

# Collaborative Case Management: Insights from BC

**Alliance**  
for BC Settlement  
Case Management

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Angelika Valchar: CVIMS

Mary Tanielian: Langley Community Services Society

## ALLIANCE PARTNERS INCLUDE:





# What is Case Management?

- A client centered, comprehensive approach to settlement program service delivery for eligible clients facing multiple barriers to integration
- Services provided can be up to maximum 18 months

## You must be

Facing many complex challenges adjusting to life in Canada.  
These may include:



Housing concerns



Family issues



Trauma



Loneliness



Financial problems



Domestic violence



Medical and mental health concerns



Language and communication barriers



Digital literacy and job readiness challenges



Difficulty receiving social benefits or government support

And



A permanent resident, or



Selected to be a permanent resident with a letter from Immigration, Refugees, and Citizenship, Canada (IRCC), or



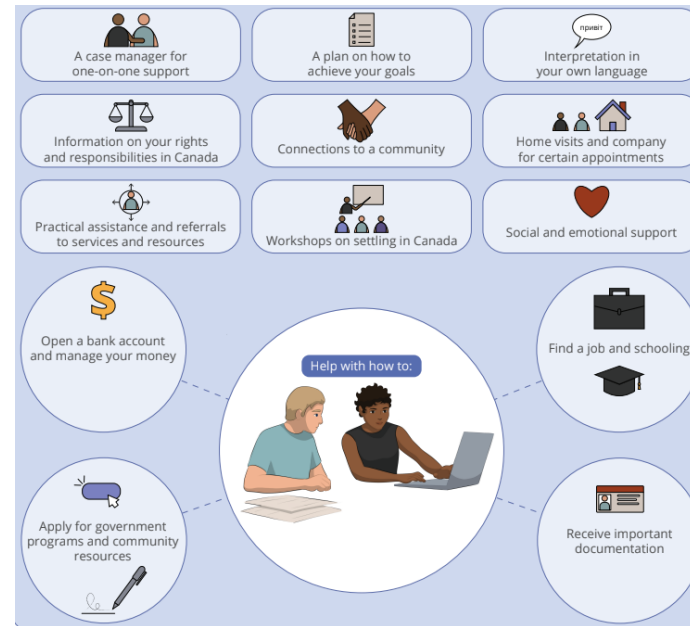
A refugee or protected person (as per S.95 of IRPA), or



Have Canada-Ukraine authorization for emergency travel (CUAET/AVUCU)

# Activities:

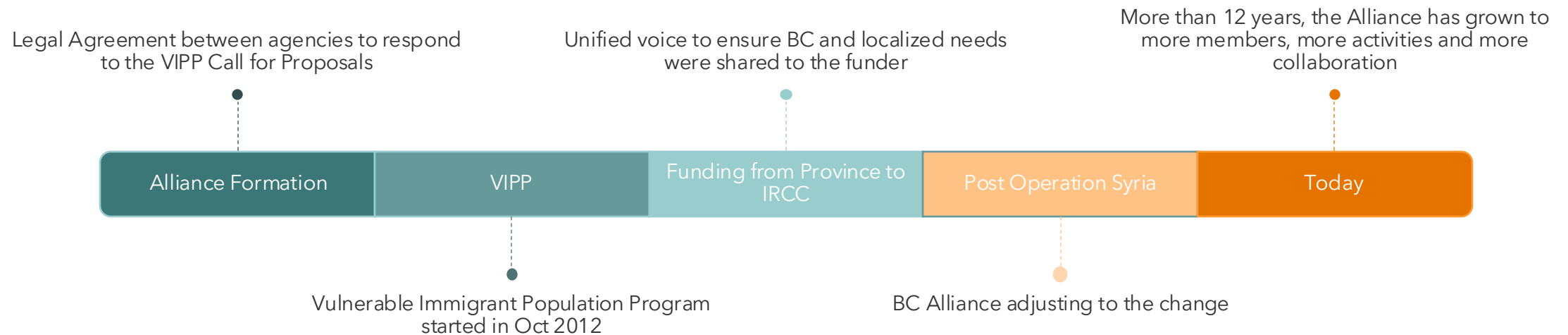
- Needs and assets assessment
- Settlement plan
- Information and orientation
- Referrals
- Client accompaniment and/or home visits
- Regular check-ins
- Exit assessment and transition support



# Where it all began

History of the  
Alliance

# Timeline for BC Alliance for Case Management



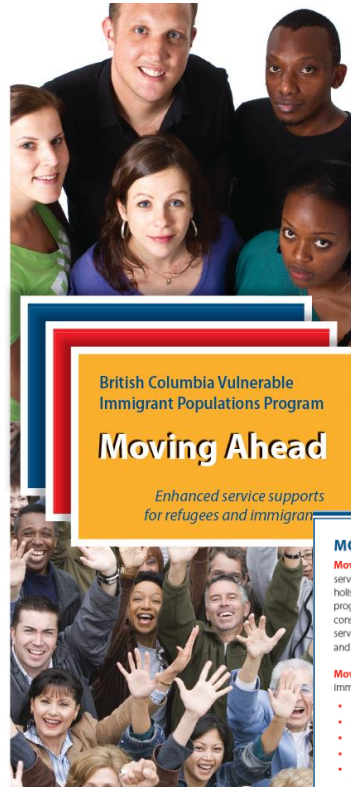
# A Bit of Nostalgia



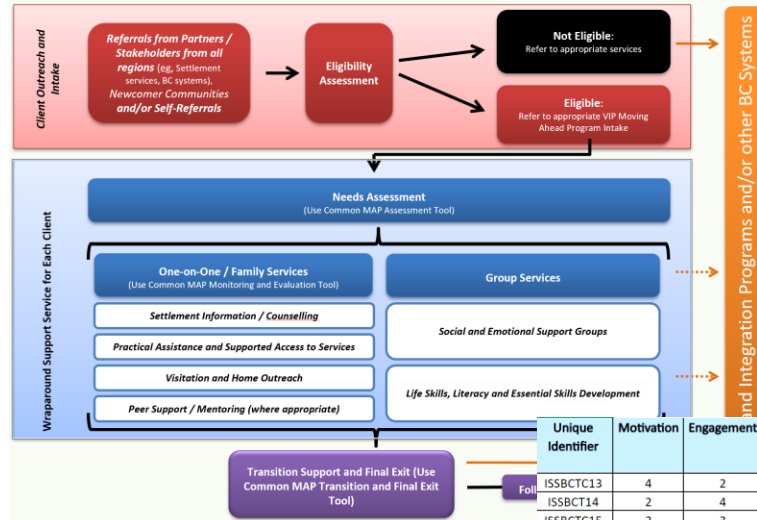
## MOVING AHEAD ALLIANCE MEMBER AGENCIES



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## MOVING AHEAD PROGRAM (MAP) – CLIENT FLOW



Unique Identifier	Motivation	Engagement	Participation	Progress towards Goals <sup>1</sup>	1a	1b	1c	2a	2b	3a	3b	4a	5a	5b	5c	6a
ISSBCTC13	4	2	4	3	3	3	1	4	3	2	1	1	4	4	5	
ISSBCTC14	2	4	3	2	3	5	N/A	1	1	2	2	N/A	3	2	3	1
ISSBCTC15	2	3	4	4	3	3	2	5	3	3	3	4	4	4	3	
ISSBCTC116	3	2	4	2	3	3	3	4	3	1	1	3	3	4	3	
ISSBCTC17	4	4	5	3	2	3	N/A	3	2	2	N/A	2	2	2	3	4
ISSBCTC018	4	3	3	4	3	5	3	5	3	2	2	5	3	3	3	5
ISSBCTC019	4	4	4	4	4	2	N/A	5	3	3	3	N/A	4	3	4	5
ISSBCTC020	3	3	3	3	2	3	4	4	3	3	3	4	4	3	4	5
ISSBCTC021	3	2	3	3	4	4	N/A	3	3	4	3	N/A	4	3	4	4
ISSBCTC022	4	4	3	4	3	3	4	4	4	4	4	3	4	4	4	5
ISSBCTM-46	3	3	3	3	2	2	1	3	1	1	1	2	1	2	1	2
ISSBCTM-47	3	2	2	2	4	5	3	5	5	4	3	3	5	4	5	5
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ISSBCTM-61	4	4	4	3	2	3	2	3	3	2	2	2	2	3	2	2

**MOVING AHEAD PROGRAM**  
**Moving Ahead** is a collaborative, case-managed service model for the delivery of comprehensive, holistic and client-centred programming. The program chiefly utilizes outreach and in-home consultation and support as a foundation for service delivery to the **most vulnerable** refugees and immigrants in British Columbia.

