Creating Balance in Case Management

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Maya Wahrman (MW): Hi, everyone. Welcome to today's training, Creating Balance in Case Management. I'm Maya Wahrman. I'm a licensed social worker in the State of New Jersey, Master's of Social Work from Rutgers. I am really excited to be with you all here today. This is one of my favorite topics to present on. It's one of the things that brought me to the social work discipline. I had already been in refugee and immigrant services, but really wanting to think about how can we professionally create balance, professional boundaries, and ethics within our work so that we can do it long-term and sustainably is something I'm really passionate about. I'm excited to be here with all of you. I see folks are still joining, so welcome. I want to thank Jasmine and Rebecca, my colleagues who are helping on the back end here. We couldn't do it without the whole switchboard team. We're going to dive in. We have a lot to cover, but please keep joining in.

I just want to acknowledge we're navigating some deeply complex times, from funding challenges to the broader uncertainties around resettlement. There are layered issues that impact us in many different ways. We're all trying to make sense of what this means for our communities and futures. That's why spaces like these matters. Your presence here today shows a commitment to understanding solidarity and finding a way forward together. I'd like to thank you for showing up.

By the end of this session, we hope you'll be able to recognize several common challenges of case management while identifying strategies to set healthy professional boundaries with clients, describe ways to improve work-life harmony, including shifts in mindset and self-care strategies, and apply new time management approaches and organizational tools to navigate high caseloads.

Setting Boundaries with Clients

MW: Let's jump right in here. First, we're going to talk about setting boundaries with clients, which truly is one of the most important topics that we can talk about within refugee service provision and case management, both for our client's good and our own. Before we go into those boundaries, I want to go to our tool called Slido. We'll be using this throughout today's presentation. It may take a moment for the QR code to show up for us here. You can go to slido.com if you're not using your phone, if you prefer to open this in a browser.

We want to hear what is your why for doing this work. For example, my why, I come from a family history of folks being refugees. My grandparents, my great-grandparents were generations mainly of Jewish refugees fleeing Eastern Europe and Germany. I've been fortunate to grow up in a very privileged world with stable citizenship, and access to housing, and education and resources, so I've always felt drawn to support those who have been less fortunate. What I really love about refugee resettlement work is that we're all working to create a more diverse, just, inclusive world by supporting and uplifting people who make our communities better.

I see that folks have already entered the Slido, which I'm really grateful for. Please scan that QR code or come on in in slido.com and put in that code 2139 600. If you enter a word that someone has put already, it'll get bigger. This is a word cloud. I see passion and to help children are popular answers, but there are a lot of really great answers here. I love helping people, curiosity, to serve this community, positive change, tradition, sharing knowledge, I'm an immigrant, love, dignity, family, humanity, I'm a refugee, it's a privilege to serve other refugees. I see faith-based responses in here. Safety.

These are all really core values that I'm seeing, and I want to elevate here. We're all here because we really care about this work. We wouldn't be here if we didn't. It can be really hard to do this work when we really care, but we still have to set boundaries and nourish ourselves, and also do what's best for our clients. I really want to uplift this. I appreciate you all for participating. I want you to keep that why in your mind and maybe in your heart as we go through, so you remember, why is it important to set boundaries? Why do I need to create this balance in my work? Because we all have really important reasons for being here. I also want to shout out anyone who was here with lived experience of being an immigrant or a refugee. Thank you for giving back and doing this work. That can also make some boundary setting a little bit challenging sometimes. I'll try to touch on that a bit. I encourage you to think about how that might affect your ability to create balance in case management. Thanks, everyone, for participating. You can keep that Slido open, and different prompts will come up throughout this presentation.

MW: We talked about our why. We have a lot of challenges in case management. These will be familiar to you. Large caseloads, complex client needs, paperwork requirements, the feeling that we're overworked and underpaid, and trauma-exposed work environments. These are a lot of challenges. The trauma-exposed work environments can lead us to burnout. It can lead us to compassion fatigue. Does it matter how much I care if it's not helping? Is it useful that I care, or do I have it within me to keep caring? These can all lead to secondary trauma stress reactions. This is not a trauma-informed care-based presentation. We'll be having more of those publicly in the new year. It is really important to name that these are hazards or challenges in case management. We do it because of passion, humanity, dignity, all these things you just named in your why. We want to help people, it feels good, it feels rewarding, and we really care about our clients. This is what can lead to boundary issues, if we're all caring, and all passion, and we're not looking to mitigate some of these other challenges.

