

## BASIC NEEDS ASSESSMENT & CASE MANAGEMENT

A MINIMUM OF 6 HOURS

### COMPONENT OUTLINE

#### LEARNING OBJECTIVE

To provide victim service professionals with a working understanding of the role of an advocate, assessment of client needs and case management planning. The victim service professional will gain awareness of personal limitations and will enhance his/her professionalism. The victim service professional will understand and develop problem solving techniques, as well as the knowledge, skills and abilities to assess victims' needs. Further, the victim service professional will acquire the knowledge, skills and abilities needed for case management planning.

#### TOPIC STRUCTURE

- A. ROLE DEFINITION AND INTROSPECTION
- B. ASSESSING CLIENT NEEDS
- C. CASE MANAGEMENT PLANNING
- D. BIBLIOGRAPHY

#### EXPANDED COMPONENT OUTLINE

##### A. ROLE DEFINITION AND INTROSPECTION

###### 1. Define Professional Role of the Advocate

The advocate is one that pleads the cause of another, or one that defends or maintains a cause or proposal. The advocate fulfills many roles while acting as an advocate.

- a. Problem Solver
  - 1. Identification
  - 2. Needs assessment
  - 3. Decision making
  - 4. Mediation
  - 5. Negotiation
- b. Counselor
  - 1. Crisis intervention
  - 2. Follow-up counseling
  - 3. Significant others
  - 4. Confidentiality
    - a. Electronic age
    - b. Legal requirements
    - c. Subpoenaed records

- c. Consultant
  - 1. Training and education
    - a. Public agencies
    - b. Service providers
    - c. Criminal justice agencies
    - d. Community groups
  - 2. Victimology expert
    - a. Expert testimony
    - b. Crime dynamics, syndromes, patterns, etc.
  - 3. Public speaker
    - a. Fund raising
    - b. Promoting program goals
    - c. Public awareness
- d. Data Collector/Case Documenter
  - 1. Documents client files
  - 2. Keeps records for administration
  - 3. Shares information/gathers information
  - 4. Computers
- e. Goal keeper
  - 1. Recognizing program goals
  - 2. Establishing boundaries/limit setting

## 2. Self Evaluation

The advocate should be aware of what attitudes and skills he/she brings to the job of advocate. The advocate should be cognizant that the client's needs take precedent over the advocate's personal needs. Finally, the advocate should know how her/she is to present him/herself and how to be effective in the job.

- a. Recognizing one's own limitations
- b. Personal needs vs. client's needs
  - 1. Helper vs. rescuer
  - 2. Stress/burn-out
- c. Prejudices and biases
- d. Personal demeanor
  - 1. Dress
  - 2. Language
  - 3. Getting along with others
    - a. Co-worker
      - 1. Staff meetings
      - 2. Brainstorming
      - 3. Debriefing
      - 4. Humor

- b. Attorneys
  - 1. Prosecutor
  - 2. Defense attorney
  - 3. Other
- c. Law enforcement
  - 1. Develop a liaison
  - 2. Participate in ride-alongs
  - 3. Informal chats
  - 4. Offer training
  - 5. Non-victim calls
  - 6. Furnish information/confidentiality
- d. Judiciary
  - 1. Knowledge of rules of court
  - 2. Preparation for court appearance
  - 3. Respect for courtroom rules
  - 4. Courtroom demeanor
  - 5. Interaction with court personnel
- e. Service providers
  - 1. Knowledge of services provided
  - 2. Criteria for services
  - 3. Operating hours
  - 4. Offer training
  - 5. Request training
  - 6. Sight/program visit
- 4. Interaction with the public
  - a. Representing the agency
    - 1. Know office policy and procedures
      - a. Press release
      - b. Public speaking
      - c. Training
  - b. Behavior on-duty and off-duty
    - 1. Use of I.D./Badge/Business cards
    - 2. Accepting Gifts/Gratuity
    - 3. Behavior which is unbecoming and reflects on agency
- 5. Ethics
  - a. Honesty
  - b. Loyalty
  - c. Confidentiality
    - 1. Legal responsibilities
    - 2. Internal policies
  - d. Prejudices/Biases

### 3. Safety Issues and Risk Factors

The advocate should be advised of various risks that may be encountered during the performance of one's job. In addition, prevention measures should be discussed.

- a. Crisis response teams
- b. Crime scene response
- c. Field visits
- d. Office security
- e. Public building security
- f. Critical incident
  - 1. Policy
- g. Risk potential
  - 1. Transportation
  - 2. Home visits (especially family violence cases)
  - 3. Lobbies
  - 4. Public access facilities
    - a. Courtroom waiting areas including hallways
    - b. Courtrooms
    - c. Hospital waiting area
- h. Reducing risks
  - 1. Criminal record checks (not allowed without the permission of the client)
  - 2. Teams
  - 3. Call-back procedures
  - 4. Law enforcement escort
  - 5. Staffing case (assessing potential danger)
  - 6. Cellular telephones, car radios, hand held radios, etc.
  - 7. Crisis intervention training
  - 8. Self-defense training
  - 9. Chemical mace
  - 10. Recognizing signs of persons under the influence of drugs and/or alcohol
  - 11. Recognizing signs of mental illness
  - 12. Communication with Other staff members re: difficult people

## B. ASSESSING CLIENT NEEDS

### 1. Communication Skills

The advocate should be trained in verbal and non-verbal communication skills, including active listening and interviewing. The advocate should be advised as to how to interact with difficult people.

- a. Active listening
- b. Interviewing skills
- c. Verbal and non-verbal
- d. Dealing with difficult people

## 2. Risk Assessment

The advocate should assess the current risk of the client and what actions should be taken to ensure the client's safety.

- a. Suicide potential
- b. Physical safety

## C. CASE MANAGEMENT PLANNING

A process of coordinating a range of services and following a comprehensive plan.

1. Translation of assessment data (identification of needs) into a plan of action.
  - a. Evaluation of the client's unique circumstances, strengths, needs, weaknesses, expectations.
  - b. Enhancement of empowerment, limiting dependence.
  - c. Knowledge of community resources/system realities.
  - d. Funding sources.
  - e. Develop a client individualized plan of services, resources and activities.
  - f. Allowing for stages of victim recovery.
    - Denial and numbing
    - Depression and withdrawal
    - Anger and reorganization
    - Integration and empowerment
2. Goals
  - a. Quality service
  - b. Service coordination
  - c. Accountability
  - d. Cost effective resources
  - e. Evaluation in terms of client's progress
  - f. Utilization of a strategy which assists an individual to make his/her own decisions
  - g. Knowing when to close the case and say goodbye
3. Traced to the beginnings of social work at the beginning of this century.
  - a. Foundation of case management procedures stem from Jane Addams and other early social reformers.
  - b. Development of:
    - Professional standards and methods
    - Systematic collection of information
    - Networking with other disciplines (case conference)
    - Networking with other agencies