



Developing Case Management in Canada: Standards of Practice, Learning Resources and Professional Association

FINAL EVALUATION AND REPORT

MAIN MESSAGES

With crucial support from Health Canada, the National Case Management Network of Canada (NCMN) has begun to build a truly national conversation on the future of Canadian Case Management. In systematically achieving our immediate goals and benchmarks outlined in the Contribution Agreement, NCMN has been able to engage with the Case Management community, thereby generating a critical conversation on the needs of these health and social service providers: Canada's Case Managers.

- Although increasingly recognized for its merits, the practice of Case Management in Canada remains somewhat fragmented and ad hoc.
- There is a growing need for a continued centralized national discussion about its future trajectory.
- Incremental steps toward greater standardization and professionalism have been extremely well received and there is an emerging mandate for credentialing on a national level.
- Existing NCMN members are overwhelmingly satisfied with the level and characters of the services provided to them and share the organization's vision for a future of national collaboration and interaction.
- In surveying prospective members, it has become clear that only if a credentialing process is established will NCMN be able to gain broad representation across all sectors and areas.
- Given that practicing Case Managers have limited time for engagement with educational materials; seminars, conferences, and other events are helpful to maintaining their professional currency.
- The most important finding established through our ongoing conversations with stakeholders, members and others is that if Case Management is to realize the full breadth of its potential it requires concrete steps toward professionalism including core competencies and ultimately credentialing.
- While there remains some consensus building about how and at what rate this process should proceed, there is a clear agreement that simply providing national standards of practice and standardized educational material will be insufficient to developing a Case Management body of knowledge.
- Without this next step, the great potential of Case Management will be under-realized.

The NCMN of Canada is established as a non-profit, membership-based, interdisciplinary, professional organization. Its mandate is the advancement of Case Management providers to benefit individual Canadians, their families and supporters, and the Canadian health care system.

EXECUTIVE SUMMARY

The practice of Case Management has been globally recognized for its unique capacity to support clients in achieving safe and realistic goals within an increasingly complex health, social and fiscal environment. Despite being practiced by an ever-increasing number of individuals and integrated into the operations of various organizations, it has lacked a strong centralized voice within Canada. Responding to this need, the National Case Management Network of Canada (NCMN) has emerged as the leading national organization that fortifies the many care providers involved in Case Management. Established as a non-profit, membership-based, interdisciplinary body, NCMN has begun to articulate a mandate for advocacy, support and professionalism in Case Management.

With crucial support from Health Canada's Health Care Policy Contribution Program for the project "Developing Case Management in Canada: Standards of Practice, Learning Resources and Professional Association" NCMN has continued to build and define its role as an interdisciplinary forum for a national conversation about the profession's future role. In this way it has served to promote excellence and professionalism among Case Management providers across the country, thereby laying the groundwork to support the long-term goals of increased professionalism and credentialing. In doing so the organization has achieved a number of important milestones and identified the most central challenges facing Canadian Case Management today.

Through undertaking our project, NCMN has met a number of crucial benchmarks both in terms of its own capacity building as well as in forming new linkages to the broader Case Management community. Despite the importance of these immediate developments, our Health Canada funding has allowed NCMN to gain a much more acute understanding of the issues facing the industry and the needs of individual practitioners across a range of disparate fields.

Our activities in 2010/11 have focused on three mutually reinforcing Core Priorities:

1. Building NCMN's organizational sustainability and future momentum;
2. Establishing communication and building networks among key stakeholders, institutions and individual practitioners across all provinces; and
3. Providing essential services and educational resources to NCMN members as well as the wider Canadian Case Management community.

As a result of our more immediate initiatives undertaken to realize these long-term goals, we have achieved a number of crucial milestones that have already begun to yield tangible results. Organized according to our three Core Priorities, our Health Canada funding has been instrumental to the success of a number of more immediate goals in 2010/11.

PROMOTING EXCELLENCE AND PROFESSIONALISM FOR CASE MANAGEMENT IN CANADA

PHASE II: CORE COMPETENCIES, CREDENTIALING AND SUSTAINABILITY

Executive Summary

Case Management is a collaborative, client-driven process for the provision of quality health and support services through the effective and efficient use of resources. Case Management supports the clients' achievement of safe, realistic, and reasonable goals within a complex health, social, and fiscal environment.

"Canadian Standards of Practice for Case Management"

In a few short years, the National Case Management Network of Canada (NCMN) has emerged as the leading national organization that fortifies the dedicated health care providers who coordinate, advocate and navigate a collaborative client-driven process for the provision of quality health and support services through the effective and efficient use of resources. These dedicated health care providers support clients to achieve safe, realistic and reasonable goals within a complex health, social and fiscal environment: Canada's Case Managers.

NCMN has begun to promote excellence and professionalism among Case Management providers across Canada. Support from Health Canada's Health Care Policy Contribution Program allowed for the distribution of Standards of Practice, provision of Learning Resources and the existence of a Professional Association. This established a foundation on which to identify, attract and prepare highly skilled interdisciplinary health care providers of Case Management. Health Canada's support also allowed for the initiation of the development of a national competency profile and the selection of a competency framework. The selection of a competency framework now allows for the development and validation of core competencies and the selection of a credentialing process to indicate competence in Case Management.