Let's talk about what boundaries are. Boundaries are limits on staff behavior that ensure appropriate, safe, and effective interactions. What does that mean? There's a few different types of boundaries we encounter in our work here in case management on the next slide. One type of boundary is professional. That means staying within your scope. If you are trained as an employment specialist but not as a mental health professional, it's important to stay within your scope and not try to give mental health support. That goes the other way around. As someone who was more trained on the mental health side than the employment side, I've definitely been in that situation.

You can use your client rights and responsibilities to really make sure clients understand their scope. "Hi, I'm Maya. This is my role. This is what I help you do. This is what I would need to refer you out for because I don't have the time, the bandwidth, or the expertise to give you the support that you need in that capacity."

We're going to talk a little bit more about setting boundaries clearly and respectfully a bit later.

Other kinds of boundaries. Relational, so maintaining appropriate relationships with clients. Relational, this also goes into our personal lives and with colleagues. We want to avoid dual relationships, meaning if someone is our client, that they're also our friend or our family member. I know this can be difficult in tight-knit communities, especially if we're from some of these refugee communities, but making sure that we're really managing any dual relationships that come up and not befriending some clients and becoming closer to them than other people. They are clients. When they are our clients, they're not our friends. We have a service provision relationship with them. This will help us avoid favoritism or unequal treatment. If possible, to not give out your personal phone number, only a work phone number or a Google Voice number. If that's something that your agency enforces, that is really helpful in maintaining these relational boundaries. It's really important for us to model these for clients because they may be coming from environments where they've not had this kind of service provision relationship before. It's not that they want to violate boundaries, they just are not sure how to respect them. We can set a model as professionals.

MW: We want to respect physical boundaries, so being considerate of personal space. Think about if someone is comfortable culturally or otherwise with any kind of physical contact, even a handshake. We want to be aware of personal space. No casual touching. Sexual relationships with clients are prohibited. I experienced this in the field with someone I was working with when I joined a resettlement agency, that they had to resign for having a dual relationship, sexual and romantic, with a client. These things do happen, so it's important to name those physical boundaries.

Then work-life boundaries, so taking care of yourself. This is really important to making sure we can continue to do this work longer term and to not burn out. This is a part of the boundary package, but we're going to get into it a bit later in this presentation on some practical skills for taking care of yourself.

Why are boundaries important? For clients, boundaries build trust and establish safety. This is how clients know what your scope is, what you are going to do, and what you're not. The expectation setting is really important in relationship building with clients and making sure everyone knows what is going to happen and what's not. It's really a part of strengths-based approaches and trauma-informed care to build trust and say, "This is what we are doing, and this is what we're not doing." It helps establish that safety and that consistency.

That takes us to the next point. It helps ensure consistent services. If you want your services to be equitable and fair across the board, make sure clients know that they're not being treated one way or discriminated against for being who they are or from whatever background. Boundaries say we treat clients equitably. We make sure they get what they need within the scope. We're not doing extra things for certain clients. As I'm sure a lot of you know, clients talk. They talk to each other. Don't expect if you're doing something extra for a client, for that not to become public knowledge. You want to make sure that you're ensuring those consistent services. Also, for just the fairness of your organization.

MW: Boundaries really help empower clients. What power has been taken away from clients, things that they don't know or think that they can do themselves because of being disenfranchised or being marginalized? How can we restore power to clients, and how can we remind them of some of their strengths? A lot of our clients have had really long, tough journeys to come here to the United States. They are tired, and if they sense that a caseworker can do something for them, why not? I would also have someone do my household chores for me if I could, for example. We want to ensure that we're telling clients and showing them they can do things for themselves, and empower them to learn those skills. Even if it's something they haven't done before, they need to learn a new skill so that eventually they can go on without us, because we won't be their service provider forever. That's another reason boundaries are important.

Boundaries help reduce harm. If there's clients who are vulnerable, it ensures that there are protocols around how to support minors, older adults, anyone who's vulnerable to exploitation or abuse, making sure that clients who have had a past trauma or some kind of abuse or exploitation have clear rules about how they're going to be treated in the office. All of these things help protect clients and reduce harm. Our first duty is to do no harm before we're even jumping into service provision.

MW: This takes us into providing legal protection. Boundaries are really important to make sure, in this next bullet, that if something happens, if there's a discrepancy with what a client says they've received or if they say they weren't treated equitably, ensuring that all of us as staff are following these boundaries, are setting them, and are carrying them out, we have legal protection if anything goes wrong, or if there's some kind of grievance filed.

Finally, boundaries help prevent burnout. This is, as you can see, one of our top priorities in terms of this presentation. How can we actually do this work long term? If we don't set boundaries with one client or our first client, we will be overextending ourselves. It's just not sustainable to do all the things that we might want to do or feel that we're able to do for clients without burning out. It's really important to set those boundaries to keep doing this work sustainably.

