Case Management in SSN Programs and Social Services

Social Protection & Labor Global Practice

December 9th, 2014

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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.

It is characterized by advocacy, communication, and resource management and promotes quality and cost-effective interventions and outcomes.

CLIENT – ORIENTED
OUTCOME - DRIVEN

Case Management?

At the Systems level

- Case Management as a strategy for coordinating the provision of services to client within that System.

At the Client level

- Case Management as a client-centered, goal-oriented process for assessing the need of an individual for particular services and obtaining those services.

Case Management seeks to make service delivery …

- ✓ Integrated
- ✓ Coordinated
- ✓ Accountable
- ✓ Sequenced
- ✓ Sustained

- ✓ Client-oriented
- ✓ Goal-oriented
- ✓ Flexible
- ✓ Cost-effective
- ✓ Comprehensive

Networking and Mediation: key roles/functions

Clients

Social services
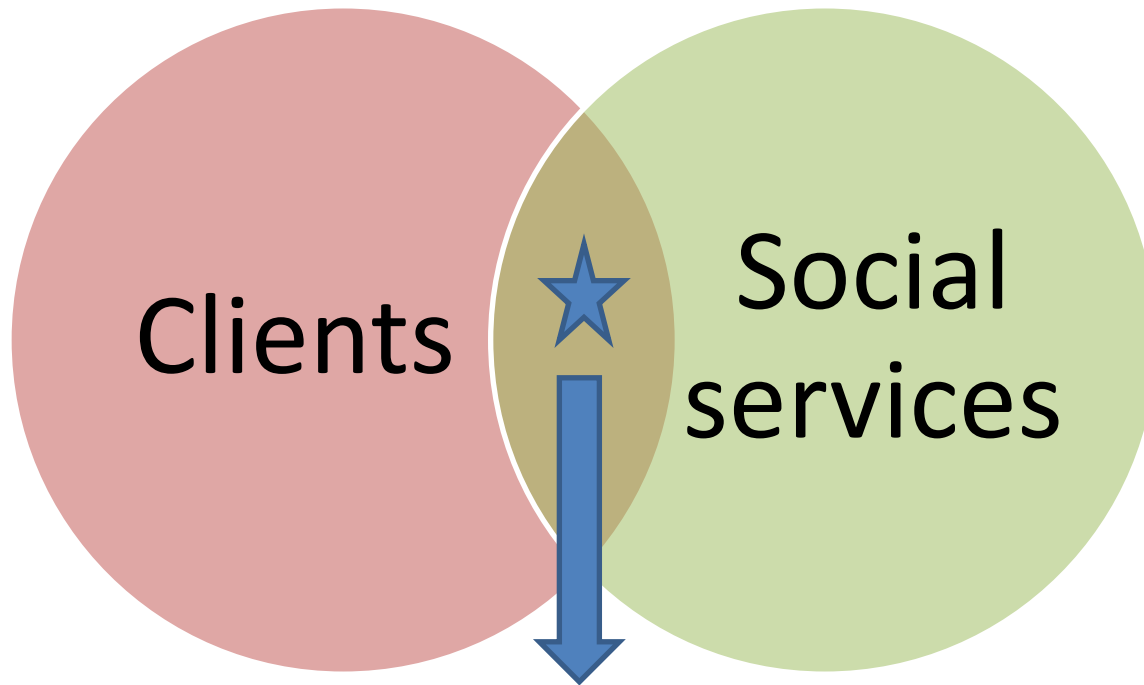
✓ MEDIATOR
✓ NETWORKER
✓ LINKING CLIENTS TO
   SERVICES
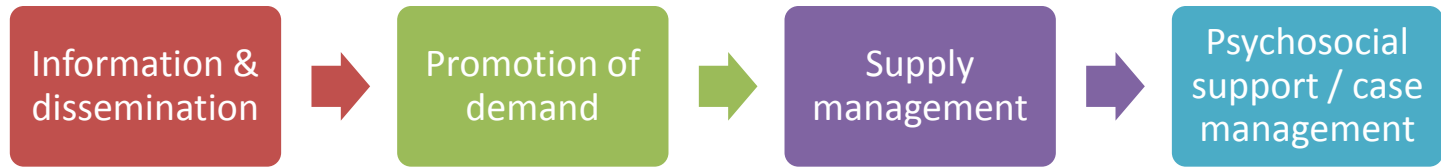
Key aspects of **networking**: demand and supply

