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Creating Balance in Case Management

December 10, 2025

Today's Speaker

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Training Officer, Switchboard

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Learning Objectives

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

Recognize

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

01

Describe

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

02

Apply

new time management approaches and organizational tools to navigate high caseloads

03

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Setting Boundaries with Clients

01

02

03

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What is your "why" for doing this work?

Challenges in Case Management

- Large caseloads

- Complex client needs

- Paperwork requirements

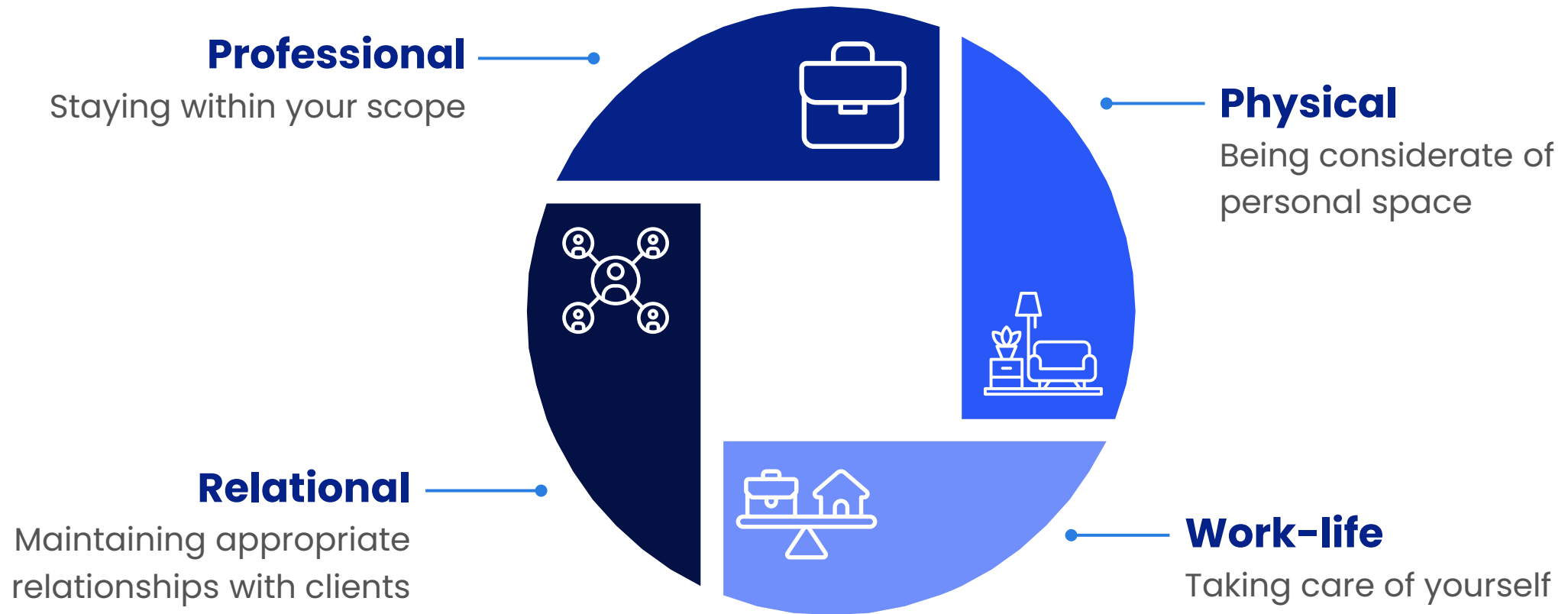- "Overworked and underpaid"

