

# Campus Case Management

## Basic Needs: Supporting Students Across Needs, Systems, and Departments

Practical training for coordinated student support

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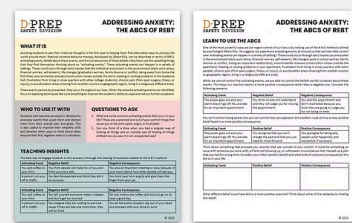




## Helping Students Thrive: Meeting Basic Needs

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If this is not the correct account, please return to your [Trek page](#).



**Addressing Anxiety: The ABCs of REBT.** Assisting students in recognizing their irrational thoughts is the first step in helping them find alternative ways to process the world around them.

[www.trainingoutpost.com/trek](http://www.trainingoutpost.com/trek)







# Today's Outline



**InterACTT**  
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- ✓ Case management basics
- ✓ Student needs and referral areas
- ✓ Role boundaries and escalation
- ✓ Program models on campus
- ✓ Scenario-based planning

# Learning Outcomes



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- 1 Describe campus case management.
- 2 Identify common student support needs.
- 3 Distinguish case management from adjacent roles.
- 4 Compare campus program models.
- 5 Map a basic support plan.



# Role & Scope





# What is case management?



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# What is case management?



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“Higher Education Case Managers serve their university and individual students by coordinating prevention, intervention, and support efforts across campus and community system to assist at risk students and students facing crises, life traumas, and other barriers that impede success.”

- HECMA, 2013

# What is case management?



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Both a philosophy and, often, a position on campus, case management helps individuals overcome obstacles that prevent them from reaching their academic, personal, social, intellectual, spiritual, relational, or career goals. Case management exists within each team member's work with students and, in a more formalized manner, as a separate department with its own intake process and approach to providing care.

Whether as part of the team or within the case management department, the focus is on helping students overcome obstacles they encounter in their academic pursuits. Case managers help improve communication among those involved in the student's success and identify solutions to overcome barriers or obstacles the student faces when following through with their existing goals.

- DPrep Standard 26



# What is case management?



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# What is case management?



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## EQUALITY VERSUS EQUITY



In the first image, it is assumed that everyone will benefit from the same supports. They are being treated equally.



In the second image, individuals are given different supports to make it possible for them to have equal access to the game. They are being treated equitably.



In the third image, all three can see the game without any supports or accommodations because the cause of the inequity was addressed. The systemic barrier has been removed.



# What is case management?



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A coordinated support process that helps students:

