

**switchboard**

# **Client-Centered Practice Fundamentals**

**June 17, 2026**





# Today's Speaker



**Maya Wahrman, LSW, MSW**  
Training Officer, Switchboard



# Learning Objectives

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

## Identify

the purpose and principles of a client-centered approach to refugee service delivery and how it supports both clients and staff

01

## Describe

strengths-based, culturally responsive, and trauma-informed approaches that center refugee clients in service provision

02

## Implement

client-centered approaches to communicating with newcomers, setting service provision goals, and making referrals

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# Client-Centered Approach

Purpose and Principles

01

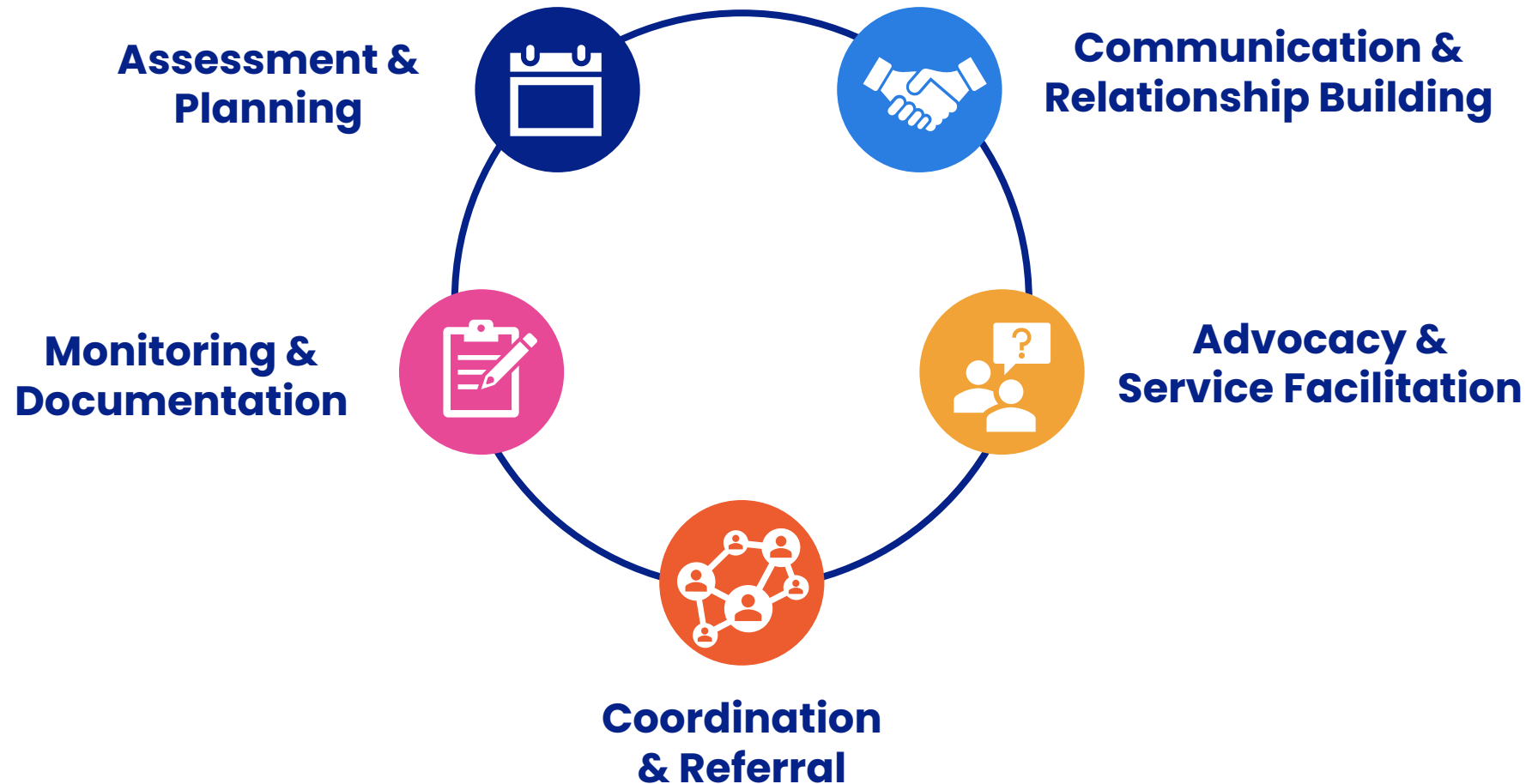
02

03





# Case Management Promotes Wellness & Autonomy Through...





# Phases of Case Management



# Client-Centered Approach

- Focuses on **assessing client needs**, aspirations, and uniqueness
- Honors and respects **autonomy**
- Emphasizes **choice and control**
- **Engages** client rather than prescribes
- **Supports staff** by improving relationships with clients, encouraging safety, empowerment, and sustainability