- Targeted work at intersections
- Need to know in detail both sides
- Is a specialization (it is done by specialists)
- Results-oriented
- Networking has specific **tools**

Opportunity Map

Protocols

Agreements (MOU's)

Information Systems

Evaluation of clients satisfaction
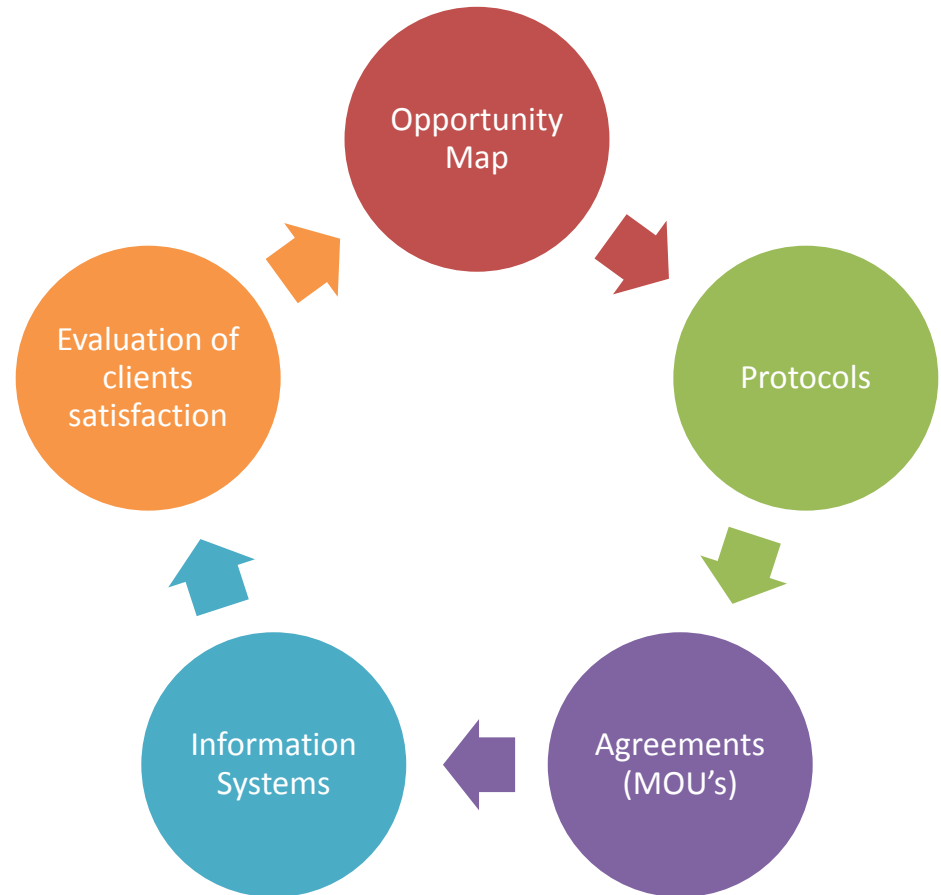
Importance of the **mediator**

Client	Services
• Motivations • Interest • Skills • Coping strategies • Priorities • Drivers • Main problems	• 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**)

	Information & dissemination	Promotion of demand	Supply management	Psychosocial support / case management
PURPOSE	Clients have the needed information and use it properly	Clients have access and use services.	Social services are available and relevant to clients profile.	Skills and behavior developed/increased to cope successfully with problems.
COVERAGE	UNIVERSAL	UNIVERSAL AND/OR SELECTIVE (TARGETED)		SELECTIVE (TARGETED)
INTENSITY	LOW	MEDIUM	MEDIUM/HIGH	HIGH/VERYHIGH
MEDIATOR PROFILE (minimum)	Community monitor/promotor w communication skills	Community monitor/promotor w relationship skills and field work experience	Technical – professional w relationship skills, field work experience and network management	Social worker (technical – professional) w training and/or experience in case intervention

Types and levels of mediation

A **mediation model** needs to be selected taking into account:

1. Purpose
2. Expected Results (concrete and feasible ones) in a given time
3. Available resources (specially human resources)
4. Psychosocial environment (including local culture)

Social Workers need a Toolkit

For Information & Orientation

Opportunities Map

(catalog of programs/benefits/services available at Parish level – internal (MLSS) + external (public, private, NGO's, others)

