

## **CMSUK Participant Information Sheet**

### **An investigation to identify the need for a standardised, accredited or certified professional pathway for case managers in the UK.**

You are invited to take part in the above investigation, which is being carried out on behalf of the Case Management Society of the United Kingdom (CMSUK). This information is provided to enable you to decide whether or not to participate. Before you decide please take time to read it carefully and discuss it with others if you wish. Please ask if there is anything that is not clear or if you would like more advice. Contact details for further information are provided below.

#### **What is the aim of the investigation?**

The overall aim of this investigation is:

To identify to what extent there is a need for a standardised, accredited or certified professional pathway for case managers in the UK.

To achieve this, the investigation will meet the following objectives:

1. Explore the most feasible type/model of professional pathway for case managers.
2. Identify the constituent parts of such a pathway.
3. Explore options for implementation of such a pathway.
4. Clarify the type/level/content of an educational framework and what it could contribute to a professional pathway.
5. Provide evidence of the impact of implementing a professional pathway on individual case managers and case management in the UK.

#### **Who will conduct the investigation?**

The study will be conducted on behalf of CMSUK by Jane Goodman (Project Lead) and Susanna Robinson (Project Officer). The project will be supervised by Dr. Edgar Meyer on behalf of CMSUK. The CMSUK Standards, Research and Development Working Group will oversee the progress of the investigation.

#### **What is the background to this investigation?**

Within a burgeoning case management industry, which is currently lacking regulation, the Case Management Society UK (CMSUK) aims to assure quality and equity of service delivery by setting the highest benchmark of standards of practice and code of ethics. CMSUK is committed to promoting and fully supporting its members in achieving such standards of practice and in raising the debate about future professional recognition of case management. In order to actively progress the aims of the organisation, CMSUK have commissioned this investigation. This piece of work will therefore identify to what extent there is a need for professional standardisation, accreditation or certification that is underpinned by an educational framework, for case managers in the UK.

This investigation aims to address a gap in the evidence base with regard to professional recognition for case managers in the UK. Whilst there are several organisations supporting the professional practice and development of case managers in the UK, there is no formal professional pathway available at the present time. Within the confines of this investigation, a professional pathway could include a number of elements such as relevant type and years of experience, prior knowledge and qualifications, specific practice skills, personal attributes and qualities and a specific educational framework. The aim of a professional pathway would be to provide a consistent mechanism for determining and measuring a case manager's ability to take on this role and to meet standards of practice.

Currently case managers have a wide variety of professional backgrounds, skills and experience related to the client group with whom they work and the case management role. However, there is no formal, uniform mechanism for identifying and developing the case manager's specialist knowledge for responding to the different and complex needs presented by clients.

This has prompted debate in the field (and specifically within CMSUK) about whether there is a need for a professional pathway to address this gap in provision. If there is, further questions are raised about the most feasible model, its implementation and implications for the individual case manager, the wider case management industry and those commissioning case management services. This debate takes place against a background of varying definitions of case management and a wide range of professional backgrounds of individuals taking on case manager roles.

For the purposes of the study case management is defined as "...a collaborative process which: assesses, plans, implements, co-ordinates, monitors and evaluates the options and services required to meet an individual's health, social care, educational and employment needs, using communication and available resources to promote quality cost effective outcomes." (CMSUK 2011)

Full details of the project brief are attached to the covering email, which you have received.

### **Why have I been chosen?**

You have been chosen to participate in this investigation because you are either a provider or commissioner of case management services in the UK. We wish to seek the views of a wide range of stakeholders who have relevant and current experience of case management services.

### **What would I be asked to do if I took part?**

For the initial phase of the investigation we aim to survey all participants using an online questionnaire. You will be provided with a link to this questionnaire, which will include an integral consent process. The questionnaire should take about 10 minutes to complete. If you are willing to be involved in a focus group at a later stage of the investigation you will be asked to provide your name and contact email address.

In the second phase we would invite a sample of participants for participation in a focus group. This would be at a venue to be confirmed. Your formal consent will be sought again before the second phase of the study if you willing to participate.

If you are asked to participate in a focus group there will be between 6 and 9 other participants. The group will be tape recorded for ease of transcribing afterwards and a written record of the proceedings will be made. The focus group will be facilitated by one of the project team and a note taker will also be present. The group will be a mix of case managers and purchasers of case management services. You will be required to contribute your views on subjects relevant to addressing the investigation objectives. Some of these subjects will have been responses from the questionnaire phase of the study to be explored in more detail. The focus group will be approximately one hour in duration.

### **What happens to the data collected?**

The data collected from all of these sources will be used to provide evidence to meet the investigation objectives and will be subject to appropriate analysis. All data (hard copies and electronic) will be stored and disposed of securely in line with data protection legislation (1998) and Privacy and Electronic Communications Regulations (2003). It will be held for the required period of time under these regulations. Only aggregate data will be used to inform the investigation and individual anonymity will be protected; no unique identifiers will be used in any

dissemination of results. Only the chief investigators in the investigation will have access to this data.

Professional standards including confidentiality will be maintained throughout the investigation.

### **Will the outcomes of the investigation be published?**

Aggregate data will be published in various formats as the investigation progresses as follows:

- Progress reports and final report to the CMSUK Education Sub Group of The Standards, Research and Development Working Group
- Interim results presented at CMSUK conference in November 2011
- Article/s to be published in relevant professional journals at the end of the investigation

### **What happens if I do not want to take part or if I change my mind?**

It is up to you to decide whether or not to take part and if you do you are still free to withdraw at any time without giving a reason and without detriment to yourself or your organisation. A consent process is an integral part of the questionnaire and focus group.

If you agree to participate in a focus group but later change your mind you are still free to withdraw without penalty.

### **Will I be paid for participating in this investigation?**

There is no payment for participation in this investigation however; reimbursement of travel costs will be made for those attending the focus groups.

### **Contact for further information**

For further information please contact:

#### **Project Lead**

Jane Goodman, Training Manager, Harrison Training, The Old Brewery, Newtown, Bradford on Avon, Wiltshire BA1 1NF

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01225 309333

### **References**

European Community (2003) The Privacy and Electronic Communications (EC Directive) Regulations Available at: <http://www.legislation.gov.uk/uksi/2003/2426/introduction/made> Accessed on 20.5.11

United Kingdom Government (1998) The Data Protection Act Available at: <http://www.legislation.gov.uk/ukpga/1998/29/contents> Accessed on: 20.5.11