Handout 1: Conduct Case Management Meetings

Developing case management meeting guidelines
In too many instances, clients are shuttled among many community service agencies, with little or no coordination. Other clients have many needs that go unmet because no person or team takes responsibility to assess needs and find the necessary services. At the CPCC when a number of other services are involved, there is negotiation over which service will take the lead role in coordination. In complex cases it may be useful to hold a case management meeting. The client must have agreed to share their information with other services before a case management meeting can be arranged.

A case management meeting can be useful for
- Information gathering to assist assessment and planning
- Interagency planning and coordination, review and monitoring of the plan.

One service should be selected to be the case manager; this service will chair the case management meeting and be responsible for the coordination of services to the client. The service responsible for case management will usually be the service, which has most contact with the client. As part of their coordination responsibilities this service takes on responsibility for calling case management meetings and chairing the meetings. In the case of unaccompanied young people in the CPCC, the service with statutory responsibility for the young person would be responsible for case management meetings.


Role of the case management Chairperson
Information sharing with the client is facilitated by establishing an appropriate rapport with the client and implementing appropriate procedures including:
- Establishing the purpose, objectives and agenda of the meeting
- Facilitating participation of all members
- If necessary to assist the client to put forward their views
- Resolving conflict where relevant
- Summarising the agreed outcomes
- Checking with everyone that they agree with the outcome and understand what their role is
- Making sure that the plan is written down
- Arranging further meetings as required
- Follow-up with participants to make sure they undertake the tasks they have agreed to.
Managing conflict

Even within a professional environment, conflict sometimes arises. The case manager can support others by recognising that conflict is an inevitable part of the process and participating in its resolution. Conflicts often arise about:

- Disagreement about data or facts. One of the best ways to resolve such conflicts is to gather more data from sources that conflicting parties agree are credible. This can happen before or during a case management meeting.
- How something is to be accomplished. Professionals often have differing standards, ways of providing services, and problem-solving approaches. One way of resolving conflicts about methods is to discuss what criteria should apply to the particular situation.
- The outcomes of the process. Professionals may have different perspectives on priorities, commitment to short-term or long-term care, the empowerment of clients, and the involvement of families. The case manager can help the team establish common ground on which to carry out the goal-setting activities.
- Values. Beliefs and personal philosophies differ. Conflicts of this nature are often deeply felt. To solve them all parties must be committed to understanding each other’s point of view. They must show respect for others’ beliefs and find a common goal. In particular, the case manager must deal with thorny conflicts among professionals who feel that they represent the values of their particular disciplines.
- Participation and intervention by the client. Clients often believe professionals who think they “know best what is right for the client” are manipulating them.
- Conflict within oneself. The case manager and/or other professionals involved in the case management meeting may experience intrapersonal conflict while having to implement mandatory decisions they do not agree with. For example there are conflicting feelings associated with the negative fact that a child who has been abused by parents is returning home and the positive fact that the parents have since participated in counselling.

Appropriate conflict resolution techniques

There are effective and ineffective ways to manage conflict. Experts agree that the most effective conflict management incorporates a win-win strategy for all parties involved. (Truitt 1991) Guidelines for using a win-win approach:

- First begin to think and talk about the problem in terms of the needs of the conflicting parties. Many conflicts arise as individuals focus on outcomes and the results they desire. Looking at needs instead of outcomes allows the participants to begin work on mutual problem solving.
- After there has been a discussion of needs, the participants commit to a mutual effort to solve not only their own problems but also those of the other participants. It is critical that all participants be actively involved in the process, not just sitting there listening to others.
- Once this much agreement has been reached, the conflict should be described in terms that are as specific as possible. Each participant can ask whatever questions and present as many facts as necessary to define the conflict clearly. In this step, individuals begin to understand that the event causing the conflict does not look the same to them as to others.

• Next begin to identify all the differences there are between the participants. In doing this, they become able to articulate the conflict from the other participants’ points of view. Mutual understanding can now take form.
• Now focus on finding solutions to the conflict. The participants brainstorm possible solutions and then evaluate each according to its potential for meeting the differing needs previously stated.
• Once an agreement is reached about how the conflict is to end, a plan is developed, with actions and responsible parties clearly stated.

The benefits of addressing conflict are numerous. Once a problem is identified and individuals are committed to working on an issue, there arises an atmosphere that promotes change.


How the case manager can facilitate the meeting with other professionals

Before the meeting
1. Do your homework. Be as familiar as possible with the issues at hand and the answers you need to have.
2. Be conscious of the impact of value systems of yourself, the client and the key stakeholders on outcomes – and respect them.
3. Be sensitive to the process of the interaction, especially the rules and practice of the specific situation in which you are involved.
4. Know your limits. Don’t expect to be all things to all people. Use consultants or other resource persons who are familiar with the problem and the situation and who can help you present your case.
5. Check the impact of statutory mandates on interventions, the client and significant others.

During the meeting
1. Identify mutual concerns and common goals of both parties. Seek to develop an alliance for the purpose of solving the problem.
2. Define the issue and stick with it. Don’t digress.
3. Listen. Keep cool, and don’t argue. (At times non communication may be the best communication).
5. Don’t bluff. Feel free to say frequently, “I don’t know” and I’ll find out”.
6. Call on the experience and skills of the other members.
7. Keep you sense of humour but direct it at yourself, not at your questioner.
9. Don’t expect to win them all. At the point of impasse, back off and seek mediation.
After the meeting
1. Remember that additional meetings probably will occur in the future. Review what happened and learn from it.
2. Do not leave unresolved issues until next time.
3. Write up a record of the meeting.

Indicators of good practice
As the provider of a variety of services the Carmen Poldis centre will often be placed in the role of coordinating access to and delivery of a range of other appropriate support services to clients. Coordination of client services and supports will be based on:

- Sound assessment, knowledge of relevant external supports and networks which will be reflected in the individual client support plan
- Knowledge and understanding of external agencies to which clients may be referred
- Coordination of its own services and cooperation with external agencies
- Giving clear information to clients about access to external agencies and the service that will be offered
- The development of links and protocols with external agencies including an understanding of confidentiality boundaries
- The plan for the coordination of services is explored, developed and negotiated together by the client and all other services
- The plan for the coordinated services being clearly explained to the client.