**Moving Ahead** provides eligible refugee and immigrant clients with the following services:

- intake and assessment;
- case management of individual client files;
- social and emotional support;
- settlement information and counselling;
- life skills, literacy and essential skills development;
- practical assistance; and
- supported access to services.

**Eligibility includes refugees and immigrants who:**

- need to learn about Canadian systems;
- experience complex life situations; or
- have defined hardships and difficulties.

**Moving Ahead provides service in more than 40 languages** including Sign and PwO (Karen languages), Nuer and Nuba, Somali, Arabic, Assyrian, Kirundi and Kinyarwanda, Chin, Farsi, Dari, Pashto, Nepali, French, Vietnamese, Burmese, Swahili, Oromo, Amharic and Tigrinya.

**THE BC VIPP ALLIANCE**  
**Moving Ahead** was established in 2012 by the BC Vulnerable Immigrant Populations Program (VIPP Alliance). The VIPP Alliance is comprised of seven leading refugee- and immigrant-serving organizations:

- Abbotsford Community Services
- DIVERSEcity Community Resources Society
- Immigrant Services Society of BC
- MOSAIC
- North Shore Multicultural Society
- S.U.C.C.E.S.S.
- Victoria Immigrant and Refugee Centre Society

The BC VIPP Alliance is committed to ensuring a better future for B.C.'s vulnerable newcomers. Together we are committed to implementing a cross-regional approach that will ensure vulnerable refugee and immigrant populations receive consistent levels of service regardless of their geographic location. The BC VIPP Alliance works collaboratively in the following ways:

- establishing cross-regional and cross-sector referral protocols to facilitate more effective service delivery;
- standardizing assessment and monitoring forms and processes; and
- sharing cross-regional information, as well as the development of key competencies.

**CONTACT INFORMATION**  
**(October 1, 2012 - March 31, 2014)**

**Abbotsford Community Services**  
 phone: 604-859-7544 ext 227  
 pavla@delia@abbotsfordcommunityservices.com  
 www.abbotsfordcommunityservices.com

**DIVERSEcity Community Resources Society**  
 Surrey, Langley, North Delta  
 phone: 604-654-4015  
 movingahead@delia@dcrs.ca  
 www.dcrs.ca

**Immigrant Services Society of BC (ISS of BC)**  
 79-Cities, Maple Ridge  
 phone: 778-363-1438  
 movingahead@issbc.org  
 www.issbc.org

**MOSAIC**  
 Burnaby, New Westminster  
 phone: 604-636-4712  
 movingahead@mosaicbc.com  
 www.mosaicbc.com

**North Shore Multicultural Society (NSMS)**  
 North Vancouver  
 phone: Farah Yekani@nsms at 604-988-2931  
 farah@nsms.ca  
 www.nsms.ca

**S.U.C.C.E.S.S.**  
 Vancouver, Richmond, South Delta  
 phone: 604-265-5290  
 movingahead@successbc.ca  
 www.successbc.ca

**Victoria Immigrant and Refugee Centre Society (VIRCS)**  
 Victoria  
 phone: 250-363-9433 ext. 244  
 meg@vircsbc.ca  
 www.vircs.ca

Intake 3 Months 6 Months 9 Months Exit 15 Months 18 Months Unique Clients Sh

# The Design of the Alliance

## **Alliance Coordinator**

- Integral part of the success of Alliance
- Created brochures and newsletters
- Coordinated and facilitated meetings and events

## **Executive Leadership**

- Legal contract & proposal writing
- Negotiate and plan collaboration between members
- Unified process, documents, voice

## **Managers and Supervisors**

- Operations of case management program
- Collaboration for streamline client services

## **Frontline Staff**

- Networking opportunities
- Training opportunities
- Share experience and successes



# The Purpose of the Alliance?

## **The mandate of the Alliance is to address the following objectives**

- Strengthen Inter-agency coordination and collaboration
- Support connections and relationship building among Alliance member agencies at senior leadership/supervisor and frontline level.
- Enhance capacity building through the development of resources, joint training sessions and knowledge exchange activities
- Ensure a consistent approach to case management
- Identify and address issues in a coordinated manner
- Contribute to the process of developing a national approach to case management

# How we do this work?

## Collaboration:

- Meetings
- Shared Decision Making
- Referrals
- Proposals

## Training/Research:

- Conferences
- Trainings
- SDI Project
- Resource Hub

## Engagement:

- All Levels of Staff Involved
- Contracted Coordinator
- Shared Alignment

# BC SDI Research Project on Collaborative Case Management Model

Toward a Shared Framework:  
Building Core Competence in Case Management

**Alliance**  
for BC Settlement  
Case Management

# Project Overview

## Purpose

- To examine the existing settlement case management interventions and produce an evidence and outcome-based settlement case management service model.

## Participating Agencies

- Nine participating Settlement Service Organizations varying in
  1. History, tradition, culture and expertise
  2. Size and services
  3. Location and targeted users



# Project Phases

**UBC Research Team:** Dr. Miu Chung Yan (UBC), Dr. Barbara Lee (UBC), Dr. Kurtee Chu (UBC), Frankie Cabahug (UBC), and Dr. Mooly Wong (MOSAIC)

## Establish Baseline of Existing Case Management Services

- Client Focus Groups in 4 Languages
- Case Manager Interviews
- Documentation Review

## Develop the Collaborative Model

- Case Manager Feedback Surveys
- Engaging Stakeholders: Alliance supervisors and senior executives

## Implement Case Management Model

- Training Workshops
- Practice Guidelines

## Test and Evaluate the Collaborative Model

- Client Focus Groups in 4 Languages
- Client Pre- & Post-Service Surveys in 12 Languages
- Case Manager Survey at Client Exit

**Quarterly Working Group Meetings, Led by MOSAIC**

# Overview of the Collaborative Model

Informed by *the idea of collaboration* in the wrap-around model, the Collaborative Model is to **enhance** current case management model without making any fundamental change by addressing *three major issues*:

## Consistency in programming: variation in

- a. eligibility for case management service,
- b. intake/screening process,
- c. documentation system & process,
- d. evaluation of service & service outcomes.