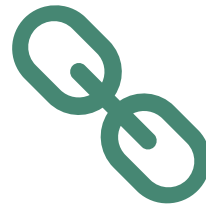
**Identify**  
Barriers



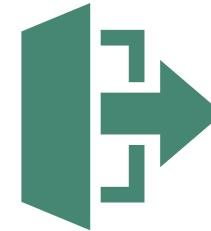
**Build**  
A plan



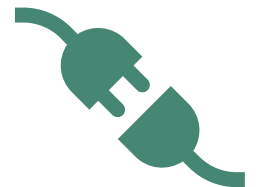
**Connect**  
To resources



**Follow**  
Through



**Stay**  
Engaged

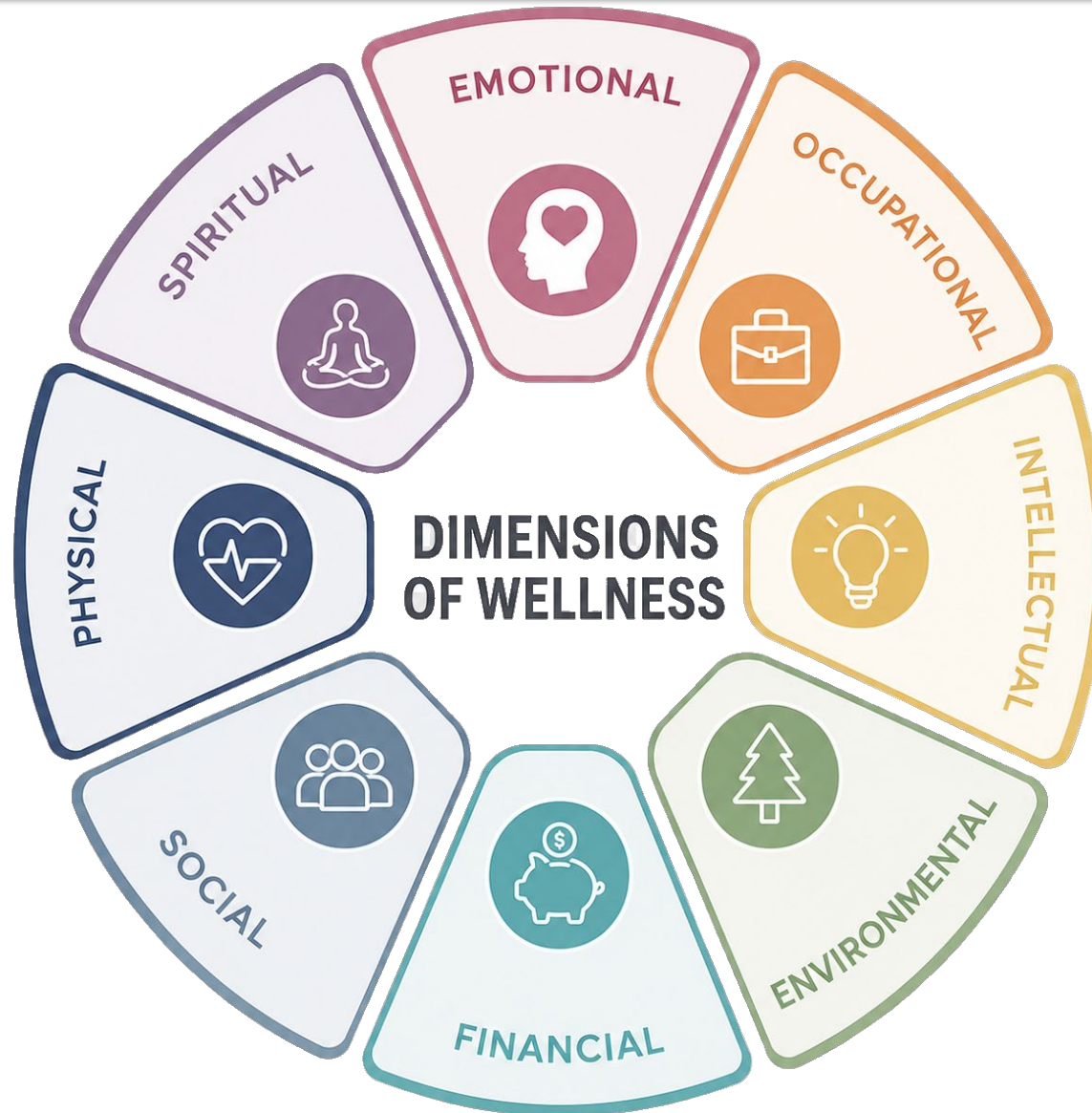




# What is case management?



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# What case management is not



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- ✓ Therapy
- ✓ Diagnosis
- ✓ Conduct adjudication
- ✓ Emergency response
- ✓ Legal advice



# Core case management functions



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**1**

Receive referrals

**2**

Assess needs

**3**

Develop a plan

**4**

Coordinate resources

**5**

Follow up

**6**

Document

# Where case managers help



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- ✓ Mental health concerns
- ✓ Conduct-related concerns
- ✓ Access to services
- ✓ Food, finances, housing
- ✓ Academic disruption
- ✓ Medical or family crisis

## Collaboration

Facilitate warm hand-offs by making appointments or initiating first steps

## Exploring Options

- Policy/process
- Institutional support offices
- Community resources
- Creative solutions

# Case Management's multi-faceted role

## Action Plans

Develop a plan forward with clear action items or "next steps"

## On-going Support

Make a follow-up appointment to check-in and opportunity to review information and make adjustments



# Where case managers help



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# Where case managers help



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## Doing

**“With”**



**“For”**

# Mental health support

Supportive measures reduce harm and connect to help.



