facilitating Participant to engage in planning and provide more input their service progress.
- More mobile staff environment, linking via video or phone to review.
- Less office bound for some staff assisting a more creative approach.
- Two way feedback eg, chat help with consultants.
- Build in records of service/compliance.

1. plan

2. do

3. check

4. act

Efficiency in linking/referring

- Ability to link to different services/activities electronically adding efficiencies for Participants and staff.
- Learning environment created for Participants to access.
- Resume's are now more online, e.g. LinkedIn type environments.
- Tracking referrals, income and value for money.
- Participant can have a virtual tour of the service prior to commencement.

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Efficiency in monitoring

- Monitoring staff activity and results.
- Monitoring staff safety e.g. outreach work
- Geographic location reporting (Participant information push)
- Labor market planning advantages.
- Organisation can use data collected to be more innovative in planning.
- Many Participants are less defensive if not coming into office.
- "Passive" Post Placement Support and evidence collection.

Efficiency in advocacy

- Employer and Participant contact points
- Flexible learning
- Technology to support advocacy outside consultant contact
- Flexibility around language and disabilities
- Ability to program routine with reminders
- Online mentoring could be less intrusive within workplace
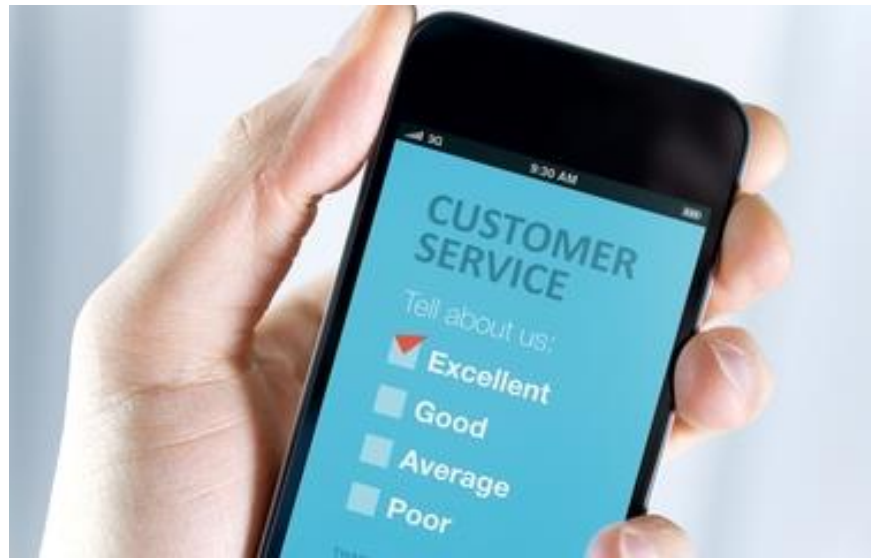- Potential links between DHS and providers (wrap around service)

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It starts with us!

- Providers need to continue to adopt change in service management from top down.
- Transition to operating a more flexible case management model, staff focus on jobs technology to support.
- If it's not part of our everyday life how to we move Participants to the work in changing workplace.
- The right tools. Not technology that doesn't adapt to our roles.
- Understand what we want our people to do well, and what we want technology to support.
- People like technology, if engaged effectively. First impressions count!
- Live what you implement, from operational management to frontline.