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Creating Balance in Case Management

switchboard
connecting resettlement experts



Today's Speakers



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Switchboard Throwback Thursdays



Did you miss a Switchboard webinar? Catch our top sessions, back by popular demand, now with **Switchboard's Throwback Thursdays!**

Our new **Throwback Thursday series** brings back our most-requested webinars, giving you a second chance to catch the insights you need. While recordings are always available, joining live offers a unique opportunity to ask questions and engage with fellow service providers.

As with all our sessions, this webinar is open to **all refugee service providers** across state agencies, resettlement organizations, and partner groups.





Learning Objectives

By the end of this session, you will be able to:

1

Recognize

several common challenges of case management while identifying strategies to set healthy professional boundaries with clients

2

Describe

ways to improve work-life harmony, including shifts in mindset and self-care strategies

3

Apply

new time management approaches and organizational tools to navigate high caseloads



Setting Boundaries with Clients

What is your "why" for doing this work?

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Challenges in Case Management

- Large caseloads
- Complex client needs
- Paperwork requirements
- “Overworked and underpaid”
- Trauma-exposed work environments



What are boundaries?

Boundaries are limits on staff behavior that ensure appropriate, safe, and effective interactions.



Types of Boundaries



Professional

Staying within your scope



Physical

Being considerate of personal space

Relational

Maintaining appropriate relationships with clients

Work-life

Taking care of yourself

The Importance of Boundaries



**Build Trust and
Establish Safety**

**Help Ensure
Consistent Services**

Empower Clients



Reduce Harm

**Provide Legal
Protection**

Prevent Burnout

Setting Boundaries with Clients



1

**Limit self-disclosure
and sharing of
personal details**

2

**Keep physical contact
to a minimum**

3

**Stay within the scope
of your role**

4

**Treat all clients
equally, and
consistently enforce
rules**

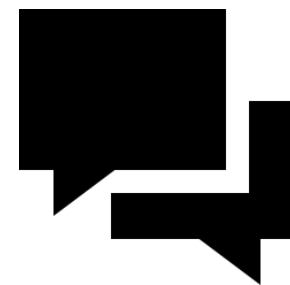
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**Do not borrow or lend
money to clients, and
set rules around gifts,
food, and drink**

6

**Seek support from
supervisors when
needed**

Setting Boundaries with Clarity and Respect



“I’m hearing that finding a new apartment is really important to you and your family. **Unfortunately, I am not able to help with that.** I would be happy to **refer you to someone else who may be able to help.**”

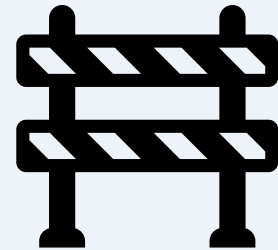
“I know that would help you a lot. I wish I could do that for you. **But I am not able to. My job is to focus on _____.**”

Guidelines:

- Validate the concern
- Set the limit
- Provide an explanation
- Offer an alternative



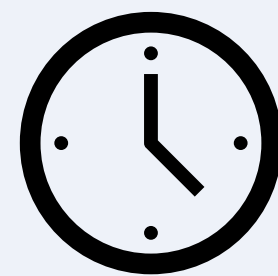
Maintaining and Reinforcing Boundaries



- Give reminders
- Use consistent messaging
- Provide referrals when possible
- Seek support from colleagues and supervisors
- Document and follow up on any boundary crossings



Addressing After-Hours Client Needs



- Use a strengths-based approach
- Provide after-hours plans and resources
- Assess client's "urgency" carefully
- Stick with your work schedule and professional boundaries
 - *Exceptions might become expectations*



2

Improving Work-Life Harmony



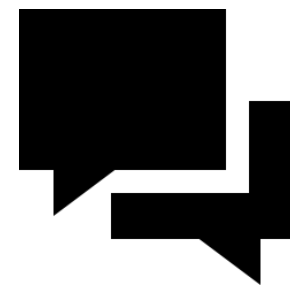
Maintaining Work-Life Balance



- Make changes in mindset
- Only work your scheduled hours
- Do not answer phone/emails outside of work hours
- Look for role models
- Advocate within your agency

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Transitioning from Work Mode to Personal Time

- Write down lingering “to do’s” before you leave work
- Make an intentional transition between work and home
- Use exercise or body movement to de-stress

Identifying Resources and Support

- Supportive supervision
- Professional mentorships
- Switchboard resources and technical assistance
 - Communities of Practice
- Personal therapy



Helpful Self-Care Strategies



Mind



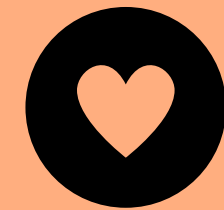
- Focus on what you can control
- Celebrate small successes
- Do visualization exercises
- Practice gratitude and mindfulness