The project "**Promoting Excellence and Professionalism for Case Management in Canada: Phase II Core Competencies, Credentialing and Sustainability**" meets the mandate of NCMN to advance Case Management providers for the benefit of individual Canadians, their families and supporters, and the Canadian health care system. The project also aligns with Health Canada's health human resource policy framework to optimize Canada's health workforce under the increasingly demanding and complex healthcare needs of Canadians.

Specifically, NCMN seeks to promote excellence and professionalism among Case Management providers across Canada through the following service activities:

- Developing core competencies in Case Management
- Validating core competencies in Case Management
- Selecting a credentialing process to indicate competence in Case Management
- Executing a Marketing and Communications Plan to move NCMN from existence to sustainability

This project will create the platform for sustainability, visibility and advocacy of excellence and professionalism in Case Management across Canada.

PROJECT DESCRIPTION

Project Goal

The National Case Management Network of Canada (NCMN) has begun to promote excellence and professionalism among Case Management providers across Canada. Support from Health Canada's Health Care Policy Contribution Program allowed for the distribution of Standards of Practice, provision of Learning Resources and the existence of a Professional Association. This established a foundation on which to identify, attract and prepare highly skilled interdisciplinary health care providers of Case Management.

Health Canada's support also allowed for the initiation of the development of a national competency profile including review of relevant documents and literature, review of Case Management related background information and recommendations for a competency framework. A Role-based Framework was selected as the structure to support the development of Case Management competencies. A Role-based Framework is evidence-based, needs driven and outcome-measured. The selection of a competency framework now allows for the development and validation of core competencies and the creation of a credentialing process to indicate competence in Case Management.

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Project Background and Rationale

Background

In a few short years, NCMN has emerged as the leading national organization that fortifies the dedicated health care providers who coordinate, advocate and navigate a collaborative client-driven process for the provision of quality health and support services through the effective and efficient use of resources. These dedicated health care providers support clients to achieve safe, realistic and reasonable goals within a complex health, social and fiscal environment: Canada's Case Managers.

In November 2006, the National Case Management Network of Canada was established. The NCMN is federally incorporated as a non-profit professional organization that is membership-based, interdisciplinary, and dedicated to the support and advancement of Case Management providers. Our membership embraces individuals and organizations engaged in the field of Case Management and represents diverse health and social service domains, which include practice, education, research, quality improvement, and management positions. For example, NCMN represents health care providers from the following sectors:

Academics	Mental Health
Acute Care	Regional Health Authorities
Community Care Access Centres	Rehabilitation
Community Support Agencies	Research
Department of National Defense	Therapy Services
Disability Management	Veterans Affairs Canada
Long Term Care	Workplace Compensation & Insurance Board

Rationale

Now permanently based in downtown Toronto, NCMN provides the much-needed professionalism for Case Management providers through the distribution of Standards of Practice, provision of learning resources, networking opportunities and establishment of a professional association. NCMN is the leading membership association unifying Case Management providers into an interdisciplinary body who connects, communicates and collaborates across the health care continuum to advocate for improved health outcomes and wellbeing of patients and clients. NCMN's role in fortifying a network that supports and sustains all providers of Case Management aligns with Health Canada's health human resource policy framework to optimize Canada's health workforce under the increasingly demanding and complex healthcare needs of Canadians.

Case Management is practiced by an ever-increasing number of individuals and organizations. Case Managers are known for their skills as effective communicators, problem solvers, and visionaries. For this reason, they benefit from joining voices with thousands of others who are speaking out and sharing experiences. Practice domains cross disciplines and sectors locally, provincially, nationally and internationally. The benefits of Case Management increase exponentially when Case Managers integrate their knowledge, skill and practice across these spectrums. National leadership provides an opportunity for Case Managers to team up across the country and across sectors in applying evidence and best practice to care management. Practice standards are usually statements about what the professional is required and expected to do. They specify the legal and ethical requirements for professional practice and define the boundaries of the profession, including the requirements and qualifications to practice. Typically broad in nature, standards illustrate the varied settings and roles in which professionals practice. On the other hand, competencies, which are usually underpinned by standards, are more detailed in scope. They normally help to position a profession within its practice and regulatory environments and provide a clear understanding for the public about professional roles. While standards and competencies have content overlaps, there are still distinguishable differences between the two, and together form a distinct body of knowledge and provide a Standard of Care. A Standard of Care communicates the capabilities and competencies of Case Managers to the many Canadian constituencies including health care system, government, commerce, military and the general public.

This project will create the platform for sustainability, visibility and advocacy of excellence and professionalism in Case Management across Canada by creating a distinct body of knowledge and provide a Standard of Care. Support from the federal government has been and will continue to be integral to the success of Phase II of this project. The objectives outlined in this project will not come to fruition without the funding requested. NCMN anticipates the key challenge in implementing the objectives of this project to be the timely funding of Phase II following the completion of “**Developing Case Management in Canada: Standards of Practice, Learning Resources and Professional Association**”.

Mandate of the Applicant

The NCMN of Canada is established as a non-profit, membership-based, interdisciplinary, professional organization. *Its mandate is the advancement of Case Management providers to benefit individual Canadians, their families and supporters, and the Canadian health care system.* The motto of NCMN is to connect, collaborate, and communicate the power of Case Management. The activities outlined in this project to develop core competencies, validate core competencies, select a credentialing process to indicate competency in Case Management and execute a marketing and communications plan for strategic launch of national core competencies and credentialing meet the mandate of NCMN.



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