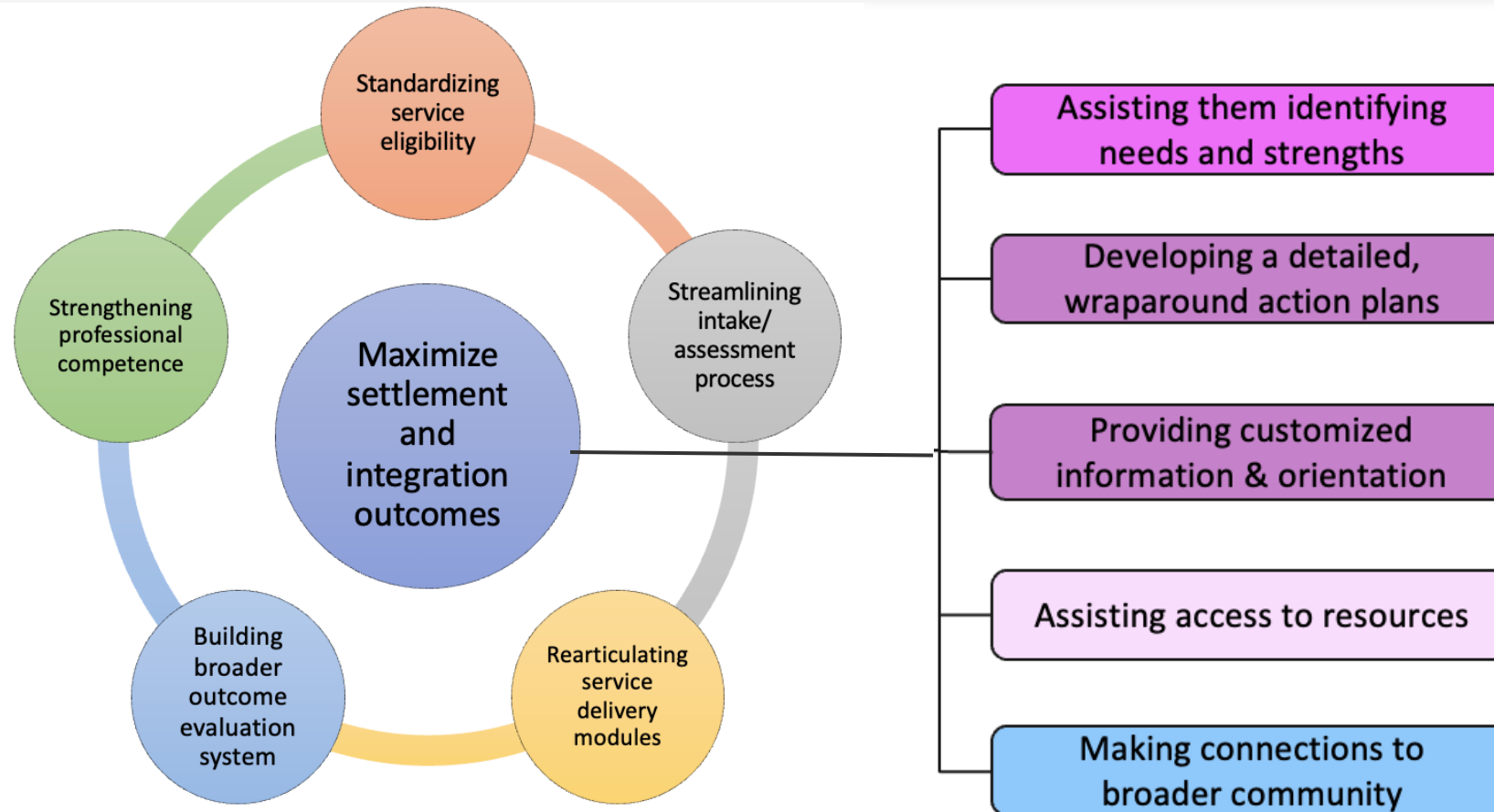
## Accountability of service:

Strengthening quality assurance of service provided & professional support for case managers

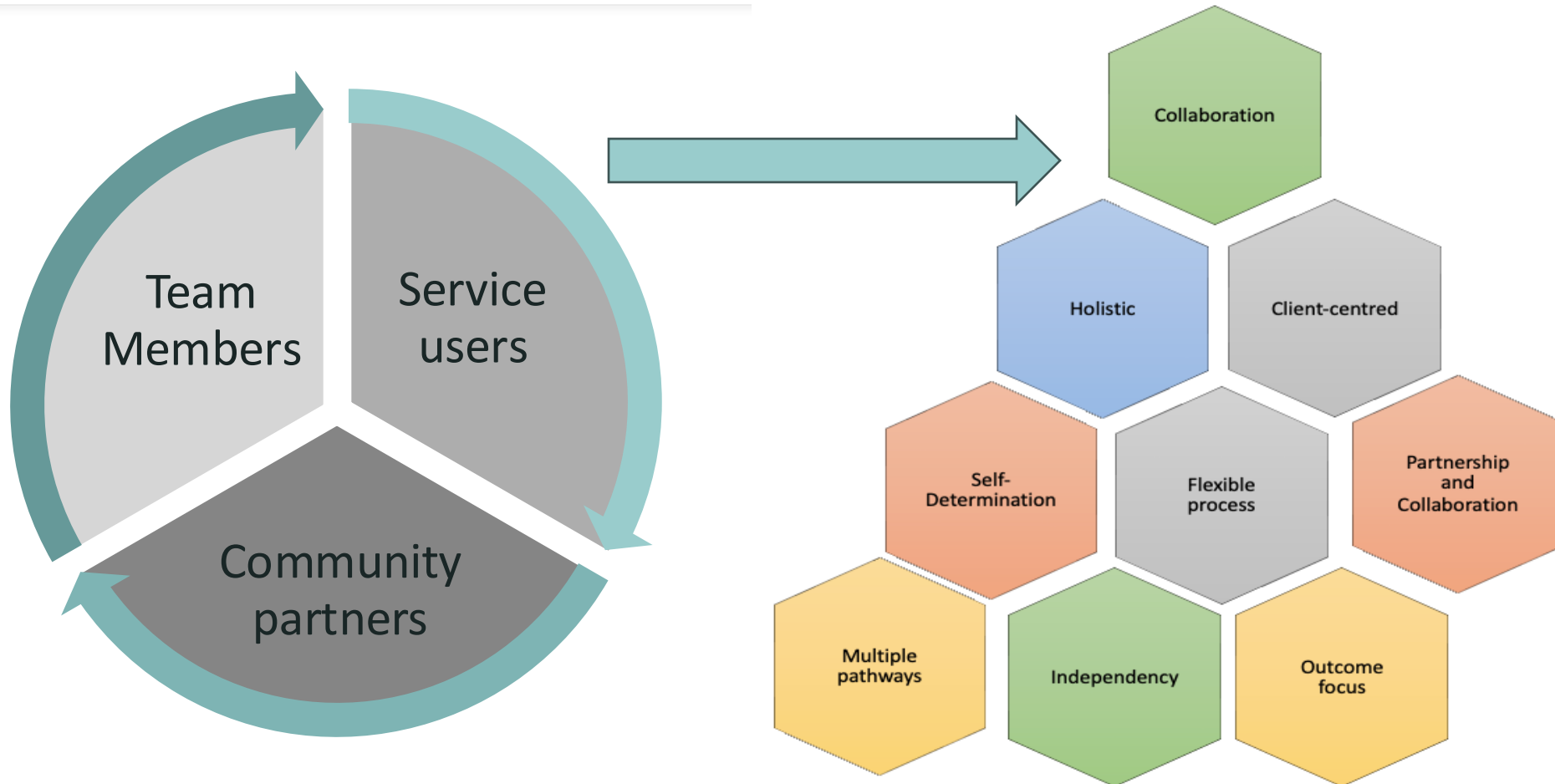
## Rigorous evaluation of service outcomes:

Current mechanisms lack scientific rigor across the sector to generate comparable data to demonstrate the usefulness of the case management service.