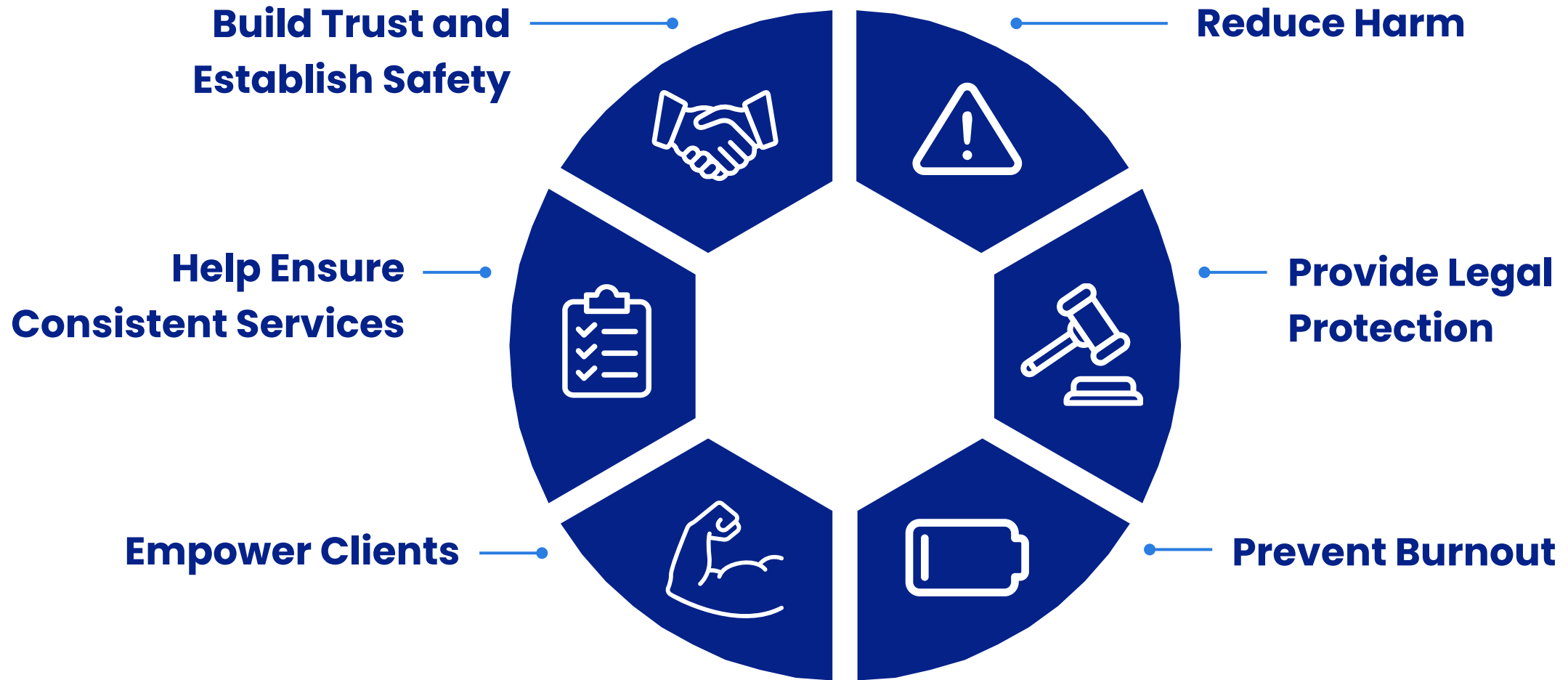- Trauma-exposed work environments

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What are boundaries?

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

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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

Why Are Boundaries Important?

Build Trust and Establish Safety

Reduce Harm

Help Ensure Consistent Services

Provide Legal Protection

Empower Clients

Prevent Burnout

Setting Boundaries with Clients

Limit self-disclosure and sharing of personal details

Treat all clients equally, and consistently enforce rules

Keep physical contact to a minimum

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

Stay within the scope of your role

Seek support from supervisors when needed

Setting Boundaries with Clarity and Respect

Guidelines:

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

"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 help you search for better employment. **But I am not able to. My job is to focus on _____.**"

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 clients' "urgency" **carefully**

- Stick with your **work schedule** and **professional boundaries**

  o Exceptions might become expectations

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Improving Work-Life Harmony

01 **02** **03**

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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What are some aspects of your identity other than your role at work? What else makes you "you"?

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

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Identifying Resources and Support

- Supportive supervision
- Professional mentorships
- Switchboard resources and technical assistance
- Communities of practice
- Personal processing

Helpful Self-Care Strategies

Mind

01 02 03

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Helpful Self-Care Strategies

Mind

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

01

Body

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

02

Spirit

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

03

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What practical resources or strategies would help you manage your workload?