Application Forms

For Interventions

Social screening (manual & forms)

Social Assessment/investigation (manual & forms)

Home visits (manual – guidelines)

Individual/Family Development Plan /Treatment plan (guidelines & forms)

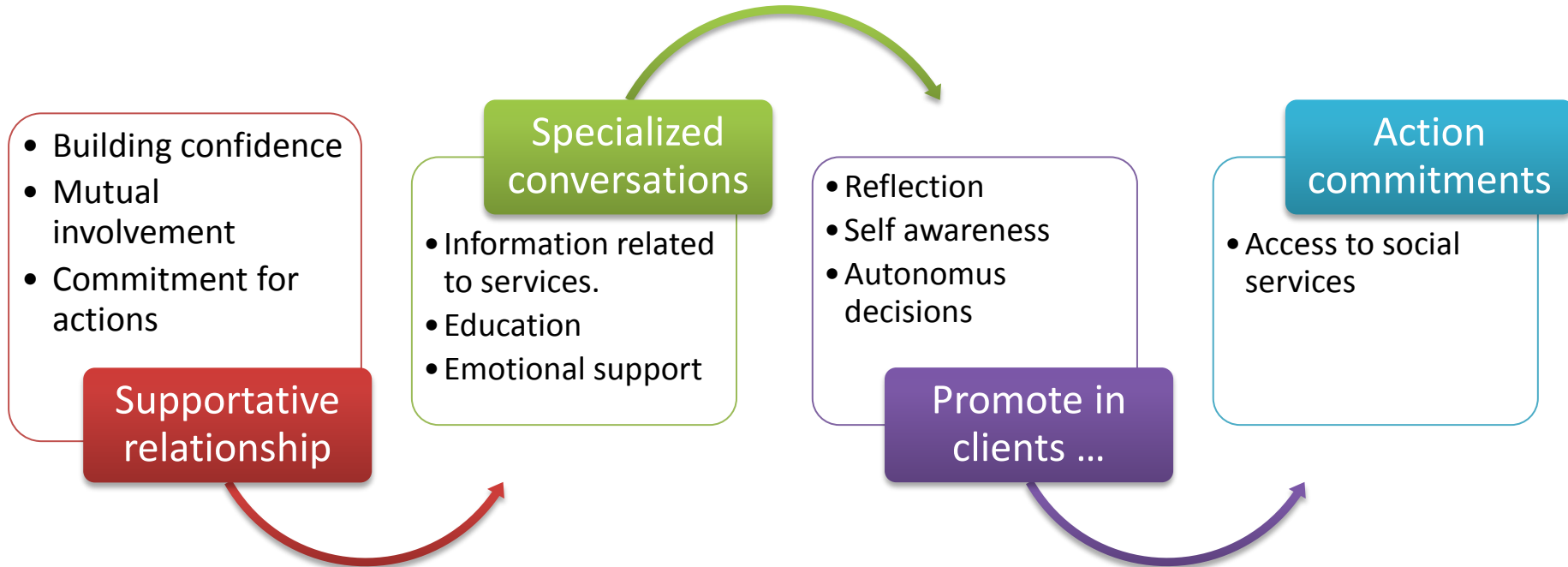Protocols (by case type – including inter-agencies treatment sessions)

Referral Manual – MOU's

Supporting SW's Practice

Practice Analysis Circles (methodology & tools)

Self-care techniques

Prepared with/for MLSS of Jamaica

Psychosocial support process

- Building confidence
- Mutual involvement
- Commitment for actions

Supportative relationship

Specialized conversations

- Information related to services.
- Education
- Emotional support

- Reflection
- Self awareness
- Autonomus decisions

Promote in clients …

Action commitments

- Access to social services

Clients daily cope with …

Conflicting ways of social interaction

Poverty	Subjective experience
Social Exclusion	Narrow perspectives for the future
Frustration	Difficulties to make a life plan
Hopelessness	

Complex social situation of clients

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Highly demanding tasks for SW'

