



EFFECTIVE SCHOOL CASE MANAGEMENT



(B) STRATEGIES

1. **Undeveloped** = This CM process/strategy/structure is *not* established at all
2. **Developing** = This CM process/strategy/structure is in the *process* of being established
3. **Developed** = This CM process/strategy/structure *is* established and operating effectively *most* of the time
4. **Well established** = This CM process/strategy/structure *is* established and operating effectively *all* of the time

4. PLANNING

Circle level

A collaborative and dynamic process of establishing a coordinated action plan with key stakeholders

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| 1. An agenda is circulated before the case conference | 1 2 3 4 |
| 2. Meeting protocols are established and understood by all parties before starting the case conference | 1 2 3 4 |
| 3. Based on the needs of the student, a detailed outcomes focused action plan is collaboratively developed, consisting of intended outcomes and strategies, specific time frames, review dates, a projected date for the transition/closure/completion of CM, the roles and responsibilities of all stakeholders, and a set of criteria/performance indicators to enable an evaluation of the outcomes | 1 2 3 4 |
| 4. Available quality resources and services to achieve the action plan's outcomes are identified | 1 2 3 4 |
| 5. Where such resources and services are limited or unavailable, contingency strategies (eg. advocating for new resources/services to be developed) are established to ensure maximum success in meeting the student's needs | 1 2 3 4 |
| 6. The student and his/her parents/caregivers are actively encouraged to participate in the identification of resources and services, and where appropriate, independently access alternative options when there are limitations of choice | 1 2 3 4 |
| 7. The action plan is documented in a format that makes sense to the student and all stakeholders | 1 2 3 4 |
| 8. All stakeholders, including the student, are signatories to the action plan | 1 2 3 4 |
| 9. The action plan is given to all stakeholders at the end of the conference | 1 2 3 4 |

NOTES