# Goal of Collaborative Case Management Model



# Principles of the Collaborative Case Management Model

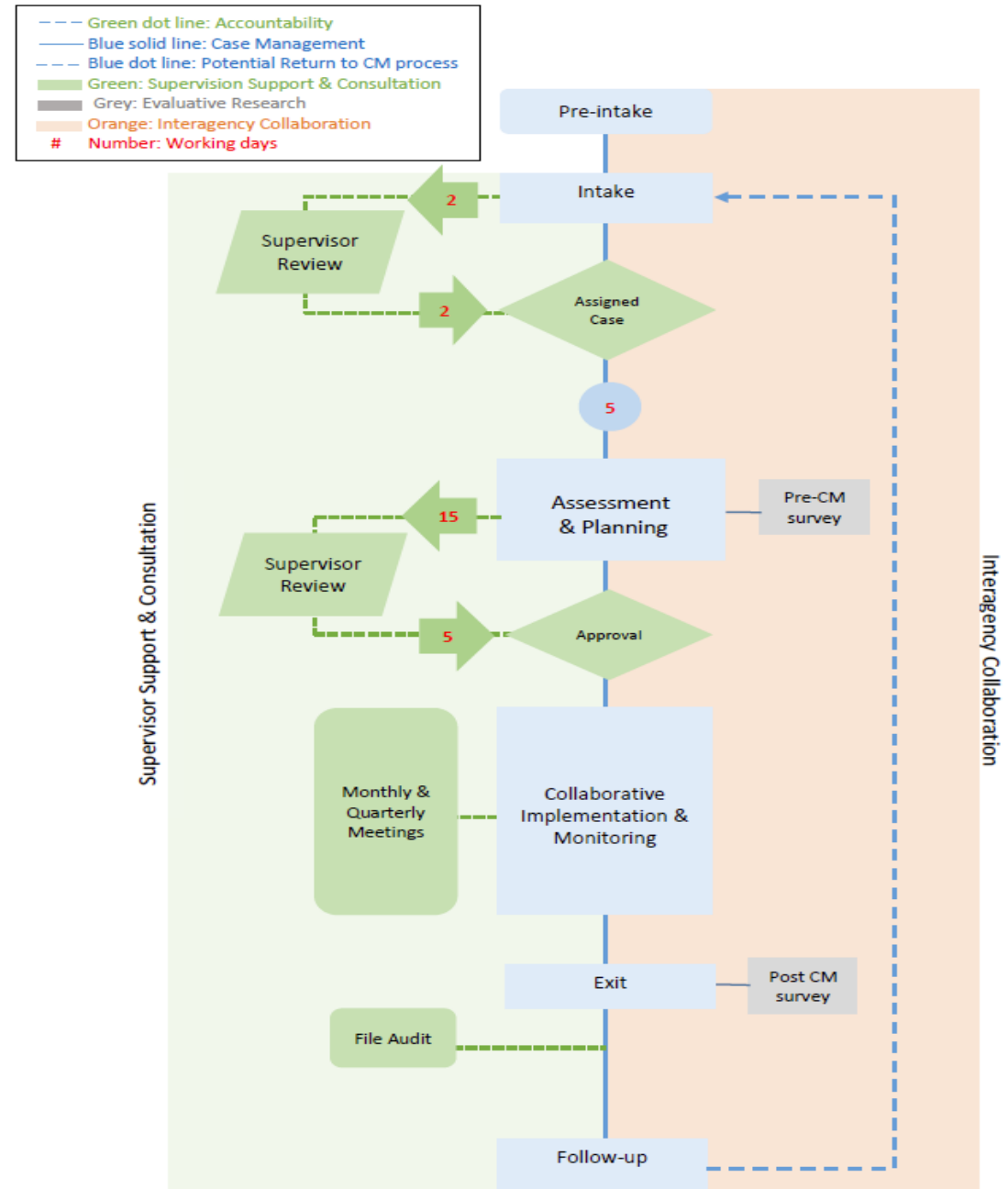




# Workflow of Collaborative Case Management Model

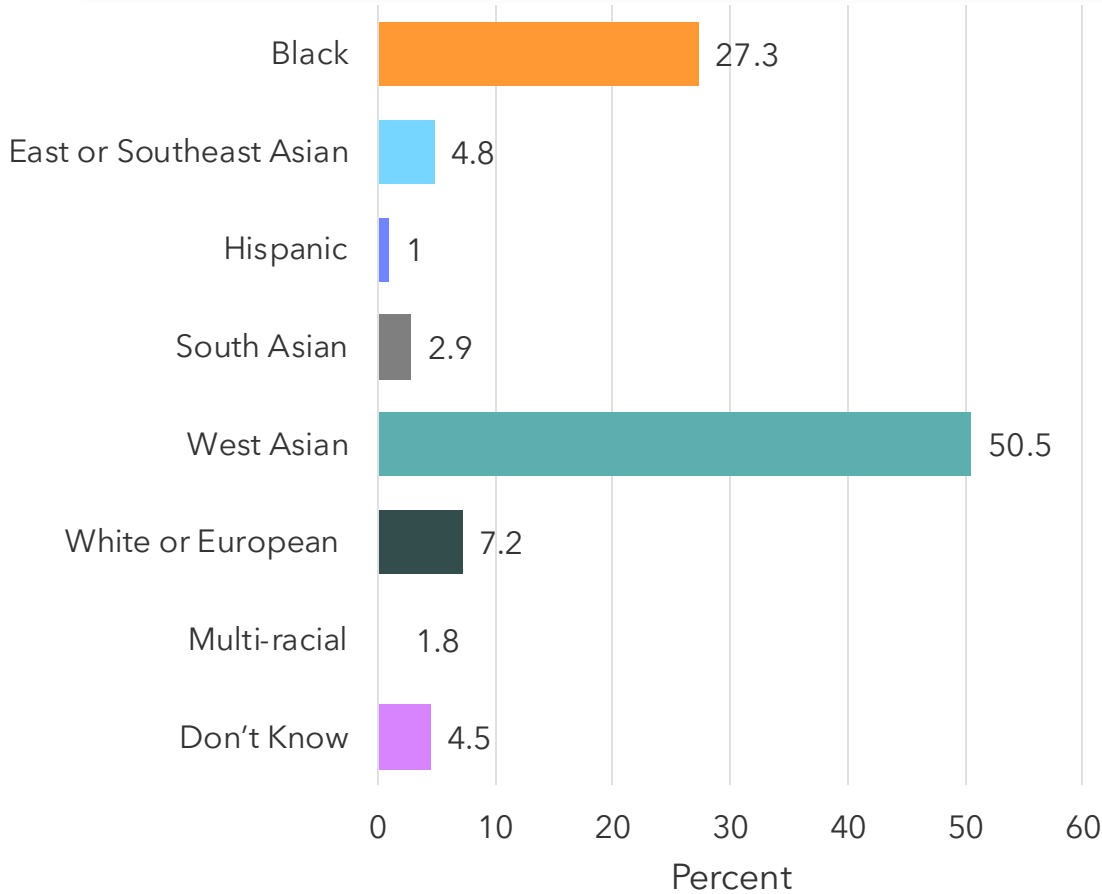
## Key New Components:

1. Pre-Intake orientation
  - minimize discrepancy in expectation
2. Family as intake unit
  - holistic perspective and support
3. Enhanced decision making and accountability
  - a) Clear pathway and workflow
  - b) Supervisory role/function and mechanism
  - c) Team support
4. Wrap-around support through inter-agency collaboration
5. Build-in outcome evaluation mechanism