↓

EXHAUSTION – BURN OUT

SYMPTOMS

FEELINGS OF UNEFFECTIVE - NESS

NEGATIVE THOUGHTS

IRRITABILITY

PROBLEMS AT WORK

EATING OR SLEEPING PROBLEMS
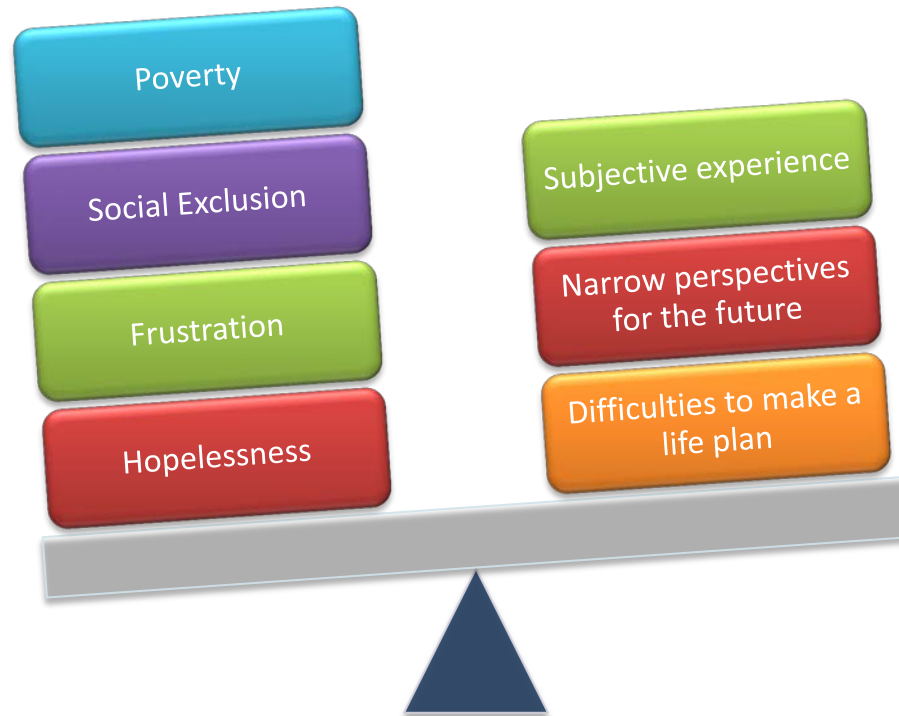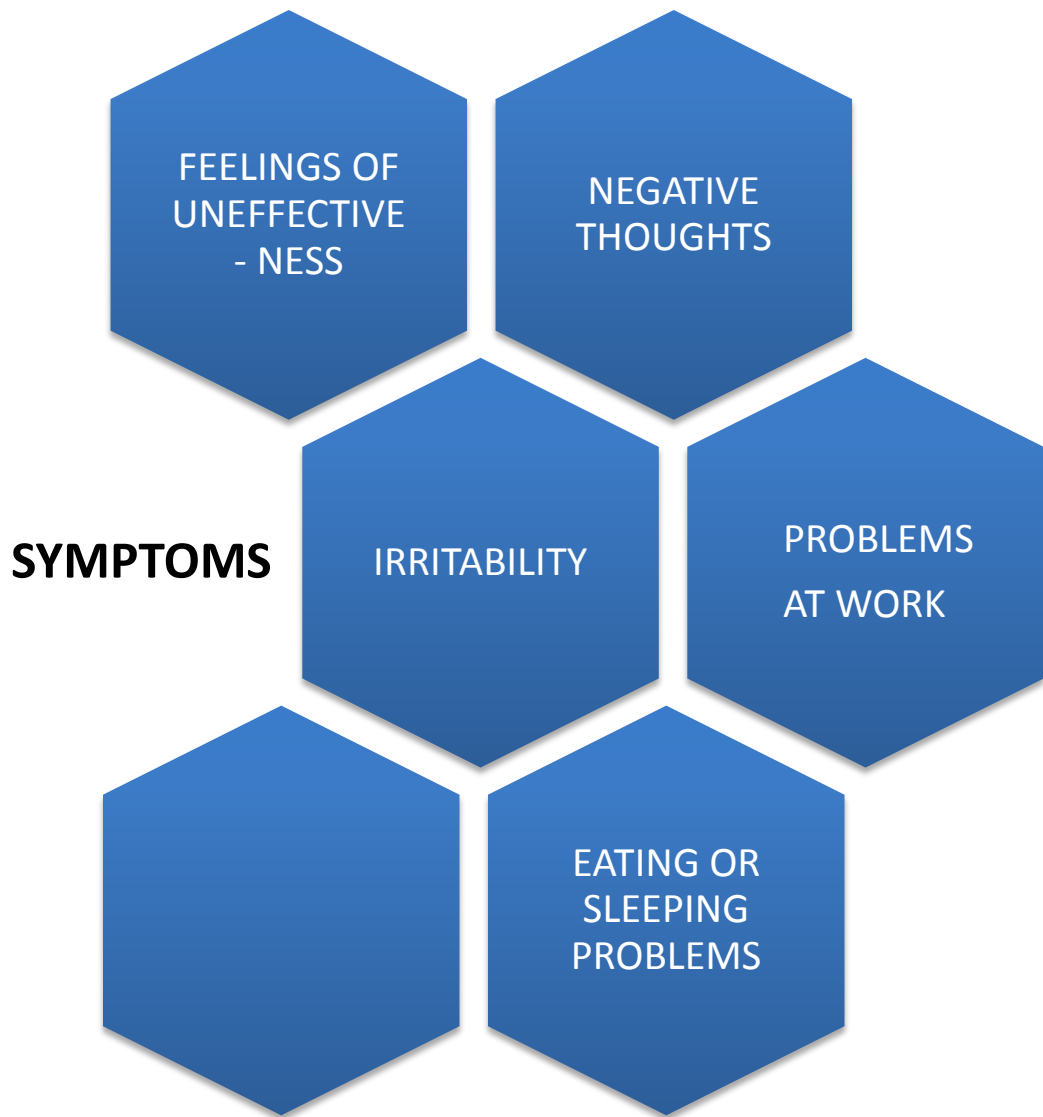
Main SW skills for a healthy and effective practice

