



**NewBridge Madison, Inc.**  
1625 Northport Dr. #125, Madison, WI 53704  
5724 Raymond Rd. Madison, WI 53711

*"Our mission is to provide older adults a bridge to successful aging."*

## **Case Manager**

### **Case Management Overview**

Case Managers are responsible for performing a comprehensive assessment of the client's needs, developing an individual service plan for each client, and linking the client to systems that provide needed advocacy services, resources, and opportunities.

Client-centered case management is based on a trusting and empowering relationship between Case Manager and client. Understanding this relationship is essential to facilitate a client's use of services along a continuum of care, and to restore or maintain their independent functioning.

Case managers will work to authentically dismantle the inequities that our clients face. Case managers will provide equitable access to resources and services for all clients.

### **Comprehensive Assessments Duties:**

- Implement case management standards and administer all case management functions in accordance with the policies and procedures of NewBridge.
- Complete a social history and a thorough assessment of a client's needs and characteristics through interviews with the client, family, friends, advocates and service professionals.
- Gather information and summarize all previous assessments of a client's strengths and needs.
- The assessment process includes noting the client's existing capacities, personal preferences, cultural preferences, potential natural supports, present services, and need for further services and supports.

### **Plan Development Duties:**

- Assist clients with identifying their goals.
- Use the goals to develop a client-centered case management service plan, with racial and cultural literacy, that will be used to direct service and resource coordination.

### **Coordination and Arranging of Services:**

- Implement the client-centered service plan by:
  - Exploring and identifying available resources (natural supports, local services, and appropriate programs.)
  - Determining eligibility for any applicable programs/resources that would benefit clients.

- Helping clients understand and support the service plan that is developed to meet their goals.
- Placing the clients name on appropriate waiting lists as needed and monitor.
- Encouraging clients to independently access resources and provide additional assistance, as needed.
- Providing advocacy on behalf of clients as needed.

### **Other Case Manager Duties:**

- Conduct community outreach at various locations to include older adult housing complexes, local service agencies, and congregate meals sites.
  - Case Managers are available to meet with potential clients to provide resource information and/or encourage them to request case management services.

## **Employment Qualifications:**

### **Education and/or Experience**

- Associate, Bachelor's or Master's Degree in Human Services or related field OR equivalent experience.

### **Other Requirements**

- Valid Driver's License and acceptable driving record
- Automobile Insurance
- Access to a reliable personal vehicle for traveling to home visits/meal sites/meetings around Dane County.
- Ability to work with older adults in an unprejudiced, unbiased, and understanding manner.
- Acknowledge and respect the intersectionality of identities of older adults.
- Knowledge of community resources that may be used by clients.
- Strong organizational skills.
- Ability to manage complex situations.
- Possess good verbal and writing skills.
- Proficient computer skills with knowledge of Google Workspace and Microsoft products.
- Ability to learn/use the NewBridge Database system.
- Criminal/Caregiver/Credit screening

\_\_\_\_\_  
Staff Signature

\_\_\_\_\_  
Date

***NewBridge intentionally values and promotes diversity, equity, inclusion and anti-racism in serving older adults.***