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

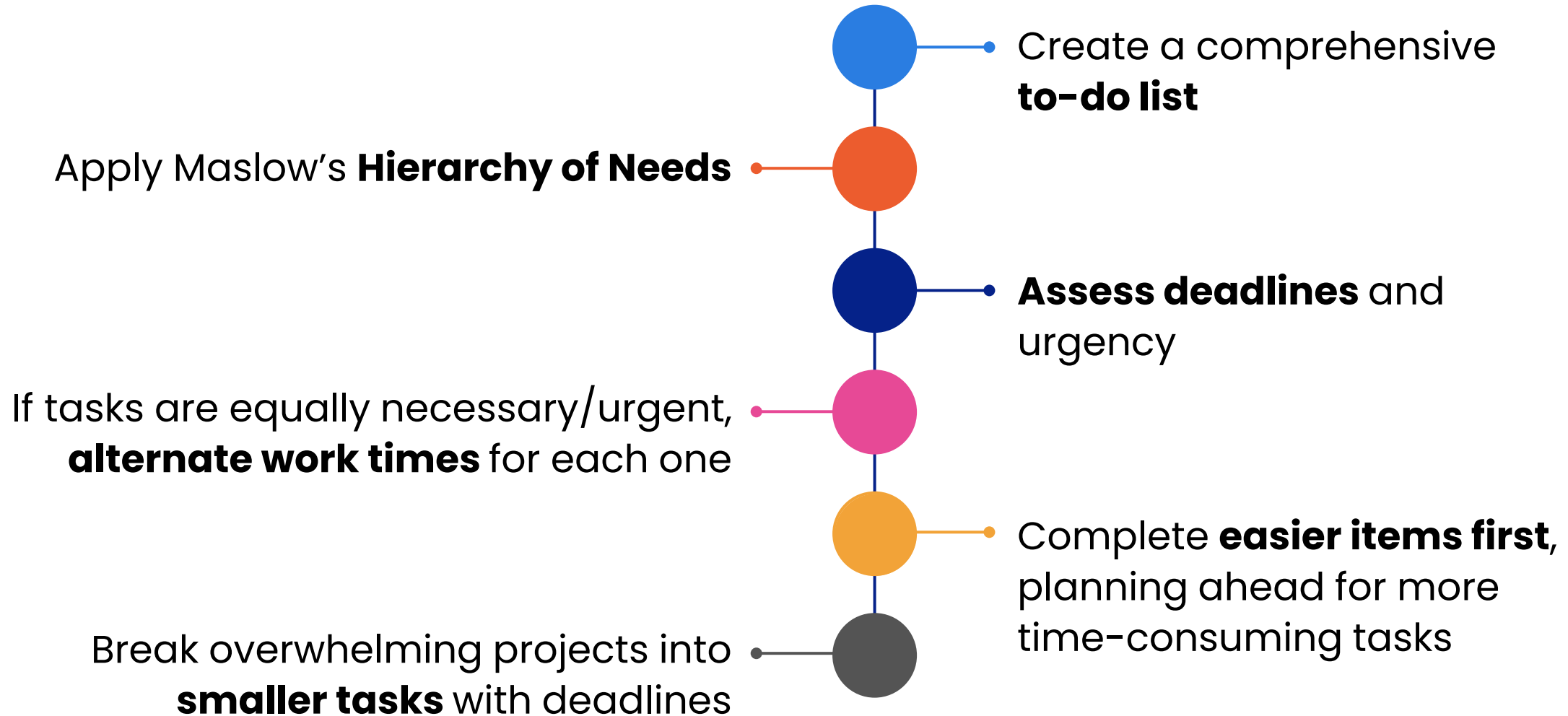- Be a **role model** and source of support for others

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Navigating High Caseloads

Time-management and organizational tools

01 02 03

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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

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Managing Your Time Effectively

Check with your manager for workload 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

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Getting and Staying Organized

- Utilize **to-do lists**

- Customize a preexisting template or create your own **tracking system**

- Use your **calendar**!

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Finding Time for Documentation

Prioritize your tasks

Limit distractions

Set boundaries with clients

Don't let it pile up

Schedule time

Use structured templates

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

Questions?

Type your question in the Q&A

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Recommended Resources

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- **Archived Webinar:** [Enhancing Refugee Care: The Link Between Provider Well-Being and Service Quality](#) (2025)

- **Tool:** [Case Capacity Calculator](#) (2025)

- **Archived Webinar:** [Organizational Approaches to Staff Care and Retention in Resettlement](#) (2024)

- **Blog:** [Case Management Documentation: Making the Paperwork Work for You](#) (2024)

- **Tool:** [Client Rights and Responsibilities](#) (2022)

- **Archived Webinar:** [Balancing the Demanding Needs of Case Management](#) (2022)

- **Guide:** [Preventing Occupational Hazards by Promoting Organizational Resilience](#) (2020)

- **Podcast:** [How Can Supervisors and Organizations Support Staff Care?](#) (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

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