

Case Compass Toolkit

Supporting countries in developing a case management information system (CMIS)

ESSC 2022 - Plenary 1:
Supporting strategic change and decision-making

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Why Case management?



CITIZENS

Face multidimensional and complex needs



GOVERNMENTS

Respond by offering a myriad of benefits and services



Case management helps match clients' needs with benefits & services

Why Case management information systems?

TO HELP SOCIAL WORKERS

- Spend more time talking to clients and less on bureaucracy
 - Have more information on beneficiaries
 - Organize their daily tasks
- higher quality social service provision

DECISION MAKERS CAN USE DATA TO:

- Monitor implementation of programs
- Plan services that meet beneficiaries' needs
- Identify gaps in service provision/areas at risk

Experience of a team of experts across disciplines:

Responding to countries' requests to improve case management programs' effectiveness



Chile



Greece



Italy

Our goal

A [toolkit](#) to support selected countries to develop their own information system for case management



Case Compass Guide

A digital guide to the fundamentals of case management and Case management information systems.



Case Compass Prototype

Showcasing different modules & functionalities of case management information systems.



Case Compass Learn

Tailored advice (clinics) from the Case Compass team on setting up and running a Case management information systems. project.



Use the Case Compass Guide and get inspired from other countries

Enabling factors

- Social & employment services**
Because case management works by directing beneficiaries to benefits and services, it is important that there are enough social and employment services to inform or refer beneficiaries to.
- Previous experience in case management**
It helps if a country has case management experience developed through at least one pilot program (or more established professional social services) or adequate resources in place to train social workers case management.
- Institutional & strategic support**
If help of case management services will be part of an institutionally well-established entity. Ideally, they will also be part of a broader strategy.
- Sources of financing**
Case management and CMBs cost money to implement and maintain. It helps to work with a government willing to finance the development of the CMBs, and one which can bring in the required expertise (the World Bank may help with terms of reference and other necessities).

Browse all country cards

- Armenia
- Brazil
- Chile
- Colombia
- Costa Rica
- Greece
- Italy
- Montgomery

Key enabling factors

Read about key enabling factors to introduce a Case management information system in a country

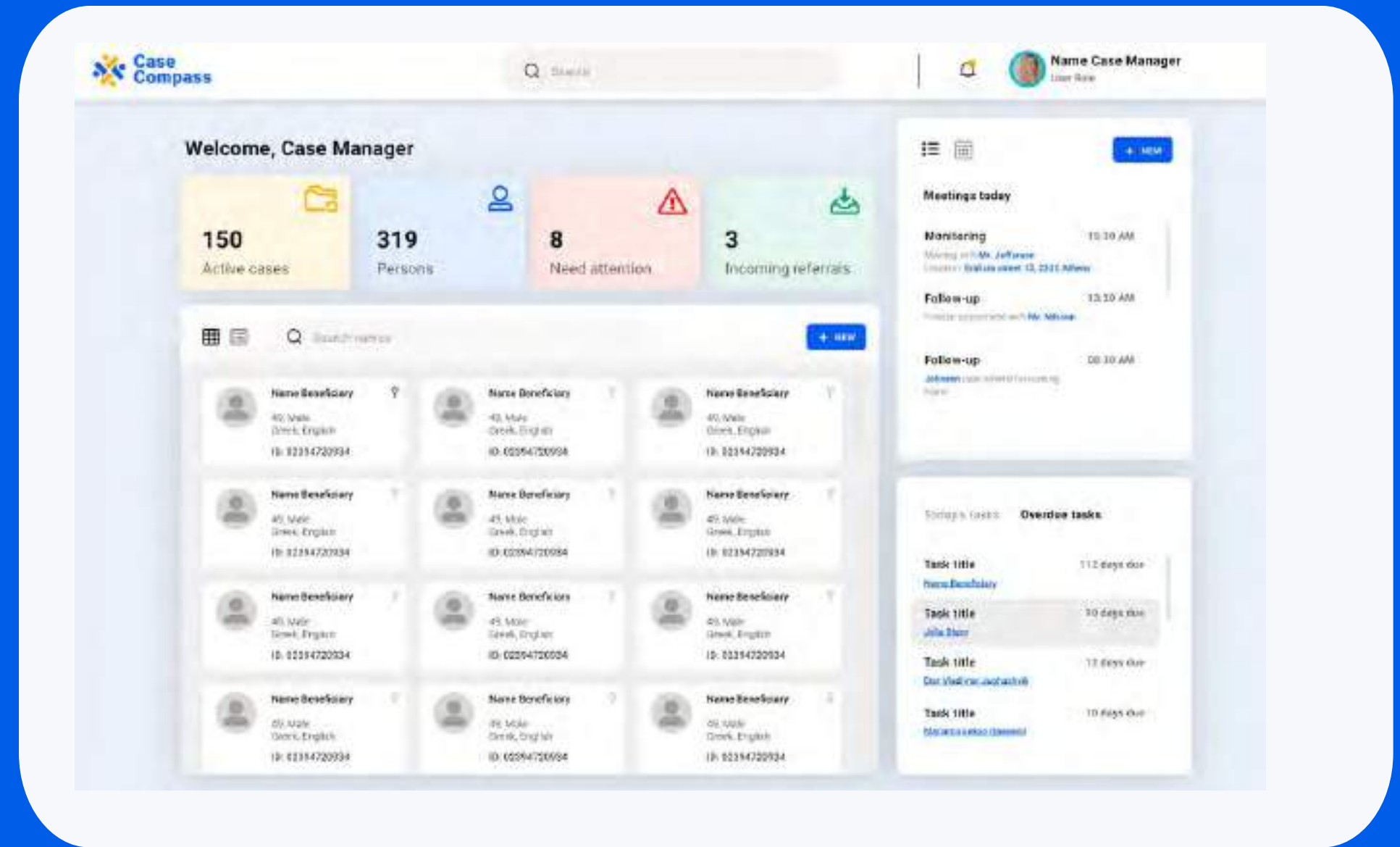
Learn about existing Information systems

Browse existing Case management information systems in other countries to get inspired (via an easy conceptual framework)

What's the purpose of the Case Compass Prototype?

Key modules:

- Profiling
- Assessment
- Intervention plan design
- Monitoring
- Referrals



Demo versions

A demonstration of what a Case management information system can do, not a piece of software to implement.

Flexibility

A modular tool, that can grow or shrink in complexity to demonstrate Case management information systems.



Critical elements: lessons from experience

HUMAN-CENTERED DESIGN

and validation with users

INTEROPERABILITY

between databases of different national & local administrations or service providers

GOVERNMENT CAPACITY

for helpdesk and training of operators

POLICY MONITORING

by proactively using data and, eventually, fine tuning the program

Two concluding observations

A Case Management Information System does not substitute the need to:

- 1 strengthen capacity of social services at the local level
- 2 local coordination and protocols between different agencies to follow complex cases

Thank you!

Find us on: case-compass.org



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