1. **REFLEXIVITY:**
   - Analyse his/her own practice,
   - Finding new and better ways to do it

2. **COMMITMENT CAPACITY:**
   - Personal engagement in supporting clients to solve their needs

3. **CONVERSATION SKILLS:**
   - Lead the clients to make appropiate in-sights and questions needed to be aware of their life situation and make decisions to change it
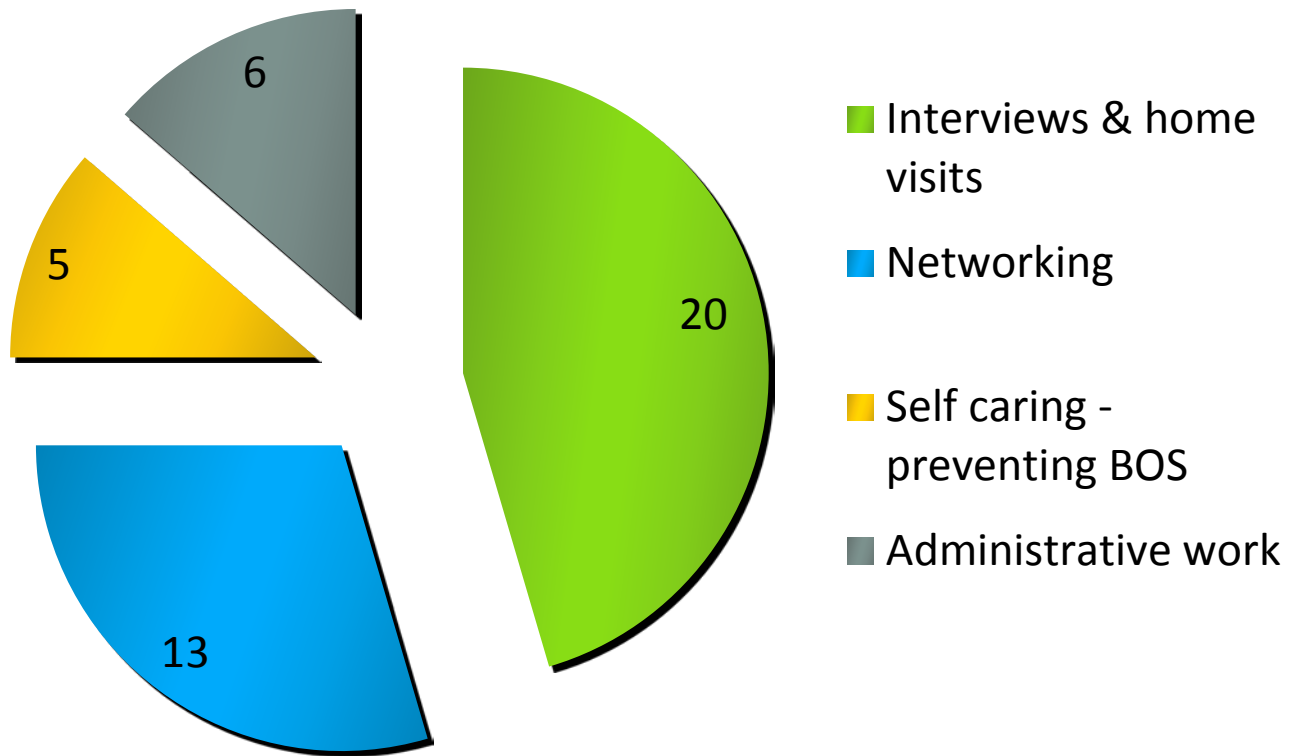
4. **BODY AWARENESS**
   - Alert on physical signs of confort and discomfort
   - Detect emotional exhaustion on time
   - Practice self care activities

