



Best Practices in Case Management

Across their life span, children and adults with intellectual and developmental disabilities (I/DD) and their caregivers interact with many providers depending on their age, their needs, and the service delivery systems that support them. Case management professionals have diverse titles and job functions, yet no universal set of responsibilities defines their role or requisite job competencies across all service systems which can impact the quality and consistency of support services received.

Mathematica partnered with the Florida Developmental Disabilities Council (FDDC) to define the core competencies for case management professionals supporting people with I/DD. Mathematica is also piloting a competency tool for case managers to increase the consistency of services provided in a variety of service systems, including Early Steps, vocational rehabilitation, and home- and community-based services (HCBS).

About the competency toolkit

The toolkit consists of two reference files: (1) the case management competency list and the competency matrix and (2) four user-facing tools (Figure 1). The user-facing tools are designed to gather information on case manager performance from four perspectives, including people who receive services, their caregivers, case managers, and supervisors.

Figure 1. Components of the case management competency toolkit

1 Case Management Competency List Explains six core competencies and behaviors a program participant can expect from a case management professional.	
2 Competency Matrix Gives concrete examples of case manager behaviors and participant/caregiver experiences at three competency levels: <ol style="list-style-type: none"> 1. Does not meet the competency standard; 2. Meets the competency standard; and 3. Exceeds the competency standard. 	
3 Participant Feedback Tool Designed for people with I/DD to share feedback on a case management professional using Easy Read and plain language statements.	5 Case Manager Self-Reflection Tool Allows case management professionals to reflect on their job performance relative to the knowledge, skills, and attitudes of the core competency standards.
4 Caregiver Feedback Tool Designed for family members and caregivers to share feedback about a loved one's case management experience.	6 Supervisor Reflection Tool Allows supervisors of case managers to contribute insights and assess their supervisee's performance relative to the competency standards.

Improving the lives of people with I/DD

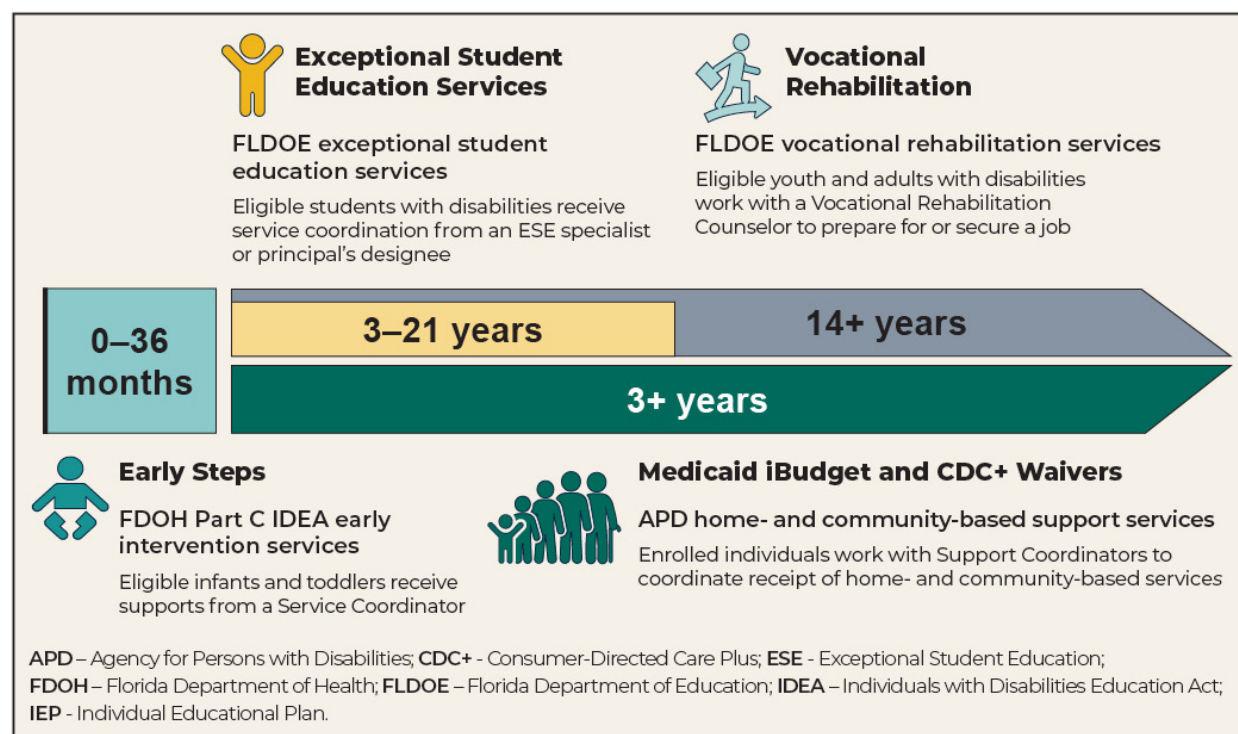
This toolkit is designed to create consistent expectations for case management professionals and improve the quality of services provided to people with I/DD. The core competency list and matrix identify best practices by defining the key skills, knowledge, attitudes, and behaviors of competent case management professionals. The user-facing tools provide an opportunity to elicit feedback from supervisors, caregivers, participants, and the case managers themselves on case managers' performance.

The feedback will offer insight into case managers' strengths and help them pinpoint opportunities for professional development.

About the Florida disability services systems

Floridians with I/DD and their caregivers navigate several disability systems to access needed services and supports (Figure 2).

Figure 2. Florida service delivery systems across the life span



Providers supporting people with I/DD can include waiver support coordinators, residential support providers, and VR counselors, among others. The goals of this project are (1) to define shared competencies for case management professionals and (2) to develop and pilot test a tool to assess the competency of these professionals. These goals aim to increase the uniformity and quality of services provided to people with I/DD and their caregivers.

This project is provided by the Florida Developmental Disabilities Council, Inc., supported in part by grant numbers 2101FLSCDD and 2201FLSCDD from the U.S. Administration for Community Living (ACL), Department of Health and Human Services (HHS), Washington, D.C. 20201 funded by ACL/HHS. Grantees undertaking projects with government sponsorship are encouraged to express freely their findings and conclusions. Points of view or opinions do not, therefore, necessarily represent official ACL policy and do not necessarily represent the official views of, nor an endorsement, by ACL/HHS or the U.S. Government.

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