



CASE STUDY — COMPLEX CASE MANAGEMENT & EDI SYSTEMS

ID Inclusion

SAMANTHA MORGAN · COMPLEX CASE MANAGEMENT & EDI SYSTEMS

Turning Frontline Insight Into Tools an Organisation Keeps Using

Working within a specialist mental health and resettlement service, Samantha went far beyond the standard case-management remit — writing case studies that supported funding bids, building new EDI tools for recruitment and the workplace, and creating evaluation tools the wider team still uses.

Funding

case studies written to support successful bids

New

recruiter, staff & employee EDI packs created

Evaluation

tools developed and adopted by the wider team

High-level

strategic input alongside frontline delivery

THE GAP

Clients with overlapping barriers were falling through gaps between services that didn't communicate, and the organisation lacked practical, adopted tools for embedding inclusion into recruitment for its clients.

THE APPROACH

Beyond frontline case management, Samantha wrote case studies to support funding bids, developed new EDI tools — recruiter, staff and employee packs — and built evaluation tools the wider team uses to track patterns across cases, alongside high-level strategic input and safeguarding coordination across housing, health and justice services. She also wrote comprehensive safeguarding recommendations.

THE RESULT

Case studies contributed to successful funding bids, new EDI packs were adopted for recruitment and staff practice, and the evaluation tools she built are still used by the wider team to catch systemic gaps earlier.

SELECTED IMPACT

- ✓ Case studies written to support successful funding bids
- ✓ Built evaluation tools adopted across the wider team
- ✓ Created recruiter, staff and employee inclusion packs, now in use
- ✓ Coordinated safeguarding escalation across agencies

FEATURED & PRESENTED AT

BBC News · BBC Radio Suffolk · British Psychological Society · British Sociological Association · Times Higher Education · Suffolk News · East Anglian Daily Times · Open University · Alcohol Change UK · Alcohol Health Alliance