Social worker weekly agenda

n hours

- Interviews & home visits — 20
- Networking — 13
- Self caring - preventing BOS — 5
- Administrative work — 6

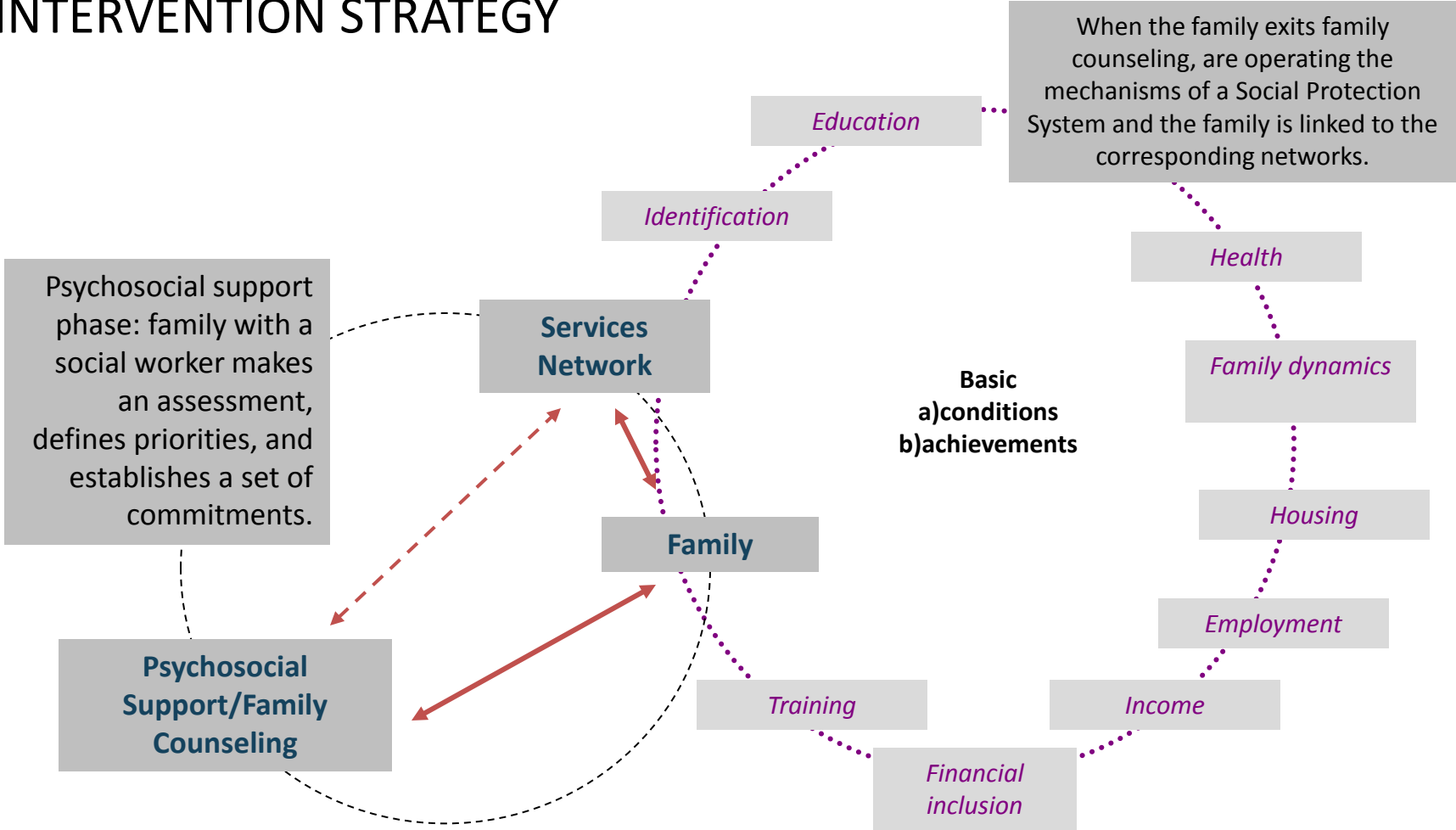# *Success Factors of Social Intermediation Programs:*

