

# Policy Case Management

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## Policy Statement

Case management is a collaborative process, that can assist clients to attain their identified goals. Key phases within the case management process that include needs and risk assessment, planning, implementation, monitoring, transitioning and evaluation. The Case Manager supports the client through the case management process with careful consideration of the client's individual, diverse and special needs, including aspirations, choices, expectations, motivations, preferences and values, and available resources, services and supports.

Strengths based practice and client participation is central to the case management process, acknowledging that all people have insight into the issues that have impacted on their ability to maintain housing and it supports our aim to reduce homelessness and housing disadvantage.

## Policy Application

This policy applies to all Beyond Housing employees and includes all permanent and casual staff, volunteers, work experience students, management, and the Chief Executive Officer (CEO). For the purposes of this document, all parties will be referred to throughout this policy as workplace participants.

## Responsibility & Authority

- The Board of Beyond Housing has responsibility for ensuring compliance with legal and regulatory requirements at a Governance level.
- This policy is operational and therefore the Chief Executive Officer (CEO) is responsible for ensuring:
  - Appropriate and effective policies and systems are in place to operationalise legal and regulatory requirements and therefore implement this policy in accordance with that responsibility.
  - All managers and workplace participants are aware of this policy.
  - Support for workplace participants to undertake their responsibilities under this policy is provided.
- The CEO may delegate specific responsibility to managers or workplace participants to ensure that the objectives relating to this policy are met.
- Managers and Team Leaders are responsible for informing workplace participants about their responsibilities under this policy.
- All workplace participants are responsible to familiarise themselves with this policy and comply with its requirements.

## Policy Detail

Case Management is described as a specialist service targeting clients in complex situations requiring intensive support (identify issues, plan for and implement solutions and strategies). Other features include:

- A focused, short-term response to situations of critical need and may include advocacy.
- Building client capacity to assist them manage their own issues.
- Client directed, to ensure the client's needs and goals are addressed wherever possible.
- Aims to strengthen a positive housing outcome, through integrated and coordinated service delivery.
- Strengths-based practice and early intervention support.
- Maintaining and strengthening the cultural, spiritual and language connections of clients e.g. assessment and case management plans include help to maintain cultural identity and connection to their preferred cultural community.

Beyond Housing has a clear vision with supporting values that underpin service delivery.

## Beyond Housing Vision Purpose Values

### *Beyond Housing will:*

- Encourage and support clients to actively contribute to the resolution of their housing issue.
- Ensure clients are fully informed of information, actions, decisions, relevant legislation and policies that may impact on their housing situation.
- Ensure clients are made aware of how to provide feedback or make a complaint about case management services either internally or via an external organisation.
- Ensure that assessments are holistic and that where specific needs are identified (e.g., wellbeing, health, mental health) referrals to appropriate services are made.
- Ensure clients are aware of the case management process, the length of service provided and any limitations of the service.
- Ensure that a person's culture, age, religion, spirituality, gender and sexual identify are considered throughout the case management process, particularly regarding assessment, goal setting and referral.
- Ensure that clients understand that they have the right to identify their goals and how to achieve them.
- Understand and support a client's choice to include a family member, support person or advocate throughout the support.
- Ensure that outcomes of case planning meetings are communicated to clients or other workers involved in service provision (with the client's consent) if a client is unable or chooses not to attend.
- Ensure that clients are provided with all options available to them when participating in case management services
- Not disclose information to any individual or organisation without the express consent of the client and only disclose or exchange information that directly relates to the client's housing issue.
- Maintain a duty of care to the client, their household and Beyond Housing staff throughout the provision of service.
- Consider any child or young person presenting with a client and ensure information provided in their presence is meaningful and age appropriate.
- Support self-determination for Aboriginal and Torres Strait Islander people accessing case management services and provide opportunities for referral to specialist Aboriginal Community Controlled Organisations.
- Ensure that clients feel culturally safe through the delivery of transparent, appropriate and inclusive case management.
- Recognise the diversity of all clients accessing case management services and provide opportunity for referral to specialised services.
- Support and monitor case management caseloads through monthly reflect and review sessions to ensure staff can deliver effective case management services.
- Balance our funding obligations with the individual needs of clients to ensure targets are met.
- Maintain appropriate complete client records in accordance with relevant legislation and organisational policies and processes

### **Transition or exit from programs**

Beyond Housing is committed to providing clients with information and support through the process of transition or exit from programs. We will ensure:

- All clients are provided with the necessary information and explanation in appropriate communication formats in relation to their transition/exit from the service
- Clients are provided with information and support through the process of transition or exit from programs
- Client transition strategies and exit planning will be documented on the client's file
- The client exit process for programs is clear and that the organisation adopts fair and non-discriminatory processes when a client chooses to or is required to leave the service through meeting case plan objectives.

## Training


Beyond Housing will ensure that workplace participants delivering case management support will receive appropriate induction and ongoing professional development to enable them to develop and specialised skills and ensure their knowledge remains current regarding case management practice.

## Definitions

<b>Case Management</b>	A planned response, providing tailored support to meet the needs of each client. The length of the time the service is provided is determined by the needs of the client and the funding and service agreement requirements.
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## Related

Document Reference	Document Type
<a href="#">Residential Tenancies Act 1997 (Vic)</a>	Legislation
<a href="#">Children Youth and Families Act 2005 (Vic)</a>	Legislation
<a href="#">Disability Act 2006 (Vic)</a>	Legislation
<a href="#">Privacy and Data Protection Act 2014 (Vic)</a>	Legislation
<a href="#">Freedom of Information Act 1982 (Vic)</a>	Legislation
<a href="#">Privacy Act 1988 (Cth)</a>	Legislation
<a href="#">Health Records Act 2001 (Vic)</a>	Legislation
<a href="#">Charter of Human Rights and Responsibilities Act 2006 (Vic)</a>	Legislation
<a href="#">Family Violence Protection Act 2008 (Vic)</a>	Legislation
<a href="#">Access and Equity</a>	Policy
<a href="#">Advocacy</a>	Policy
<a href="#">Rights and Responsibilities</a>	Policy
<a href="#">Stakeholder Participation</a>	Policy
<a href="#">Feedback - Compliments and Complaints</a>	Policy
<a href="#">Working together with Aboriginal and Torres Strait Islander People</a>	Policy
<a href="#">Diversity</a>	Policy
<a href="#">Victorian Protective Data Security Standards (VPDSS) July 2016</a>	Other
<a href="#">Family Violence Protection (Information Sharing and Risk Management) Regulations 2018 (Vic)</a>	Other
<a href="#">Tenancy Plus – tenancy support program operational guidelines November 2021</a>	Other
<a href="#">A Place to Call Home</a>	Other

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