# Principles of Client-Centered Practice



## Clients have voice

Clients shape their own goals and priorities



## Clients are partners

Staff and clients work together to make decisions



## Clients are individuals

Clients' individuality takes precedence over cultural generalities or assumptions



## Clients are dynamic

Service adapts over time, responsive to client changes and growth





# Timur and Nasrin

Timur and Nasrin are an older married couple from Afghanistan who arrived in the U.S. two years ago. They are still waiting for approval for their Supplemental Security Income (SSI) benefits. They both have chronic health conditions that require frequent medical appointments and ongoing care. You have been working with them for the past six months, and they will be eligible for two more years of services.

Before coming to the U.S., Timur worked as a tailor, and Nasrin cared for their five children, who are now adults with families of their own living across the U.S. and Europe. Their son Ali, who speaks fluent English, was their U.S. tie upon resettlement and lives nearby with his wife and three children.





**What is one client-centered principle to apply with Timur and Nasrin?**



# Diving Deeper to Center Clients

Strengths-Based, Culturally Responsive, and Trauma-Informed Approaches

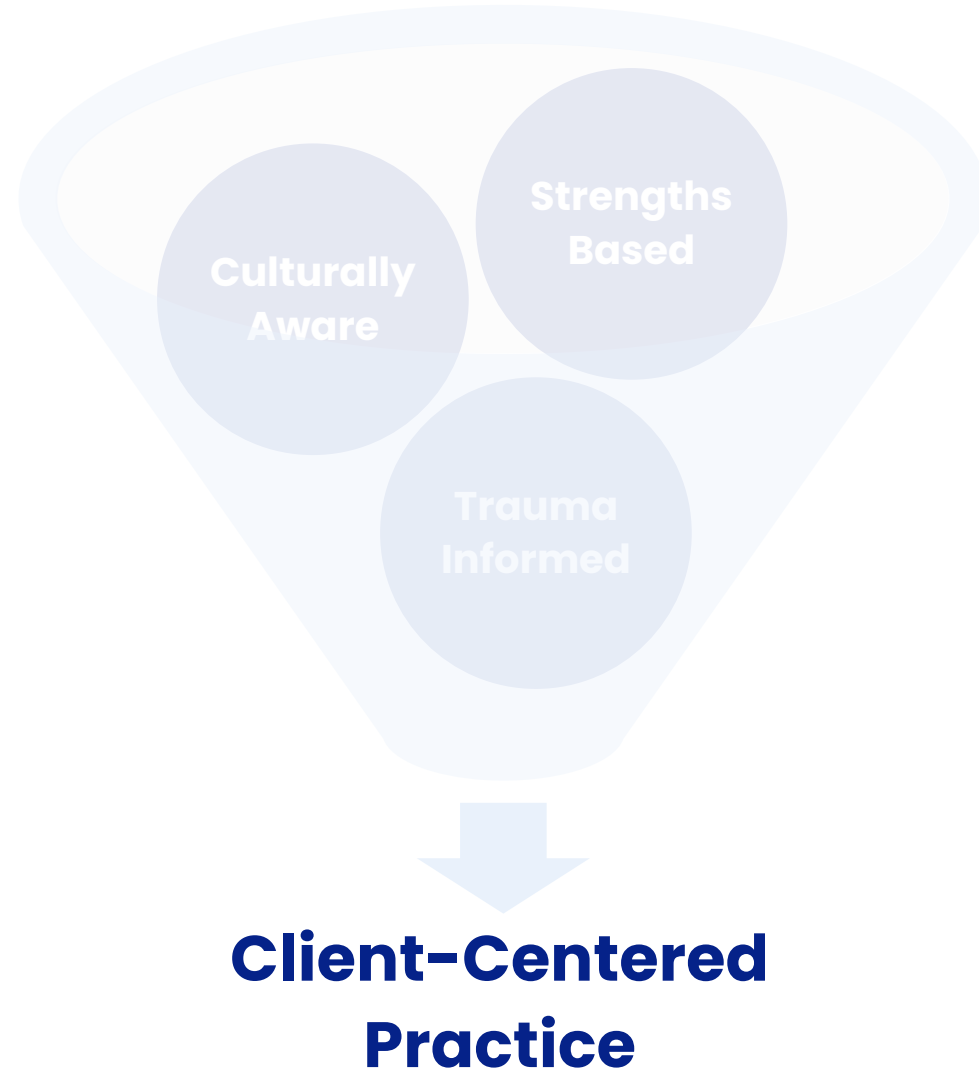
01

02

03



# Interconnected Approaches



**Client-Centered  
Practice**

# Strengths-Based Approach



**All people have strengths and capacity to overcome adversity**



**All people have inherent capacity for change**



**People are the experts on their own experiences**



**People change and grow through their strengths and capacities**

# Why Use a Strengths-Based Approach?



01

## Fosters trust

among service providers, clients, and their families and communities

02

## Helps clients

recognize and celebrate their unique strengths and cultural assets

03

## Identifies and strengthens

supportive networks and community resilience

04

## Promotes goal-orientation

and helps clients identify stepping stones for success





**Share an example of a client strength you have encountered.**

# Tips for Working Across Cultures

- Focus on the individual and establish a **personal connection**
- Educate yourself and **avoid making assumptions**; ask when uncertain
- Find **common ground** and keep an open mind