A review of *Chile Solidario* and
Red Unidos (Colombia)

The study

- *Chile Solidario* and Colombia's *Red Unidos* are programs with:
  - Similar designs; but
  - Marked implementation differences
  - Both programs have similar costs per beneficiary household (around US$ 80-130 per average beneficiary family)

- In the study, we associate differences in implementation to differences in the impacts of the two programs.

- In both programs, administrative data show an improvement in beneficiaries' wellbeing indicators.

- We do find however that implementation details affect substantially the magnitude of program's effectiveness.

INTERVENTION STRATEGY

When the family exits family counseling, are operating the mechanisms of a Social Protection System and the family is linked to the corresponding networks.

Education

Identification

Psychosocial support phase: family with a social worker makes an assessment, defines priorities, and establishes a set of commitments.

Services Network

Health

Family dynamics

Basic
a)conditions
b)achievements

Family

Housing

Employment

Psychosocial Support/Family Counseling

Training

Income

Financial inclusion

Chile Solidario – Unidos (Colombia)

Differences in implementation between the two programs

Implementation Axis	Chile Solidario	Red Unidos
Higher level institutional support; ability to propose/amend laws and decrees	✓	✗
Ex ante identification of beneficiaries' social conditions and needs, and gaps in social assistance coverage	✓	✗
Regular and periodical visits of social workers to beneficiary families	✓	✗
Intensive training and periodical evaluation of social workers' knowledge and performance	✓	✗
Integrated database management across programs and ministries	✓	✗
Ability to finance other social programs to expand/prioritize coverage towards program's beneficiaries	✓	✗
Ability to finance the expansion/prioritization of services to cover program's beneficiaries	✓	✗
Community support component	✗	✓

Chile Solidario managed similar improvements than *Red Unidos* in a shorter time span

Achievements by dimension

First cohort of beneficiaries; Chile Solidario: 2 years; Red Unidos: 5 years
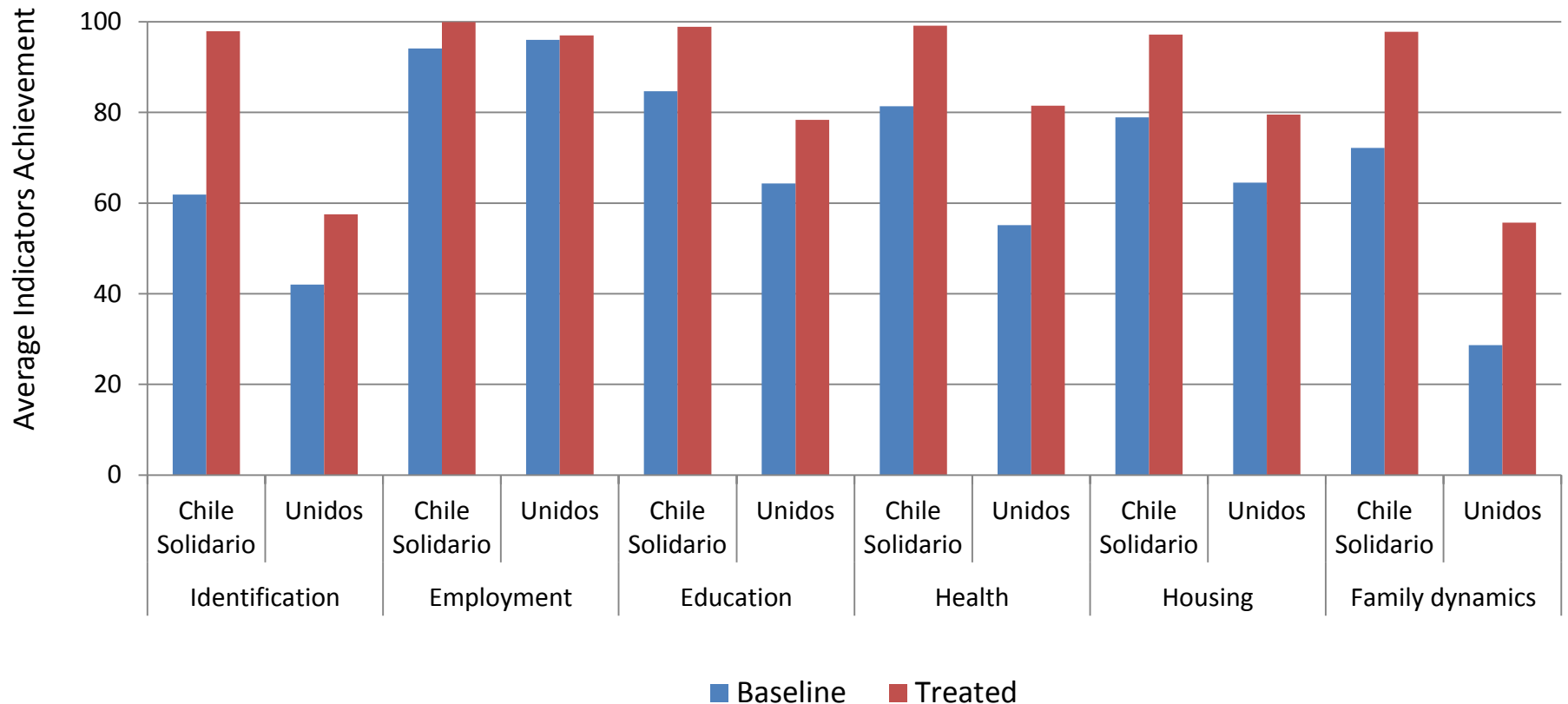
Impact evaluations confirm the greater impact of Chile Solidario