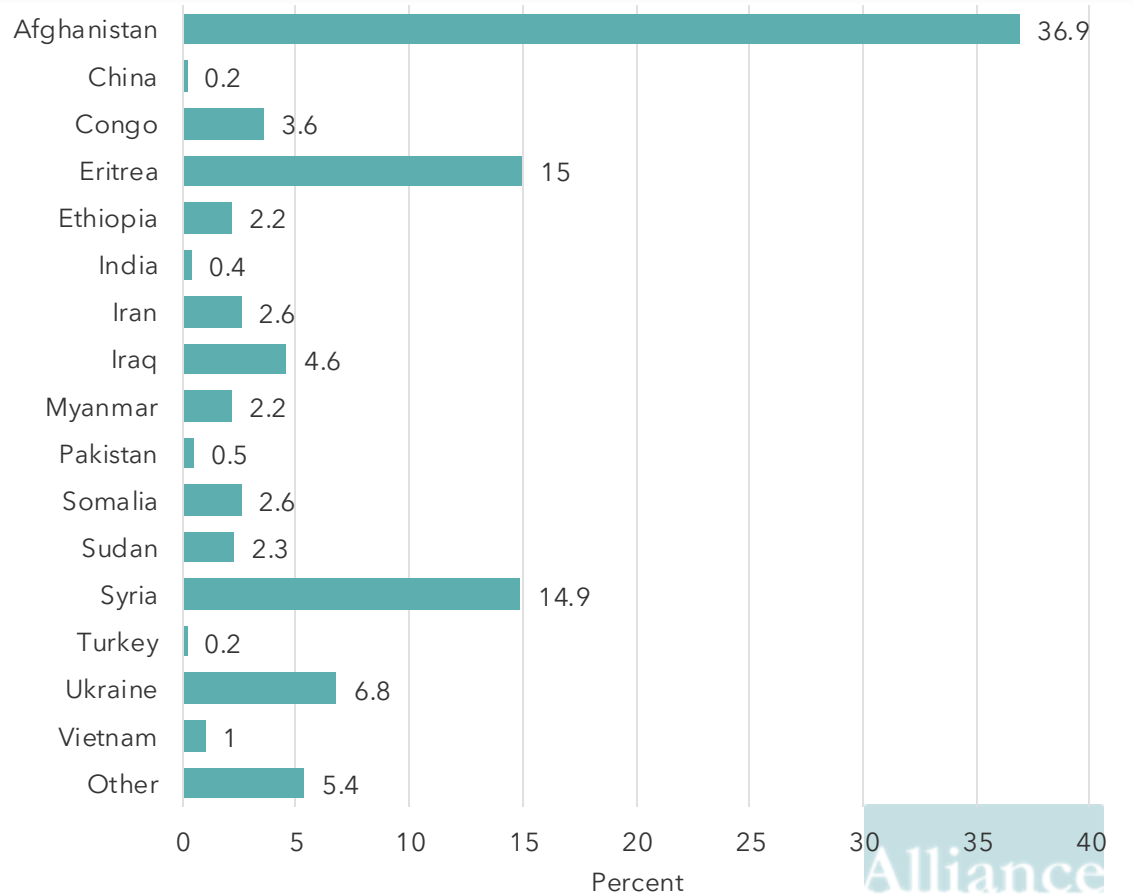


# Overview of Service Users

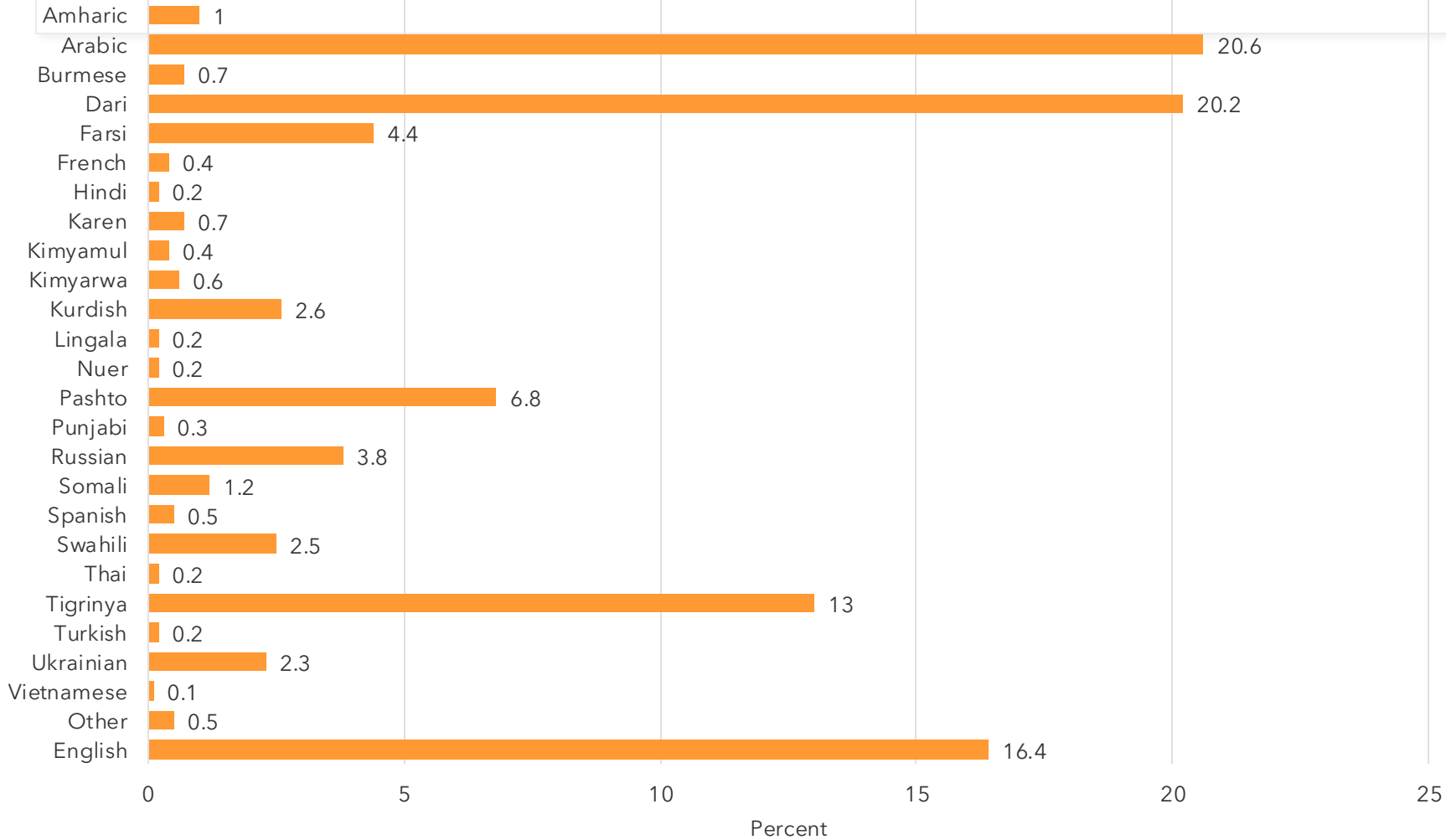
## Client Ethnicity



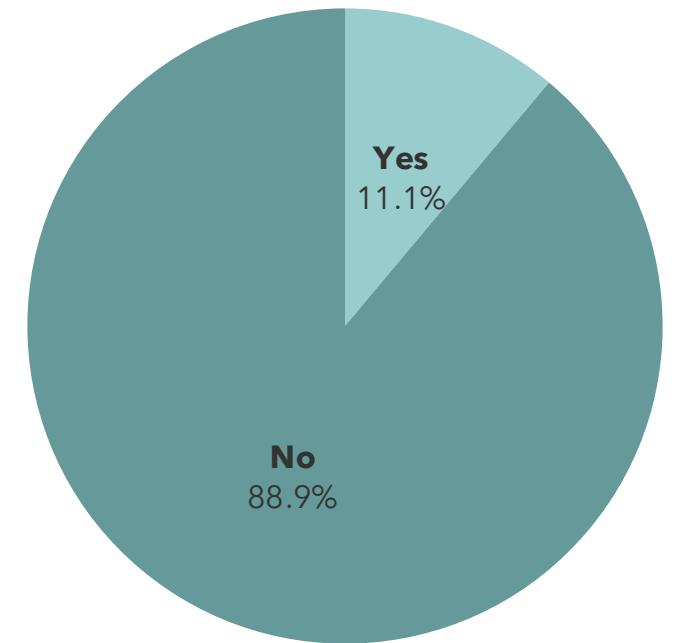
## Country of Origin



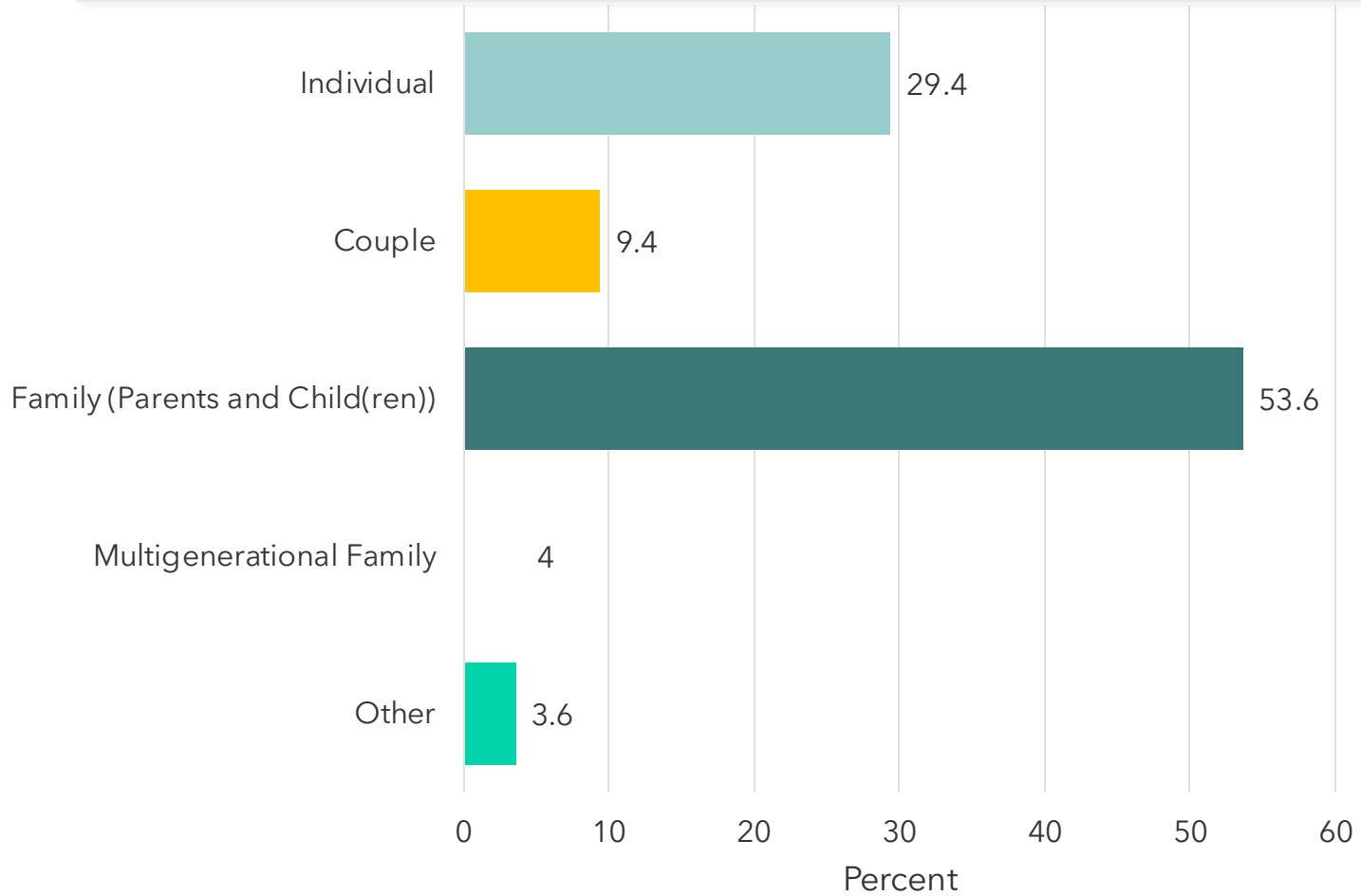
# Language Used in Case Management



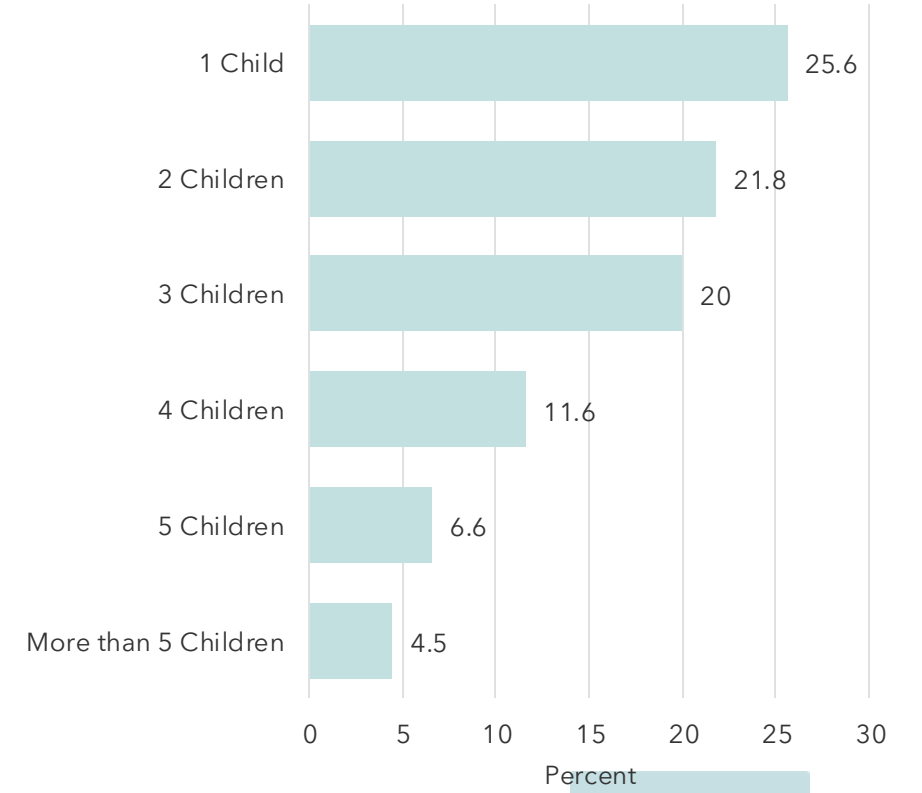
# Interpreter Used in Case Management



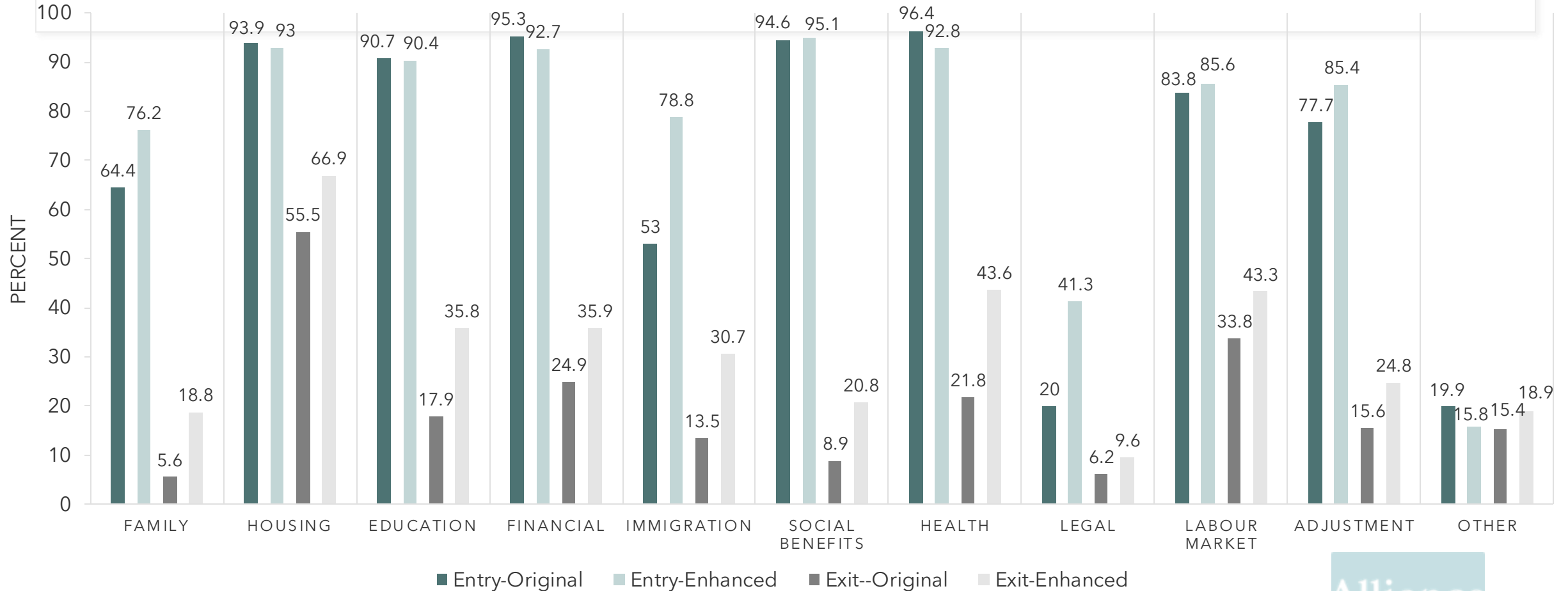
## Household Composition



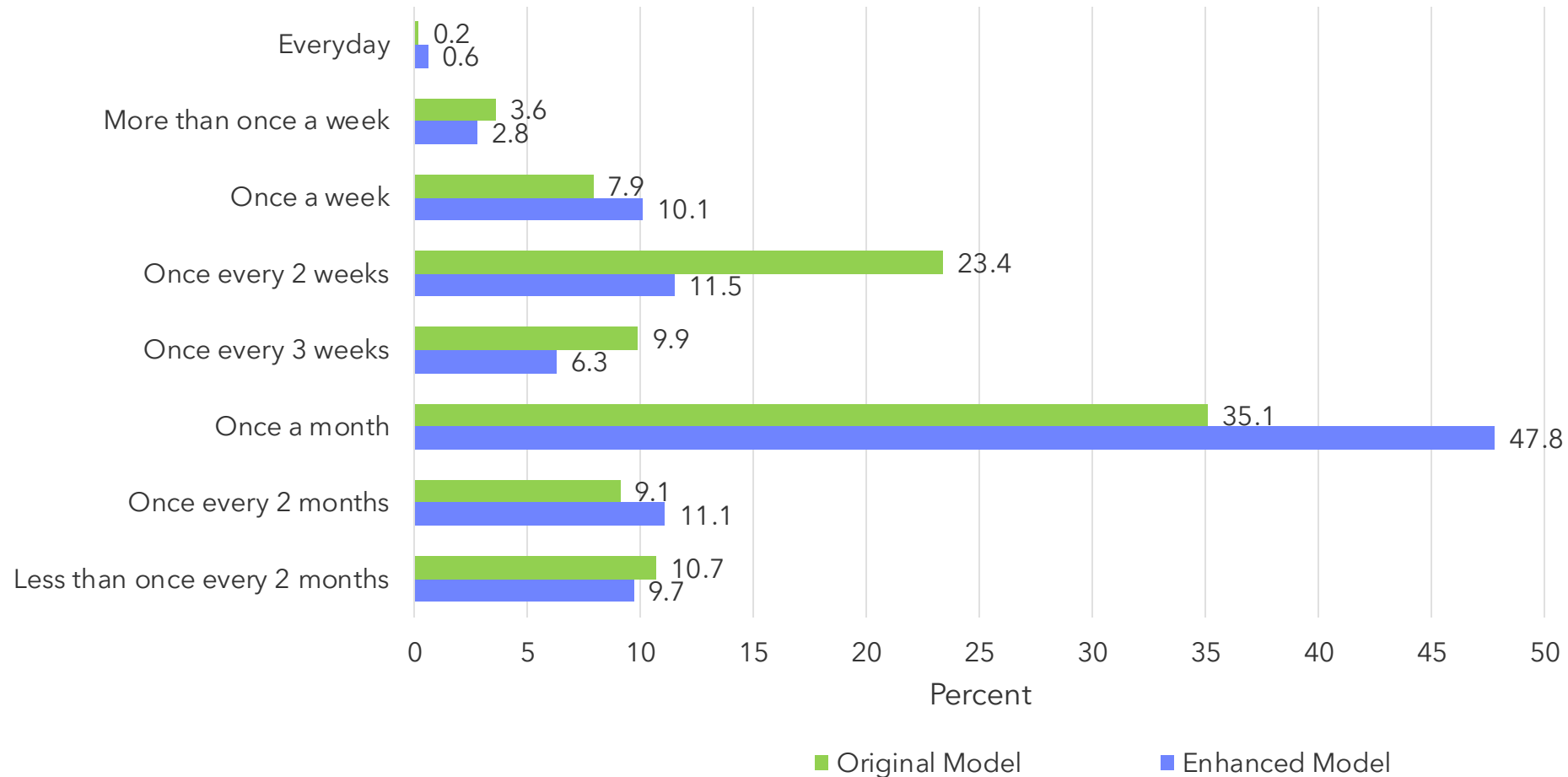
## Number of Children



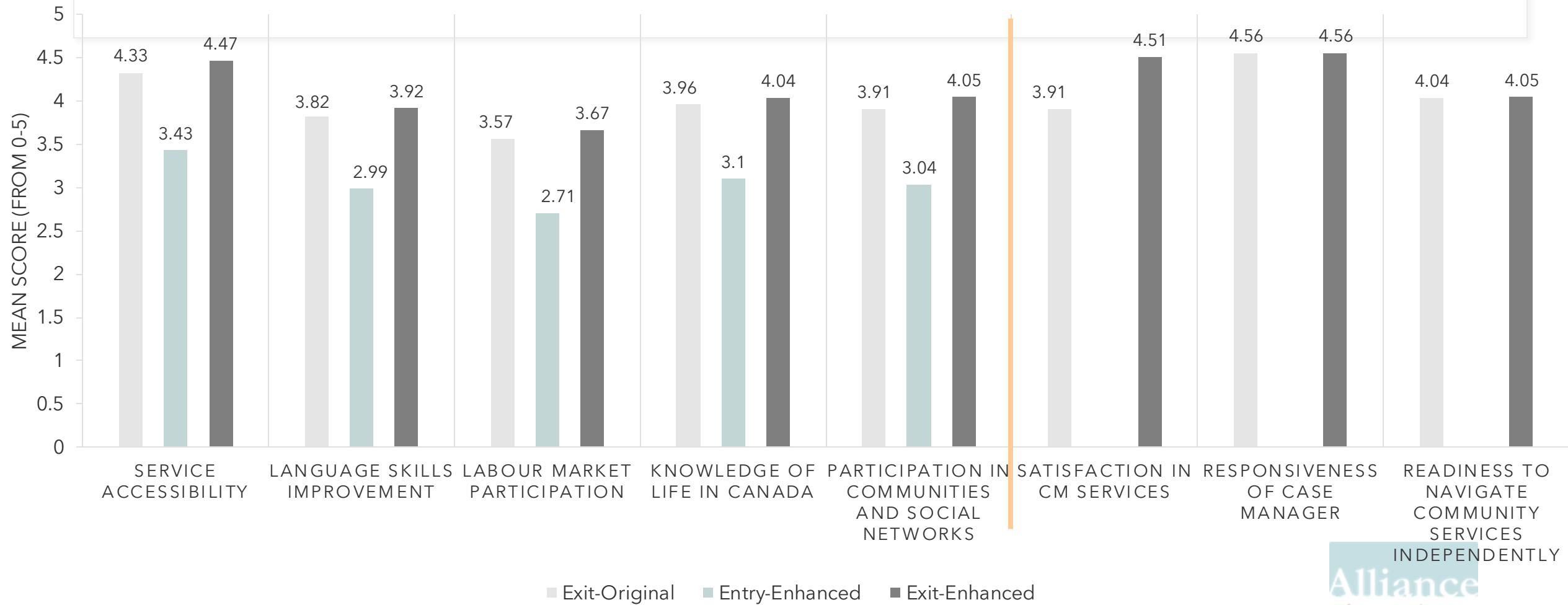
# Client Domains of Identified Need



# Case Supervision



# Client Satisfaction



# Client Reported Outcomes





# Client Perspective

- Overall, found CM was helpful in their and their family's initial settlement
- Specific supports that were helpful:
  - Helped fill out forms, update documentation, and information on the direction of different government programs and services that are eligible
  - Language-matched service was appreciated as translation of documents was crucial, particularly in the beginning
  - Accompaniment service with interpretation function was helpful, particularly in banking and medical service
- Case management service was not helpful in securing tangible resources such as affordability housing, medical services, and employment.
  - These are larger structural issues beyond the control of their case managers.

# Recommendations

- Scalability of this model:
  - Proven results, consistence and standardization for better service quality
- Program and funding model change
  - Family-as-an-unit intake
  - Workshops organizations and delivery
- Centralized documentation system
  - Efficient tracking and reporting - minimizing administrative burden
  - Transferability of information and minimize service duplication
- Improving working condition
  - Training to upgrade case managers skills and qualification
  - Reclassification of compensation for case managers
- More research

# Agencies' Perspectives

On the SDI

On the Alliance

## DIVERSEcity Community Resources Society

- **History:** The oldest settlement organization in Surrey, since 1978.
- **Agency:** 250+ employees.
- **Population:** 45% of Surrey's population are newcomers.
- **Alliance:** a member since 2019.



# SDI at DIVERSEcity

## Experience

- A mix of new RISE Case Specialist (RCS) & seasoned RCS.
- The mix of perspectives allowed for easy adaptation of the new model.
- Similar practices already in place (Family Unit & Case Notes).

## Implementation

- Use of Volunteers to implement the Client Surveys.
- Regular check ins divided between Manager and Program Coordinator to maximize staff time.

## Post SDI

- Development of post client surveys using the SDI's survey as a base.
- Continued regular and in-depth check ins.
- Development of Case Notes guide to standardize the process.

# Impact of The Alliance

- **Collaboration:** A place to share, learn, and collaborate with other agencies.
- **Innovations & Troubleshooting:** An opportunity to discuss success, setbacks, and problem solve together.
- **Support:** The UBC team's presence at the meetings provided support and direct contact to answer any questions.



# Central Vancouver Island Multicultural Society (CVIMS)

- Located on Vancouver Island, on the Traditional Territories of Snuneymuxw, Snaw-Naw-As and Stz'uminus First Nations.
- Nanaimo among the top 5 fastest-growing municipalities, according to the latest Census data
- CVIMS represents smaller and medium-sized communities
- Joined the Alliance in May 2022 (Executive/Senior Leadership), September 2022 (Frontline Staff)
- CVIMS was not part of the SDI research project



# Why CVIMS Joined?

- Concentration of resources remains in metropolitan areas
- Small and medium-sized communities lacking resources
- Limited professional development & networking opportunities
- CVIMS only settlement agency in Central Vancouver Island
- No standardized Case Management model/concept in the settlement sector
- More clients presenting higher complex of health and mental health issues





# Impact of Alliance on CVIMS



## Executive

- Able to discuss and advocate for change in identified areas with funders / partners
- Stronger voice, strategized response to requests from community partners, members, and front-line staff