- Create a **welcoming environment**, considering physical, spiritual, and interpersonal customs and differences



# Consider Shared Culture or Community

If you share a religion, language, community, or other background with clients...

- How does this support your understanding of your clients and relationship with them?
- What might still be surprising or different between your experiences?
- What might be challenging about having this shared background with them?





**What cultural norms or values have you encountered that surprised you or challenged your service delivery?**



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# Trauma: Event, Experience, Effect (3 E's)



## Traumatic Event(s)

- Actual or threat of bodily harm
- May be deeply disturbing, frightening, or life-threatening



## Experience of Event(s)

- What may be traumatic to one person may not be to another



## Effects of the Event(s)

- Emotional, physical, and behavioral reactions that occur after exposure to traumatic events
- Also known as **traumatic stress**



# Triple Trauma Paradigm

Pre-Migration

Migration

Resettlement



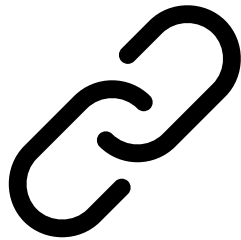


# Trauma-Informed Approach

- Considers trauma's **physical, emotional,** and **spiritual** impact
- Identifies trauma signs in **behavior, relationships,** and **dynamics** and minimizes trauma **triggers**
- Builds **positive, restorative** relationships and embraces clients **holistically**
- Embodies **6 core principles:**
  - Safety
  - Trustworthiness & Transparency
  - Peer Support
  - Collaboration & Mutuality
  - Empowerment, Voice, and Choice
  - Cultural & Contextual Issues



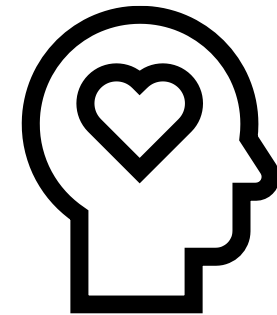
# Benefits of Trauma-Informed Care



**Improves client engagement in services**  
and enhances client outcomes



**Fosters safe environments**  
for all clients and staff



**Improves staff wellness**  
and reduces burnout



# Timur and Nasrin: More Details

Timur and Nasrin speak Dari but never learned to read or write. They did not have access to education as persecuted minorities in Afghanistan.

Timur has long-term physical pain from years of grueling work as a tailor in garment factories and often needs to rest to manage it.

Nasrin has been feeling lonely in the U.S. and has shared that she's frustrated by how difficult it is to find halal meat in her neighborhood. They are both hesitant to use public transportation to reach appointments and services.