- <u>For the initial cohorts of beneficiaries</u>, the family counseling activities of *Red Unidos* had limited impact on beneficiaries' welfare indicators.

- On the other hand, impact evaluations of Chile Solidario found a positive impact on access and use of social programs; school attendance; and health care.

- On employment, impacts can only be observed when the supply and type of training programs meets the demand and needs of the most vulnerable.

Lessons for policy design

- **Social intermediation programs are effective tools for reaching the extreme and chronic poor**
  - The extreme poor exclude themselves from social life, and there is a need to go beyond the classical "passive" social assistance approach.
  - Both programs show improvements in beneficiaries' welfare indicators.
  - The design details of such programs impacts however their effectiveness.

- **Social intermediation programs have to be tailored to local capacity and conditions**
  - They do not need to be as elaborate as *Chile Solidario* to lead to positive effects.
  - Simpler social intermediation programs can also lead to positive impacts, at least along the access dimension.

Lessons for policy design

- **Social intermediation programs should be well integrated within existing institutions and programs**
  - They do not bring additional material benefits to beneficiaries; they are a "pass-through" for the distribution of social assistance benefits and social services.
  - They must be therefore well integrated within the social assistance network.
  - Beneficiaries should be granted preferential access to other programs, which may need additional resources; databases should be integrated; and new programs should be created where vulnerabilities emerge.

- **Do not forget to fuel the supply side**
  - Granting access to poor quality services may lead to little or no impacts.
  - At times the greatest increase in access can be achieved by working directly into solving supply side constraints.

Lessons for policy design

- **Focus**
  - Once a link with a poor family has been established, it is tempting to add "modules" to such programs to accomplish several objectives at once.
  - However, the more is required from families, the less likely it is that families will be able to accomplish the required objectives.

- **Set realistic expectations about impacts**
  - Social intermediation programs target the most vulnerable and marginalized population.
  - The lack of a stable and well remunerated employment may be due to deeper individual challenges, as much as to the enabling environment.
  - Setting expectations about impacts exceedingly high may give wrong impressions about the programs' performance.

Lessons for policy design

- **Implement all aspects with rigor**
  - Psychosocial support works only if families are visited regularly by trained specialists, who follow strict procedures.
  - Social workers should have some means and discretion to help families overcome potential monetary constraints.
  - Social workers should also be empowered by connecting them to community leaders.

- **(Cost) effectiveness**
  - Social intermediation programs are effective only to the extent that *other* programs effectively support beneficiaries in surmounting their constraints.
  - To the extent that the social panorama is well developed, they are very (cost) effective in tailoring social services to individual family needs.