

<b>Title</b>	<b>Engage in improving case management performance through coaching, training, guidance, and support</b>		
<b>Level</b>	<b>6</b>	<b>Credits</b>	<b>7</b>

<b>Purpose</b>	<p>This unit standard is intended for people who work in leadership case management roles in the public or private sectors.</p> <p>People credited with this unit standard are able to:</p> <ul style="list-style-type: none"> <li>– coach and help train others in the case management context; and</li> <li>– provide ongoing guidance and support to case managers.</li> </ul>
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<b>Classification</b>	Public Sector Services > Case Management
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<b>Available grade</b>	Achieved
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### Guidance Information

- 1 Legislation and obligations  
Health and Safety at Work Act 2015;  
Human Rights Act 1993;  
New Zealand Bill of Rights Act 1990;  
Official Information Act 1982;  
Privacy Act 1993;  
Treaty of Waitangi/Te Tiriti o Waitangi;  
Specific legislation applicable to a particular situation (e.g. Employment Relations Act 2000, Residential Tenancies Act 1986, Contract and Commercial Law Act 2017, Resource Management Act 1991);  
and all subsequent amendments and replacements.
- 2 Although this unit standard is classified in the *Case Management* domain within the *Public Sector Services* subfield, it is written so it can also be applied to non- public sector organisations as well as those within the public sector. Examples of such non- public sector organisations are insurance companies and third-party providers, health service providers, and rehabilitation service providers.
- 3 Demonstration of knowledge and skills must be consistent with any applicable code or codes of conduct such as the New Zealand State Services Code of Conduct, Standards of Integrity and Conduct (available from <http://www.ssc.govt.nz>) and/or any other organisation or sector specific code or codes of conduct and/or ethics, and must reflect operating professionally and ethically in New Zealand's diverse, bi-, and multicultural environment.
- 4 Evidence for assessment must be based on workplace performance.

## 5 Definitions

*Case management* is a collaborative process of assessment, planning, facilitation, and advocacy of options and services to meet an individual's holistic needs through communication and available resources to promote quality cost-effective outcomes.

*Learners*, for the purpose of this unit standard, may refer to less experienced and experienced case managers or other staff and managers in the organisation.

*Organisational requirements* refer to instructions to staff on policies, procedures, and methodologies which are documented and are available in the workplace.

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## Outcomes and performance criteria

### Outcome 1

Coach and help train others in the case management context.

#### Performance criteria

1.1 Consult and engage with relevant parties to identify coaching and training goals for learners and to plan and/or select ways these goals can best be met.

Range relevant parties may include but are not limited to – learners, experienced case managers, potential buddies, line managers, subject matter experts, learning and development personnel, business development managers.

1.2 Plan and prepare to participate in direct coaching and training roles within areas of development for individuals and/or teams.

Range must include – resources and tools, communication and logistics; may include – cultural safety and inclusivity considerations for learners.

1.3 Provide the coaching and training, making modifications as required to maximise progress.

1.4 Reflect on the effectiveness of the training and coaching.

Range learner feedback, self-reflection.

1.5 Report and communicate progress and evaluation outcomes to relevant parties in accordance with organisational requirements.

Range relevant parties may include but are not limited to – learners, line managers, subject matter experts, learning and development personnel.

### Outcome 2

Provide ongoing guidance and support to case managers.

**Performance criteria**

- 2.1 Guide and support the case manager in accordance with their need and with organisational requirements.
- Range may include but is not limited to – instructional, workshopped, collaborative, developmental, coaching conversations, informal.
- 2.2 Model and encourage active listening and openness throughout exchanges.

**This unit standard is expiring. Assessment against the standard must take place by the last date for assessment set out below.**

**Status information and last date for assessment for superseded versions**

Process	Version	Date	Last Date for Assessment
Registration	1	1 March 2018	31 December 2024
Review	2	27 October 2022	31 December 2024

**Consent and Moderation Requirements (CMR) reference**

0121

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.