

EAB Tool: Key Considerations for a Student Affairs Case Manager Role

Overview:

The Student Affairs Forum's research illustrates how BITs are increasingly handling more complex cases, such as students unwilling to seek help or individuals with long-term or chronic issues. Although small in number, these cases can be resource intensive, taking up an inordinate share of the team's time and mindshare. Some innovative institutions are recognizing that the BIT as a whole is not the right solution to coordinate and manage the long-term follow-up. As such, some universities are creating dedicated case manager roles to help coordinate cross-functional responses and provide a more regular touchpoint for high-need students.

The Forum's work surfaced a variety of models for case management on campus. For those institutions considering establishing a case manager role, the Forum has outlined some key considerations below including reporting structure, duties, and funding.

Reporting Structure

Key Questions

- Where should the case manager report?
- Should the role have a dotted reporting line to another unit (such as Counseling)?
- Should the case manager be physically located in the Dean of Students Office, Judicial Affairs, or in the Counseling Center?
- Do we want to develop a dedicated office for Student Assistance that also houses the case manager?

EAB Advice

The Forum strongly recommends creating a case manager position within the Dean of Students office. This role is designed to interface with students in an administrative capacity, rather than in a therapeutic role. The case manager should report directly to either the Dean of Students or an Associate/Assistant Dean. While it is important for the case manager to have a good relationship with professionals in the Counseling Center and Student Health, we do not recommend a dotted reporting line to those units.

Educational Background and Experience

Key Questions

- What educational backgrounds contribute to success as a student affairs case manager?
- What experiences should we look for in candidates?
- What are the key skills needed for this role?

EAB Advice

Typical educational backgrounds for case managers include degrees in social work or counseling. At some institutions, experience in residential life or another student-facing unit was seen as a plus when evaluating candidates.

The Forum recommends that institutions be explicit in the hiring announcement and job description as to the role expectations and the relationship with students. Several interviewees noted that if a case manager has a social work or counseling background, this individual may feel restricted by his or her licensure to maintain confidentiality with students. Therefore, it is very important that the case manager's job description clearly states that interactions with students in their official capacity are not therapeutic in nature.

Position Duties

Key Questions

- What duties will the case manager perform?
- What role will the case manager play on the behavioral intervention team?
- Will the case manager be responsible for overseeing all student of concern cases?

EAB Advice

Common duties for the case manager role may include some of the following items:

- Coordinating services for students of concern
- Following up with students under review by the behavioral intervention team
- Conducting outreach and education to students, faculty, and staff about referring students of concern
- Liaising with parents when parental notification becomes necessary to resolve a case
- Maintaining behavioral intervention team records
- Coordinating data collection and assessment related to behavioral intervention team activities
- Maintaining personal case management records for students of concern who are not referred to the behavioral intervention team
- Referring students of concern to appropriate offices on campus

Although BITs are structured differently across institutions, the Forum recommends that the case manager serve as a member or a convener of the team but not as the group's chair. We believe that serving as the BIT chair and the case manager simultaneously has the potential to create a conflict of interest. To improve efficiency and work process, the Forum suggests BITs should have a clear separation between the case manager and chair roles.

Funding

Key Questions

- What is a competitive salary for a case manager?
- Do we have the funds to make this a permanent position?
- Do we have funds for professional development activities for the case manager? If not, how will we support the case manager's professional growth and keep him or her engaged as a member of our staff?

EAB Advice

A Student Affairs Forum review of publicly available salary information reveals that salaries for case managers range between \$42,000 and \$55,000 (USD). The review focused on public institutions as private institutions do not regularly make employee compensation available to the public.

For some institutions, adding a full-time case manager position right away is not an option. Forum work illustrated how some institutions found it valuable to test whether or not their case manager has enough work to merit an FTE. These institutions either funded a ten month pilot to test demand or started by creating a half-time role. In most cases, these institutions usually found that the case manager position had more than enough demand to merit a full-time position.

Performance Evaluation

Key Questions

- How can we track the case manager's workload across a term?
- How can we prevent case manager burnout?
- What are some ways to assess the case manager's performance?

EAB Advice

Forum research showed that it is easy for the case manager to become a catchall for all student problems. To help combat this issue, the University of Miami has created a monthly case management report that outlines all activities conducted by the case manager. Items tracked in the document include professional development activities, meetings with students, outreach efforts, interactions with the Student Assessment Committee, and types of communication with students, among other activities. The monthly report helps the Dean of Students understand if the case manager is becoming overwhelmed and needs additional support. Having this information can also help the Dean of Students identify professional development opportunities for the case manager.