How to set boundaries with clients. We have some tips and tricks here. We want to limit self-disclosure and sharing of personal details. I like to think about self-disclosure is not just a never do it because sometimes you may want to share something about yourself that will help a client feel comfortable or validated. I would like to ask you to notice, are you sharing this information for your own sake because you're excited that you share something with a client or that you want them to know something about you, or are you sharing it because you genuinely think it would support them and uplift them? Say, "I'm a parent too," or, "I've been in this situation."

If you think that it will really uplift and support that client, it may be appropriate as a rapport building or to build that relationship to self-disclose. I also would ask you to think, are you okay with that info being out there? Because once you've told one client, "I'm a parent." “This is the community I live in," whatever it is, that information is out there. That client is not necessarily bound to the same confidentiality about your information as you are to theirs, and that might be public information. Think about what you're actually comfortable with sharing and being out there, not just in the moment. That can be one way to help us navigate. We want to be people. We want to show up authentically to our clients, but we also want to limit how much we share about ourselves and how much we maybe make the interaction about ourselves instead of about the client and their experience and needs.

MW: The next one is keeping physical contact to a minimum. I already talked a little bit about this. There are cultural considerations when it comes to physical contact. From some cultural or religious backgrounds, it wouldn't be appropriate even to shake hands across genders, or some cultures may be a little more into handshakes or even hugs. I would stay away from hugs, try to keep all physical contact, if at all, professional.

Some ideas if you're really wanting to show respect and go in for a handshake, some physical alternatives I like are namaste hands or putting your hands on your heart, "So nice to meet you." This really helps show that respect, build that rapport without making anyone uncomfortable with any physical contact that could maybe be misinterpreted. You want to make sure that you're not having those relationships with clients, that everything you're doing is intentional and professional, as we talked about with those relational and physical boundaries.

You're going to want to stay within the scope of your role. I already touched on this, but really think about what you are equipped to do for a client and what you have the bandwidth to do. Staying within the scope of your role helps clients understand what you are there to do and what you're not. It's also important to not set unfair expectations that your colleagues will have to follow, or for future caseworkers, if you're saying, "That's not in my scope, but I'll do it because I can, because I care," the next caseworker might care, but they might not be able to do that, and so that sets unfair expectations. It's really important to stay within the scope of our role.

MW: We want to treat all clients equally and consistently enforce rules. This is really important. Again, we don't want some clients to feel that they're getting more services than others or that they're being treated differently. This is where you really want to lean on your agency protocols or client rights and responsibilities. This is how it's done. This is your intake sessions to make sure clients know the expectations. Then, to refer to something, if a client asks you, "Can you do this for me?" to say, "Hey, I actually don't do this for any clients. This is agency policy." We're enforcing those rules. It's not a way to shut down the conversation, it's to say, "This is how we stay ethical and within scope for everyone."

We don't want to borrow or lend money to clients. We want to set rules around gifts, food, and drink. I'm a social worker. If you read the NASW, the National Association of Social Workers, Ethics Handbook, it'll say, "Absolutely no food and drink from clients." I've always thought that that isn't the most culturally accessible way that we can do this work because we know that a lot of our clients giving us a cup of tea in their home, for example, is a real act of empowerment for something that they maybe haven't been able to do, haven't had a home, and it can be really important culturally. Try to set some rules that you're going to, again, consistently enforce across the board.

Receiving a drink, tea, a small snack in someone's home is really different from having a client take you out to an expensive dinner or get you a big gift. This is where you want to refer to your agency protocols around gifts. Sometimes there's a dollar amount, that no more than $20 or something, or that you have to disclose it or return it. You do want to follow those agency protocols, but make sure you also find what you're comfortable with. If accepting a cup of tea is a way to really build rapport with that client, and as long as you have that rule consistently, I think that's fine. If you have a dietary restriction, that means you can't accept a food, a snack, or drink in someone's home, you need to have that rule for yourself, and that's a boundary to protect yourself. That's a work-life balance. Also to not feel pressured in that way, you have to follow what works for you and what's going to be supportive to the clients, and follow agency protocols. That's why we phrase it this way, not just as red lines here or there, but to think intentionally about why we're setting these boundaries and what it would mean to violate those boundaries.

MW: Finally, in setting boundaries with clients, it's really important to seek support from your supervisors when needed. We're going to talk in the next slide about how to set boundaries well, what to actually say. Sometimes people do not respect our boundaries, even when we set them clearly and kindly. That's when we need to look for support from supervisors to maybe step in, have a conversation with the client, and change that dynamic to make sure that that boundary does not keep getting crossed.