- Unified and aligned practices, develop CM fundamental training for settlement sector

## Supervisors

- Constructive meetings with discussion on how agencies overcome challenges
- Streamlined processes, more consistency in service delivery
- Best practices and resource sharing

## Frontline

- Resource development and sharing highly effective
- More aligned best practices and processes
- Trainings useful and beneficial
- Mentorship practices

# Outcomes for CVIMS



Staff training provided by experienced Case Management service provider



Increased efficiency in service delivery



Access to Resources & Networking; Participation at CM Conference



Improved standardized processes



Increased satisfaction from clients, no waitlist

# Langley Community Services Society

- Joined in April 2023 after receiving two case managers from IRCC
- Bridged case management services in Metro Vancouver and Fraser Valley



# Significant Impacts

- Access to resources from previous training sessions
- Connections with partner agencies
- Established shared referral procedures
- Developed a custom Case Management Framework
- Implemented intake, assessment, and case documentation processes



# Results

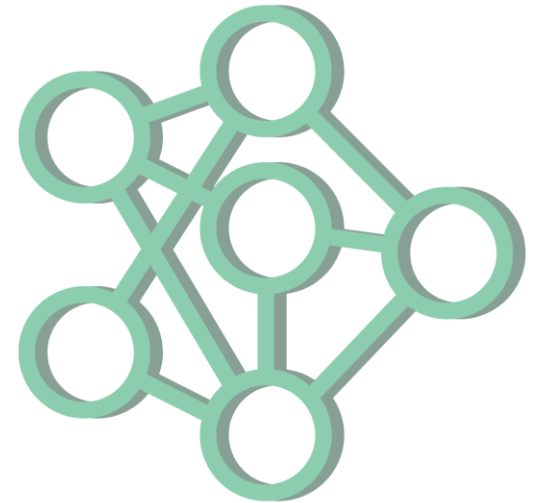
## Rapid Program Development



## Enhanced Staff Support



## Collaborative Leadership



# Thank You!

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Website:

