

## COLLABORATIVE DEFENSE TOOLKIT

# Case Management Handbook

With the advent of collaborative staff roles, it is critical that defense agencies supplement training and onboarding with comprehensive resources that address the ins and outs of these positions. As support staff navigate an unfamiliar landscape and trailblaze these new positions, tangible tools to support their transition into the defense team will streamline client service delivery.

## Overview

This Case Management Handbook was specifically designed to enumerate best practices and provide examples to support staff for how to assist clients and properly manage the demands of their caseload. This guide provides an overview of the typical day-to-day expectations, anticipated client needs, and client interactions. While not all encompassing, this guide sets the framework for expectations and supplies tools for intake, referrals, organization, and optimizing positive client relationships and case outcomes.

## Tools for Collaborative Defense

The handbook, notably, illustrates how staff conduct can embody the core tenets of Collaborative Defense. As a member of the defense team, support staff are tasked with using the office's vision to empower clients, ask the right questions, connect clients to services, and access legal expertise beyond the public defender. Establishing productive, trusting relationships with clients forms the groundwork for client-led defense practice. Additionally, an effective intake process that inquires about meaningful, relevant information allows for staff members to better understand client service priorities and identify optimal providers. The identification of mechanisms that improve client service delivery make the adoption of collaborative practice easily accessible to new staff, thereby facilitating its integration into the daily practice of public defender offices.

## **Making It Your Own**

As each support staff position is specific to the jurisdiction that they serve, this guide should be adapted to reflect the protocols and procedures of the office in which these staff members operate. For example, the respective intake and referral forms for the locality served should be added to this handbook so that staff are clear on those protocols' specific application in their office. This should also be considered for the case management system and case closure protocols. Nevertheless, many support staff positions are based on the same core responsibilities and this handbook aims to address and resolve common concerns that arise for these employees as they join the defense team.