



# **Social Services Management: Case Management, Supervision and Programme Evaluation**



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### **Introduction:**

Social services managers are expected to run fair access, safe casework and measurable results with stretched teams, yet many units still work from unclear eligibility rules, informal referral routes, uneven caseload supervision and evaluation that counts contacts rather than change for families. This Core Concept course equips managers and supervisors to organise social services management around a clear case management cycle, sound practice standards and practical programme evaluation. Participants review real case files, referral data and cost figures, and leave with a Service Improvement and Evaluation Plan for a social service programme.

### **Course Objectives:**

- Organise a social service around defined service models, rights-based and strengths-based practice and written service standards
- Set eligibility, intake and referral rules and run the case management cycle from assessment to closure
- Supervise caseloads and social work staff using structured allocation, reflective supervision and wellbeing checks
- Plan services from needs evidence and design programmes with a theory of change, logic model and results indicators
- Choose process, outcome or impact evaluation designs and calculate cost per outcome for value for money decisions
- Produce a Service Improvement and Evaluation Plan ready for board and funder review

### **Target Audience:**

- Managers who head social care, family support or welfare service units
  - Supervisors who allocate caseloads and oversee the practice of social workers and counsellors
  - Programme managers who design and run social development and guidance programmes
  - Quality and performance leads who monitor service standards and beneficiary outcomes
  - Grant and partnership managers in charities and foundations who fund or commission social services
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## **Course Outline:**

### **Day 1: Social Services System, Service Models and Practice Principles**

- Social Protection, Social Care and Community Services Landscape Map
- Case Management Service Models: Broker, Clinical, Strengths-Based and Rehabilitation
- Rights-Based Practice Principles: Dignity, Participation and Advocacy
- Strengths-Based Assessment and Client Self-Reliance Planning
- Service User Journey Map From First Contact to Case Closure

### **Day 2: Service Standards, Eligibility and Access Pathways**

- Social Service Standards Framework: Access, Assessment, Care Planning and Review
- Service Quality Audit Checklist for Social Care Units
- Eligibility Criteria Matrix and Priority Banding Rules
- Intake Screening Form and First-Contact Triage Protocol
- Inter-Agency Referral Pathway and Referral Acknowledgement Protocol

### **Day 3: Case Management Process, Counselling and Safeguarding Policy**

- Case Management Cycle: Identification, Assessment, Care Planning, Monitoring, Review and Closure
- Biopsychosocial Assessment Template and Individual Care Plan
- Social and Career Counselling Function and Guidance Session Structure
- Safeguarding Policy Framework: Risk Indicators, Escalation Routes and Designated Leads
- Case Closure Criteria and Aftercare Follow-Up Protocol

### **Day 4: Caseload Supervision, Workforce Wellbeing and Digital Case Records**

- Caseload Weighting Tool and Allocation Meeting Format
- Reflective Supervision Model: Managerial, Educational and Supportive Functions
- Social Worker Wellbeing: Secondary Trauma and Burnout Risk Checklist
- Digital Case Record Structure, Case Note Standards and Audit Trail
- Beneficiary Data Protection: Consent, Access Controls and Information Sharing Agreements

### **Day 5: Week-One Integration Case: Family Support Service Review**

- Family Support Unit Case Briefing: Caseload, Referral and Waiting-List Data
  - Intake-to-Closure File Audit on Sampled Case Records
  - Referral Pathway Bottleneck Analysis and Redesign Options
  - Supervision and Caseload Gap Findings Memo
  - Week-One Service Review Presentation and Peer Challenge
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## **Day 6: Needs Assessment, Service Planning and Programme Design**

- Population Needs Assessment Using Service Demand and Waiting-List Data
- Service Planning Matrix: Priority Groups, Capacity and Service Mix
- Theory of Change for a Social Service Programme: Pathways and Assumptions
- Logic Model: Resources, Activities, Outputs and Short- and Long-Term Outcomes
- Service Specification Document With Volumes and Quality Requirements

## **Day 7: Practice Governance, Programme Risk and Beneficiary Voice**

- Programme Risk Register: Safeguarding, Capacity and Continuity Risks
- Practice Governance Group Terms of Reference and Case Review Cycle
- Beneficiary Feedback Mechanism: Service Surveys, Exit Interviews and User Panels
- Complaints Handling Procedure: Stages, Response Times and Learning Log
- Serious Case Learning Review Method and Action Tracker

## **Day 8: Partnerships, Commissioning and Reporting to Boards and Funders**

- Partner Mapping for Referral Networks and Co-Located Services
- Commissioning Cycle: Analyse, Plan, Procure and Review
- Service Level Agreement and Grant Agreement Performance Clauses
- Memorandum of Understanding for Inter-Agency Case Coordination
- Board and Funder Reporting Pack: Narrative, Data and Exceptions

## **Day 9: Results Indicators, Monitoring Systems and Evaluation Economics**

- Results Indicator Set: Access, Timeliness, Practice Quality and Family Outcomes
- Monitoring System Design: Data Flows, Service Dashboards and Review Meetings
- Evaluation Design Choice: Process, Outcome and Impact Evaluation at Management Level
- Cost per Case and Cost per Outcome Calculation Worksheet
- Value for Money Review Using Efficiency and Cost-Effectiveness Comparisons

## **Day 10: Capstone: Service Improvement and Evaluation Plan**

- Case Social Service Programme Briefing and Evidence Pack Review
  - Service Improvement Priorities and Redesign Options Appraisal
  - Evaluation Plan Drafting: Questions, Indicators, Data Sources and Schedule
  - Service Improvement and Evaluation Plan Board Summary
  - Plan Presentation, Panel Challenge and Action Commitments
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## **Skills You Will Gain:**

- Social Service Design
- Eligibility and Referral Management
- Casework Oversight
- Reflective Staff Supervision
- Safeguarding Escalation
- Social Needs Analysis
- Programme Evaluation Design
- Unit Cost Analysis

## **Why Attend This Course:**

- Return with a Service Improvement and Evaluation Plan built on a case social service programme and tested by peers
- Replace informal intake and referral habits with written eligibility rules, triage steps and referral routes your team can follow
- Show boards and funders what a service achieves for families and what each outcome costs
- Compare social service practice with managers from public agencies, charities and foundations in other countries

## **Conclusion:**

Social services earn trust when people reach the right help quickly, casework is supervised and safe, and managers can show what changed and at what cost. Week one builds the service itself: models, standards, access, the case management cycle, supervision and records. Week two adds needs-led planning, programme logic, governance, beneficiary voice, commissioning, indicators and evaluation economics. The final day produces a Service Improvement and Evaluation Plan that participants take back to guide the next review of their service.