## Listen and Assess Needs

Offer a sounding board for students' concerns while assessing the level of care and support needed through structured intakes and trauma-informed counseling.

## Connect to Care

Based on the assessment and intake documentation, help the student find assistance from on- and off-campus resources.

## Support & Follow Through

Ensure services meet the needs they were created to serve, identify obstacles to care, and make adjustments.

## Coordinating Return to Campus Plans

*Case Management can assist students when making the decision to leave campus through various leave processes (medical, psychological, unspecified) and assist with return to campus plans, helping them feel hopeful and supported during this often difficult time.*

***Case Management can also raise concerns when a student they are working with requires more intensive support and care.***



# Conduct-related concerns

Case managers can assist students struggling with conduct.



## Supporting students as they enter and navigate the student conduct process

- ✓ Help them understand the process itself
- ✓ Identify needs to assist them in navigating
- ✓ Reduce barriers and overcome obstacles
- ✓ Connect to resources and supports on campus
- ✓ Help ensure the student meets expectations

## Helping students have access to services during stressful times

- ✓ Counseling support on or off campus
- ✓ Disability accommodations & modifications
- ✓ Financial aid, housing, legal bills and court fees
- ✓ Assess academic tutoring and advising services
- ✓ Community support and care (on/off campus)

**Case Management can be supportive in many different departments, such as student conduct, Title IX/VI, or academic integrity issues.**

# Academic Disruption

Helping the student navigate academic challenges



## Attendance Concerns

Assessing/supporting students with attendance problems. Determining why this is occurring, how vast the scope is, and the context (time of semester, how deep the hole is).

## Sudden Grade Decline

Case Managers can assist in better understanding a sudden change in behavior or grade decline in the classroom to better coordinate a risk mitigation plan.

## Medical Withdrawal

Assisting students in navigating the various withdrawal processes as well as the financial aid implications.

## Coordinating Return to Campus Plans

*As mentioned previously, Case Managers can help assist and navigate the various departmental challenges related to a withdrawal, leave of absence, and anticipate how to prepare for a return to campus. This is particularly important when the student is already feeling underwater and struggling.*

***Case Management can serve as a liaison/translator for the student when talking to advisors, professors, and others in the academic withdrawal and return process.***

# Basic Needs

Growing concern for students lacking basic support.

1

## Food Insecurity

Having enough to eat and how to access help.

2

## Emergency Funds

Knowing what help is available and where

3

## Housing Instability

Finding short- and long-term solutions to housing

4

## Transportation Barriers

What access do they have, and do they need?

5

## Technology Access

Assessing needs and connecting to resources.





**Quis custodiet ipsos  
custodes?**



# Supporting and Supervising Case Managers



## Clarify Roles and Expectations

- Avoid role confusion by defining the scope of case management vs. counseling, advising, or conduct
- Document workflows, referral processes, and response timelines

## Ensure Integration with BIT/CARE

- Align case manager tasks with team protocols (e.g., risk rubric, follow-up timing, communication standards)
- Encourage joint ownership of cases with team members, not just referrals downstream

## Supervision and Structured Support

- Schedule regular 1:1s with time for clinical case review *and* reflection
- Use supervision as a check-in for well-being, boundaries, and professional development

# Putting it into Practice



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After a class, a student confides to their professor that they have been sleeping in their car for most of the semester.

## Sort the Support

- 1 Main concern
- 2 Hidden needs
- 3 Case manager role
- 4 Campus partners
- 5 Next steps

# Putting it into Practice



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A student misses three weeks of class after hospitalization for suicidal thoughts while on campus.