Body



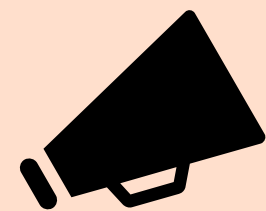
- Exercise
- Get some sunshine
- Pay attention to nutrition
- Practice good sleep hygiene

Spirit



- Spend time with friends and family
- Connect to religious/spiritual beliefs
- Listen to music
- Spend time in nature

Advocating for a Supportive Work Environment



- Become a trauma-informed care “champion” at your organization
- Generate buy-in from leadership
- Find partners within your agency
- Be a role model and source of support for others



3

Navigating High Caseloads

Time-management and organizational tools

Prioritizing Needs



- Create a comprehensive to-do list
- Apply Maslow's Hierarchy of Needs
- Assess deadlines and urgency
- If tasks are equally necessary/urgent, alternate work times for each one
- Complete easier items first, planning ahead for more time-consuming tasks
- Break overwhelming projects into smaller tasks with deadlines

Managing Your Time Effectively



Check with your manager for direct service hour expectations



Consider scheduling 50-minute meetings instead of 60-minute meetings



Schedule follow-up tasks in your calendar



Re-balance your caseload with your supervisor once per quarter

Getting and Staying Organized

- Utilize to-do lists
- Customize a preexisting template or create your own tracking system
- Use your calendar!



Finding Time for Documentation



1

Prioritize your tasks

2

Set boundaries with clients

3

Schedule time

4

Limit distractions

5

Don't let it pile up

6

Use structured templates

What strategies do you use to help you find time for the administrative side of case management work?

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Questions?

Type your question in the **Q&A**

Click **thumbs-up**  to vote for others' questions

Learning Objectives



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Help us help you!

Scan the QR code or click the link in the chat to access our feedback survey!

- Five questions
- 60 seconds
- Helps us improve future training and technical assistance



Recommended Resources





Switchboard

- **Archived Webinar:** [Organizational Approaches to Staff Care and Retention in Resettlement](#) (2024)
- **Archived Webinar:** [Balancing the Demanding Needs of Case Management](#) (2022)
- **Archived Webinar:** [“I Was Already Burned Out, and Now This...” Strategies for Staff and Supervisors to Mitigate Burnout, Vicarious Trauma, and Other Occupational Hazards](#) (2020)
- **Guide:** [Preventing Occupational Hazards by Promoting Organizational Resilience](#) (2020)
- **Podcast:** [How Can Supervisors and Organizations Support Staff Care?](#) (2020)
- **Evidence Summary:** [What works to reduce burnout and vicarious trauma among refugee service providers?](#) (2020)

Center for Victims of Torture (CVT)

- **Toolkit:** [Fundamental Skills for Self-Care](#) (2021)
- **Archived Webinar:** [Boundaries in the Electronic Age](#) (2019)



Preventing Occupational Hazards by Promoting Organizational Resilience

Burnout, secondary traumatic stress, vicarious trauma, and compassion fatigue are all considered occupational hazards. These effects can result directly from working in certain professions, such as refugee service provision. The internal culture and environment of an organization can increase a staff person's vulnerability to these occupational hazards, or these can enhance organizational resilience. This guide provides recommendations for supervisors and leaders to promote resilience and reduce occupational hazards among their team members.

What is Organizational Resilience?

An organization's culture and environment can make a big difference in the levels of distress that staff are feeling. **Organizational resilience** is the ability of an organization to survive negative events (such as COVID-19, financial hardship, or layoffs) while being as supportive or more supportive of staff and clients as before the negative events. This relates to individual resilience: a person's ability to adapt and survive adverse experiences without them negatively affecting key components of their character.

Organizations struggling with high rates of **occupational hazards**—burnout, vicarious trauma, secondary traumatic stress, and compassion fatigue—

also suffer high turnover and low staff cohesion. Without staff cohesion, team members have reduced ability to work together effectively, anticipate each other's needs, and support each other. Even when staff choose to stay at an organization after feeling the impacts of occupational hazards, their effectiveness within their job is likely to suffer. Organizational resilience can combat these effects.

Organizational resilience is essential not just for staff, but for clients. Refugee-serving organizations want to ensure that people who have experienced forced migration receive the highest quality services they can offer. Service providers are among the first people that newly arrived families encounter as they begin to build new communities in the U.S. If service providers are

1



Stay Connected



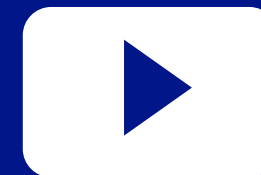
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