Let's talk about setting boundaries with clarity and respect. Some guidelines, we want to validate the concern, set the limit, provide an explanation, and offer an alternative. This is some ways that we can set the boundary clearly and kindly. Let's look at some examples. "I'm hearing that finding a new apartment is really important to you and your family. Unfortunately, I'm not able to help with that. I would be happy to refer you to someone else who may be able to help."

You're listening, you're validating the concern. You're saying, "I can't help with that." You might say why. "I'm not authorized," or, "I don't have the capacity. I don't work on our housing team. How can I help you meet that need? Who can I refer you to? What's the alternative?" Let's see one more. "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 X," so mental health or housing. How can you explain to them that you care about them? You're not able to. It's not responsible of you ethically or professionally to do that. Then how can you find that alternative to send them forward?

MW: Maintaining and reinforcing boundaries. We have to set them from the beginning, set those expectations as we were discussing, but boundaries get crossed, people forget, people want other things, people think they do other things. We want to make sure that we know how to maintain and reinforce those boundaries by giving reminders. It's okay to say, "As I've told you, this is not something I'm able to do."

Use consistent messaging. Make sure they know the rule, that you say the same messaging. You're using it with your clients when you're giving reminders across the board, across clients, and across your agency to make sure the messaging is always consistent. These are the boundaries. These are the rules for everyone, so this is equitable. Provide referrals when possible. Think about, "This is not something I can do, but I see this as a point of concern. Can I refer you to a mental health clinic? Can

I refer you to an education tutor? Where else can I support you so you can get your needs met without crossing my own professional and personal boundaries?"

Seeking support from colleagues and supervisors. Again, this is where your supervisors can help, but also colleagues. Do you have any ideas on how to maintain boundaries with a certain client who keeps overstepping them, or how can I receive this support? You're doing this in community and on teams. Finally, it's important to document and follow up on any boundary crossings. If someone is continuously crossing boundaries or really oversteps the red line, make sure to put that in a case note. We're going to talk a little bit about case notes, but I'll be doing a training later this year, more on case documentation. It is important to follow up and to document it so it doesn't go unaddressed and unknown.

MW: That's a lot of good stuff about boundaries. Oh, and I want to talk also about adjusting after-hours client needs. I had one client who was very nervous. He arrived with his wife and baby, and she was pregnant again. He received a letter on a Friday afternoon that said, "Your food stamps is being revoked." He brought this letter in to me, and I said, "Listen, it's a Friday afternoon. Nothing bureaucratic in terms of reinstating food stamps, writing an appeal is going to happen between now and the end of the business day. There's nothing we can do about that. Let's get you some alternative food resources. This is our food alternative here in agency. These are local food pantries." Made sure that they had everything they needed, and I said, "We'll follow up on Monday to resolve this bureaucratic issue." I made sure that the immediate needs for food were taken care of.

I told this client, "I would not be working this weekend. This would not be able to be resolved," but he still called me on my Google Voice number nine times over the weekend. Then Monday morning, I actually had something more urgent to attend to. We'll talk about prioritizing needs in a bit. He texted me at 9:00 AM, "Can you help me?" Then texted me at 11:00 AM, "Hey, Maya, are you okay?" It ended in a funny way. I was able to follow up, but he could not fathom that I would have other needs to attend to over the weekend, let alone on Monday, before his. He thought maybe something had happened to me.

What I want you to take from this story is that I can have a lot of compassion for this client being very nervous about food insecurity for his family and wanting to resolve this as soon as possible, but that doesn't make that situation my emergency once I tended to the most urgent needs, once I made sure that that client had what they needed for the weekend, and I did not answer the phone. It was really important to not answer the phone and set an expectation that I could do something that I couldn't and work outside of my scope.

MW: Some tips following this to address after-hours client needs are to use a strengths-based approach. We talked about this some. How can you show a client you have the skills to do this, your community is there to help you? What other assets do you have to answer something if I'm not available? You're not always available after hours. Even if sometimes you are, that's not a reasonable expectation. What strengths does the client bring? What do they know and what can they draw on to address some of their after-hours client needs? That includes providing after-hours plans and resources. How do you address if they have an emergency? Do they know who to call and where to go? These are really important things to make sure they know after hours. Again, assessing client's urgency carefully. What feels really urgent to a client may not be as urgent, knowing the context that you know. Do you match their urgency? Can you validate that they do feel it's urgent while explaining that this is a routine, or in-process requests, so that there's not something you can do, but you have been working on it.

Really, think about how you can validate their emotional response but not give in to that sense of urgency or emergency if it's not necessary. You have to stick with your work schedule and professional boundaries no matter what; because otherwise, you just can't do this work if you're constantly overextending yourself. That means exceptions might become expectations. If you say, "I'll do this one time," it means they would say, "Well, why won't you do it next time?" Some clients will say, "Well, you did it for them, why not for me?" It's really important to enforce these rules.

2. Improving Work-Life Harmony

MW: Now we're going to talk about improving work-life harmony. What does it mean to really maintain work-life balance and be ourselves? We know we're not only ourselves at work, there's so much else to us. Maintaining work-life balance means making changes in mindset. Your job is only one piece of your identity. There are other people and strengths in that person's life that they can draw on if you're not available, only working your scheduled hours, not answering phones or emails outside of work hours, looking for role models, people who do this well, and advocating for this within your agency.

We're going to talk a little bit more about those, but I'd love to hear for just a moment. I don't want to run out of time, but would love to hear what are some aspects of your identity other than your role at work? What else makes you you? I'll remind you that the Slido is anonymous, and it is a Word Cloud. If you see someone has put gardening and you want to put that in, you can just re-enter it, and that word will grow bigger. We'd love to just take a snapshot of who's in the room and what else makes you you besides the work that brings us together.

MW: I see family, learning foreign languages, partner, faith. These are all really great responses. Dance, writer, enjoying the outdoors, ballroom dancer, motherhood, religion, traveling, journaling, sports, working out. I see such a rich diversity of experience and interest here. I do have to move on, unfortunately, but thank you so much for sharing and bringing your whole selves to today's presentation.

Transitioning from work mode to personal time. Try to write down lingering to-dos before you leave work, on a Post-it that you're going to see the next day. I'll often send myself an email. This is what I want to start tomorrow with. Make an intentional transition between work and home. If you are in person, is there a place on your way home, a building, or some threshold when you pass that in the car or walking, you say, "Okay, here I leave everything until tomorrow. I'm no longer thinking about work", or that touchstone, "I'm turning off the car. I'm walking in the front door, and my work day is over." Saying, "That was me at work, and now I'm me at home." Even changing clothes when you get home or showering after work. These can be really helpful, intentional transitions. Also, just doing exercise, some body movement to de-stress, take a breath, go on a walk, try to leave the workday behind you.

Identifying resources and support for improving your work-life balance. Making sure that you have supportive supervision, a supervisor who respects your work-life balance and wants to support you in that. If there are other professional mentors who can help you highlight that or make sure that you are respecting your own space and boundaries. Switchboard is here with resources and technical assistance. As you can see, I love talking about boundaries. We have a lot of resources here, or you could reach out. We'd love to help you think through how you can create better balance in your work-life harmony.

Communities of practice, which we have here at Switchboard, but any kind of peer group that helps you talk to other colleagues or peers, and work through some of these issues, get ideas so that you can improve your work-life balance. Finally, personal processing. This could be employee resource groups, other peer support groups, or it could be personal therapy. That can just be especially helpful if you have your own secondary traumatic stress, work stress, imposter syndrome, feeling of inadequacy, or if you have experienced a lot of these traumas that the clients are coming in with, and you're over-identifying or it's triggering to you. Having a personal processing avenue like therapy can be really helpful. We like to name that as a resource and support as well.

MW: Some other helpful self-care strategies. There's a few different categories. We'll talk about the mind first. It's really helpful to just focus on what you can control. In this work, we're meeting so many structural barriers and boundaries, but there's only so much we can do. This is an important part of our work-life boundary is what can I control? What can I do today or tomorrow? I can't change this whole system. I can't change everything that this client has gone through.

I want to celebrate small successes. Even if this client is facing a lot of challenges, if you did a small thing, if they made a phone call by themselves, something with their child's school, celebrate that for your sake and for theirs. It really helps you remember, "I was meaningful today. I did do a good job." You can do visualization exercises and you can practice gratitude and mindfulness. Think about ways that you can write down what you're grateful for, you can visualize how you might improve your mindfulness. I won't get into it too much, but these are really important **self-care strategies to try to balance things.**

MW: Next we're going to move onto body. How to take care of your body. You want to exercise, and that doesn't have to be high-intensity workouts, but really moving your body, getting some sunshine, going outside in nature, breathing fresh air. Try to pay attention to your nutrition or your medical health. Not skipping physical exams, not skipping lunch, eating in a way that makes you feel healthful, that is giving you energy, because you have to have energy to do this work. In the same way, practicing good sleep hygiene. How can I get the sleep that I need? Turning off screens at night, making sure I'm going to bed at a reasonable time so that I can show up tomorrow.

Then there's taking care of your spirit. This is a lot of what I saw in that. What makes you, you outside of work? Spending time with friends and family, connecting to religious and spiritual beliefs, and that can be spirituality of any sort. For some people spending time in nature is connected to this. For example, listening to music, practicing your hobbies. I've got my tea cup here, "Do more of what makes you happy." I love tea, and I love this mug as a reminder just trying to feed my own spirit. Again, spending time in nature. These are all ways that we can really take care of **ourselves.**

MW: I'd love to hear from you back on the Slido. What practical resources or strategies would help you manage your workload? That QR code should pop up back here in just a moment, but if you have the Slido open, you should be able to put in your answers already. We'd love to take a moment for you to share with your colleagues on this call. How can you manage your workload? How can you take care of yourself? I'll take a sip of water as staying hydrated is one of my most favorite self-care strategies. All right, so again, these answers are anonymous as they come in. We'd love to hear just even from a few of you, what practical resources or strategies would help you manage your workload?

Taking breaks. Having a to-do list. Wonderful. Prayer. Yes, taking small breaks even if it can't be a big break, I think that's super important. Exercising, don't skip lunch. Yes. Therapy. Leaving work at work. Enjoy reading books. Having a book be the last thing I do every night is a really important way for me to unwind, reading that is. Going for a walk, taking your entire lunch break. Saying, no, that's setting boundaries. Better software, I'll touch on that very briefly. Listening to music, prayer, **stretch, yoga, quiet time to reset.**

MW: I think what's really important to see here is different things are going to work for different people. Just because someone wrote, "Yoga," on here, doesn't mean everyone on this call has to go do yoga but just finding what works for you to help you manage your workload, to help you manage your work-life balance. Coffee, I feel that. Some people don't like coffee, that's okay. Just really think about what works for you and what helps you set your boundaries and refresh in this work. We'll move on in the interest of time on how to advocate for a supportive work environment, because we know that we do this in community and within our organizations.

Try to become a trauma-informed care champion at your organization. What does it mean to take breaks? What does it mean to do this work in a trauma-informed care way? Again, I encourage you to visit some of our other trauma-informed care resources. Jasmine, who's supporting on this call, will be giving a great webinar that's coming up. You want to try to generate buy-in from leadership. Leadership really need to understand that it's important to have a supportive work environment, that your work-life balance is important because you're not able to do this work without them. Having those conversations, finding partners within your agency, who else is an ally in this work, and how can you be a role model and the source of support for others. How can you say, "I'm taking this boundary. I'm showing that I take my whole lunch break, that I don't answer calls." That can be really inspiring to someone else who is struggling with that. That really helps uplift us together.

MW: One way that I advocated for a supportive work environment when I was in the field was I advocated for us to have an on-call system for weekends and holidays. If we said there might be client emergencies, that it's not just whoever that client's phone number they know, or if I have the most clients who happen to have an emergency that weekend, there goes my weekend. To have an on-call line and a schedule that pays overtime for folks who are on call or that's a rotating responsibility, those are a couple ways to advocate, and that's an agency-wide implementation that really helps set those boundaries for everyone and helps everyone meet their own boundaries. That's just one idea.

3. Navigating High Caseloads

MW: Finally, we're going to talk about what it means to navigate high caseloads, some time management, and organizational tools. A really important part is prioritizing needs. I saw this come up in a few of our Slidos. Thank you for already getting the ball rolling. What does it mean to prioritize needs? We need to create a comprehensive to-do list. Figure out what are all the things that are on my plate? Make sure that documentation and certain things don't get thrown under the bus because there's always fires, but then, once you know what your needs are and what your to-do list is, excuse me, we want to apply Maslow's hierarchy of needs.

The idea is here is that Maslow's has physiological needs; air, water, food, shelter, sleep, and clothing are most important. If our clients are not able to meet those, then the next level of safety needs or health needs aren't going to be met if they don't have those really basic physiological needs. What this means in practice is if you have a client whose heat is out and it's 20 degrees tonight, that is a really important physiological need that needs to be tended to before a client's educational issue. That doesn't mean it's not important, but you have to prioritize what's urgent.

The same, if a client is going to be evicted in three days, you have a deadline. It's not a physiological emergency in this moment, but it could become one. That's going to become a priority over other longer-term goals that you're trying to meet with the client. Think about those goals and those deadlines. Really assessing what the deadline is, what the urgency, you're going to have to make tough calls. As long as you have a kind of internal logic about this, you should be able to manage this. If tasks are equally necessary or urgent, you can alternate work times for each one so **making sure you're spending some attention today on this and tomorrow on that.**

MW: You can complete sometimes your easier items first and plan ahead for more time consuming tasks. If you have a short amount of time, you don't have an urgent deadline, try to knock something out that will feel good to get off your to-do list that you know you can get out of the way today. Finally, breaking overwhelming projects into smaller tasks with deadlines. What can I plan out in my calendar or in my workflow that will make sure I can get everything done step-by-step, so it's not this one big thing that's looming with a big deadline.

