Advising as Case Management

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What is “Case Management”

- It is a “collaborative process of assessment, planning, facilitation, and advocacy for options and services that meet an individual’s needs through communication and available resources to promote quality, cost-effective outcomes”.

Case Management Society of America, 2008.
Universal Functions of Case Management

- Identifying and attracting clients
- Intake and assessment of needs
- Development of a service plan
- Advocating for client needs
- Brokerage (referral to) of services
- Implementation/monitoring service plan
- Evaluating/adjusting plan as needed
- Determining outcomes of plans
Common Barriers to Student Success

- Financial
- Work/Family/School conflicts
- Academic deficiencies
- Time management issues
- Unrealistic expectations (own/others)
- Lack of awareness of resources
- Unwilling to ask for help or admit need
- Uncertainty of goals/plans
What should “good” advising include?

- Outreach
- Referral or brokerage
- Ongoing assessment
- Advocacy
- Evaluation
Using a Case Management Model

Considerations:
› Setting the stage for meetings
› Using good communication for intake
› Conduct intake; show empathy; build trust
› Use the “right” words
› Be mindful of body language and non-verbal cues
› Use empathic listening skills
› Set and maintain professional boundaries
› Work within appropriate time limits
Understanding Problems

- Clearly understand the cause
- Make decisions that lead to problem resolution
- Consider what motivates each student
- Help students establish problem ownership
- Teach the DECIDE Model of decision making and illustrate its use
The DECIDE Model

- Creates a framework for more rational and timely decision making
  - Define the decision to be made
  - Estimate the resources needed
  - Consider alternative possibilities
  - Imagine the consequences of each
  - Develop an implementation plan and act
  - Evaluate the results of action
Why Students Avoid Seeking Help

- Fear of the unknown
- Procrastination
- Fear of making a mistake
- Fear of taking responsibility
- Feeling overwhelmed
- Relies too much on opinions of others
- Feeling overwhelmed and confused
- Denial of problem(s)
- Decidophobia
Case management techniques can be used to increase effectiveness of academic advising.

Barriers to success can be ameliorated or eliminated through good client assessment and effective referrals.

Advisors should assist students in developing good problem solving and decision making skills.
References


Richardson, R. (2008). A case management approach to academic advising. The Mentor, Penn State (available at dus.psu.edu/mentor)

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