## Sort the Support

- 1 Main concern
- 2 Hidden needs
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# Putting it into Practice



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A student yells at their roommate and is required to meet with Student Conduct. They do not attend the meeting.

## Sort the Support

- 1 Main concern
- 2 Hidden needs
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- 5 Next steps



# Putting it into Practice



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A student has panic attacks before exams and has not contacted disability services.

## Sort the Support

- 1 Main concern
- 2 Hidden needs
- 3 Case manager role
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- 5 Next steps

# Putting it into Practice



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A student tells a friend they cannot afford groceries after losing work hours. The friend shares this with the BIT/CARE.

## Sort the Support

- 1 Main concern
- 2 Hidden needs
- 3 Case manager role
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- 5 Next steps

# Different Campus Models

Not all campuses approach case management the same way.

## Stand alone

- Clear referral pathway
- Specialized staff
- Consistent documentation
- Data and trend tracking
- Central coordination

## Student Conduct

- Improved follow-up
- Better informed on process
- Connection to supportive measures
- Improved meeting of conduct expectations

# CASE MANAGEMENT MODELS

## BIT/Care Model

- Early intervention
- Collaborative review
- Pattern detection
- Intervention planning
- Monitoring and follow-up

## Hybrid Approach

- Addressing retention
- Trained partners
- Shared protocols
- Common documentation
- Regular consultation.

*The type of program structure shapes the workflow.*

# Model Comparison

Two central questions you should ask for any model

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Where does the  
referral land?

Who coordinates  
follow-up?

**Make sure to also have a plan in place to review trends  
and adopt a growth mindset and after-action process.**



# Map the Pathway



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A sophomore is referred by a faculty member after missing three weeks of class and submitting writing that mentions hopelessness.

Residence life reports roommate conflict and possible off-campus couch surfing.

The student says they are behind on rent, have not eaten consistently, and are afraid of being “in trouble” because of a prior conduct warning.

## Build the Plan

1

Safety and urgency

2

Needs and strengths

3

Campus partners

4

Community partners

5

Follow-up timeline

# Documentation and follow-up

Clear documentation defends our work and allows others to help.



1

## Objective Facts

What are the core elements of the case in terms of behaviors and risk and protective factors at the start of the case?

2

## Student Needs

All interventions should be based on the students' needs, tied to the college's requirements and expectations

3

## Referrals Offered

Clearly document both on- and off-campus referrals and how the student can access these services based on their needs.

4

## Student Response

Explain how the student approached the interventions, any successes or obstacles they encountered, and the plan to move forward.

The adage applies here: “If you didn’t write it down, it didn’t happen.” Good documentation shows our process and enables others to coordinate with our efforts.

# When to escalate



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**1**

Imminent Safety

**2**

Threats

**3**

Targeted Violence

**4**

Medical Emergency

**5**

Abuse, Title IX/VI

**6**

Severe Impairment

# Key Takeaways

Here is a review of some key principles we have covered

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1

Case Management connects various systems on campus to ensure they work at peak efficiency.

2

Students' support needs are often layered across departments, and Case Management helps coordinate them.

3

Having clear assignments and boundaries helps protect students and staff as well as ensures best practice and mitigates legal risk.

4

The Case Management program model we choose helps address specific workflow processes such as intake, coordinated care, and follow-up.

5

Case Management focuses on follow-up and service fidelity. It moves the college away from “one-and-done” interventions.

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# Ideas to Consider



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A coordinated support process that helps students

**Rapport  
Builder**



**System  
Navigator**



**Resource  
Connector**



**Follow-up  
Specialist**



**Next Steps  
Assessor**





# Knowledge Check

Some final questions to consider as we wrap up

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1

What does a Case Manager do?

2

What is outside the role?

3

Name three referral areas.

4

What is your preferred program model?

5

What belongs in a follow up?