Managing your time effectively means checking with your manager for workload expectations. My colleagues have put a case capacity calculator, which is a resource we have in the chat, which can help you think what is actually my personal or our agency's case capacity and making sure that I'm not overworked in that way. Considering scheduling 50-minute meetings instead of 60-minute meetings. That's a therapist would do to make sure you have that bathroom break. You can get up, stretch, take a screen break, whatever you need. That can be just really helpful in making your day more manageable.

Scheduling follow up tasks in your calendar. I do this all the time. I set a calendar invite to myself. Make sure to send this email in a week, follow up with ex client and see how they're doing. Use your calendar to really help you get organized, and remember things. It's okay, we're human. We don't have to remember things all on our own. Find a way that makes sense to you to make sure that you know when and how to follow up on tasks. Finally, rebalance your caseload with your supervisor once per quarter. Make sure that your supervisor knows how many clients you have, knows what you're working on. If you've gotten a really high needs case that was maybe unexpectedly high needs that you can meet with your supervisor and say, "Hey, can I get less other cases because this is taking a lot of time and energy?" Make sure that you are working with your manager on these expectations and you're rebalancing when necessary.

MW: Getting and staying organized. You want to utilize to-do lists, which we've talked a lot about, that they're really helpful. I think the act of checking things off is really helpful and also feeling accomplished and getting through the day. You can customize a preexisting template or create your own tracking system or maybe that's something your agency has. This is really where you're going to have to find what works for you. Try different things to stay organized, and use your calendar, as I mentioned. This is my favorite tool. I think it's really helpful. It's easy to remember where it is, and it can send you reminders if that's how you have your calendar set up so that you can keep track of everything.

Finding time for documentation. We all have a lot of documentation. Oh, excuse me. We know that this is really important in our client work. A lot of the questions that came in before this webinar were how to balance this with our client needs. This is a really important question that we have to answer as case managers. One way is to prioritize the tasks within the documentation. Another is to set boundaries with clients because you know that you have to do documentation to stay compliant, to stay ethical to the client. Make sure that you're setting boundaries, even if they don't see that the case notes maybe have become urgent, it's really important for you to stay on top of that. Part of that is scheduling time to follow up on your documentation to make sure that you have it set out in your day so that it's not getting sidelined or really piling up.

Limiting distractions. It can be hard to focus on documentation, so try to put aside your phone, try to not take client meetings or calls, if you can, so that you can focus and just get it done as quickly as you can. As I said, not letting it pile up. It gets more and more daunting the bigger the pile is and using structured templates. What are the case note templates or other resources that we have available either from your agency or from Switchboard, which my colleague Rebecca has shared. Thank you, Rebecca. These are really helpful tools.

MW: One more thing I want to say about documentation is that it's not just a compliance issue or a way that we have to make sure that we're meeting deadlines and staying in compliance with our funders. It's really important to do for ethical case management. Documentation is how we make sure we know what happened in each meeting, when they happened, what clients were saying, what's important to them, what you already discussed, if a boundary was crossed.

Documentation is a way to really center clients' voices, make sure that their goals and needs and desires are being captured. You're not just relying on your memory, but you're making sure they're an active part of their own case management journey. I have a lot more to say about documentation, which I won't because we'll be doing training on this in the spring. I do want to encourage you to look at a lot of our documentation resources, and to think about how you're prioritizing documentation in your workflow, and how you're centering client voices and trying to change some of your mindset around that to not just say, "This is something I have to do, but this is an important part of serving my clients well." I'll leave it there for now, but it is really important to take time to do documentation well and thoroughly using structured templates, not becoming intimidated, not letting it pile up so that we can do everything that's on our plate.

MW: I'd love to hear from you in our last Slido, what strategies do you use to help you find time for the administrative side of case management work? This is your opportunity to share with all the participants here, what strategies help you? I've seen blocking calendar. That's a great one to start with. Requesting work from home if and when that's possible. Absolutely. Setting a specific day for case notes. That was very effective for our agency when we were able to do that or setting aside time on Fridays. Starting early, but limiting time saying, "I have to do it within this time and then I have to walk away." Fighting in a conference room. Seeing a lot of designating time for paperwork. Completing notes after meeting with a client. Not overbooking your schedule. Working from home. Trying appointment free day. Absolutely. These are all really great strategies.

Using paperwork as a break from direct services. Sometimes it can be a nice retreat to be able to go do case notes and not talk to someone and just break up your day a little bit differently. I want to share one blog that I wrote for Switchboard last year on making the paperwork work for you on case management documentation about some of that reframing. We also have a lot of resources that we'll be sharing more in our next webinar, including that e-learning course that Rebecca shared that is ASWB approved for social work CEUs. We'd really love to see you engaging with our Switchboard resources, which are free and accessible to everyone. We'd love to see you engaging with our resource library or asking those questions about how to continue with all of these documentation and boundary setting things. I think that will take us into questions. Thank you so much everyone for engaging in this Slido and providing your great ideas.

MW: I've got a few questions to start us off here from the preregistration and Jasmine will let me know if I'm missing anything. Again, reiterating that we have a lot more resources on our website. They are free and accessible to all. Being a social worker or a case manager is emotionally heavy, especially as an immigrant. Someone wrote, "How do you stop identifying yourself to the people you're working with?" That's a really tough one in terms of setting boundaries. It's really important in our work to maintain empathy and active listening, but we also can't over identify with our clients, even if it's somebody that we really feel for them or it's something that we've gone through ourselves. If you're over identifying or saying, "I should address this because I've gone through it." Try to draw a line, a boundary, and say, "This client is not you, even if they've had a lot of the same kinds of experiences." What makes us different? What different circumstances brought them to where they are or ensure that they will have a different path than you and trying to disentangle yourself emotionally from that doesn't mean you can't be empathetic but remembering that even if you are identifying in what you're seeing, you still have to draw that boundary. That person is not you. They have a different set of experiences.

MW: Another one we got, "How do I manage time expectations with clients showing up promptly to appointments?" That's another place where you really enforce those rules across the board, relying on your client rights and responsibilities. You can say something that's culturally informed, such as, "I understand that time may work a little differently where you come from, that it's not as important where you come from to come on time to appointments, but because I have a busy schedule, if you don't show up promptly to the appointment or communicate ahead of time that you're going to be late, I can't serve you at this time. We'll have to reschedule." There's a way to do that respectfully, while still recognizing that the reason you need clients to show up to appointments on time is because you have a busy schedule, and you're trying to meet a lot of different needs.

How to manage the emotional aspect when clients are panicking because things are really tough? They're scared. I mentioned this. We can empathize with trauma responses. We can validate where clients are coming from, but if we can help co-regulate and stay calm, especially if we know from our experience in the field that there's a way out or that we can support clients by understanding the steps to rectifying an issue, that can really help instead of mirroring the client's anxiety, saying, "I totally understand. I understand why this is stressful. This is some steps we can take. Here's an action plan, and this is maybe why we can take a deep breath and work on this together."

MW: I saw a question about addressing over-functioning for clients or doing too much for clients out of emotion or loyalty. Again, this is where setting boundaries. Clients are going to rely on you if they see that you can do something for them, and you're willing to. Sure, why not? If you stop from the beginning and say, "Hey, it's not because I don't care about you or your well-being, but it's important that you learn to do this because I won't always be here, or this isn't within my role. It's really important as part of our client rights and responsibilities, contracts for you to learn to do that yourself." That's a really important and empowering way to set boundaries to acknowledge client strengths and to make sure that you're helping them build skills to do things for themselves.

The final question I'll answer here is what technology might help you manage cases most effectively? I really want to point you again to some of those case-noting resources we shared. I'm also sharing a Switchboard resource on considerations for implementing new case management software in your agency. That's on an agency level to think about is there better software out there? What are the considerations that might help us do this work better? I'm not going to recommend any specific technology beyond using your calendar and journaling and that kind of thing, but there are a lot of resources to think about what else could help make our work easier and more effective.

Thank you all for all the questions you submitted. We hope now there are learning objectives that you're able to recognize, several common challenges of case management, while identifying strategies to set healthy professional boundaries with clients. Describe ways to improve work-life harmony, including shifts in mindset and self-care strategies, and apply new time management approaches and organizational tools to navigate high caseloads.

Now, we ask you to help us help you. Please scan this QR code or click the link that just came in the chat to access our feedback survey. It's only four questions. It's anonymous, 60 seconds or less. Just really helps us improve our training and technical assistance. I'm going to be quiet for a moment as you all open that link and hopefully fill out our feedback survey.

[pause]

All right. Well, right before time, I want to respect all of your time and end promptly. There are a lot of recommended resources. We've shared some. These are some others about self-care and capacity management. Rebecca has shared them as a PDF in the chat. We will be sharing the slides tomorrow, which this is part of the slides, but you can also download that PDF from the chat. Again, all of our resources are free to use, accessible for all, and we hope these recommended resources will be helpful.

Thank you for committing to creating balance in your work life, to creating balance in case management. Please stay connected. Visit our website, our LinkedIn, our YouTube, or email us. We'd love to hear from you to support your service provision further. Thank you so much.

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