# **What cultural factors influence your service relationship with Timur and Nasrin?**



**How might you highlight Timur and Nasrin's strengths and help them leverage those strengths?**



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**Which trauma-informed principle would you prioritize when supporting Timur and Nasrin?**



# Implementing Client-Centered Approaches

Communicating with Newcomers, Setting Service Provision Goals, and Making Referrals

01

02

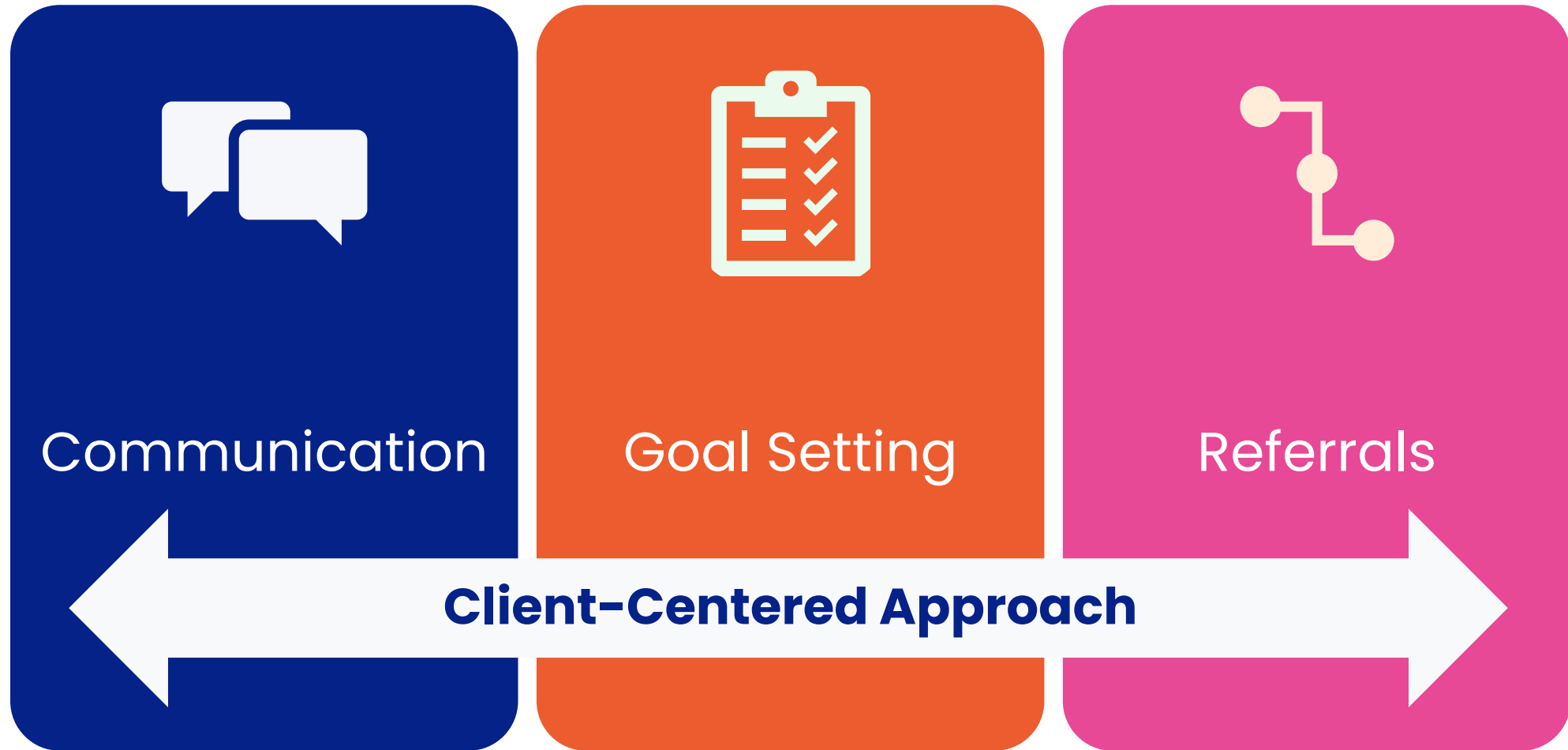
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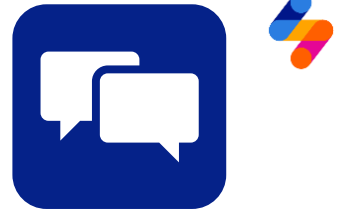
**Name one case management practice you already use that is client-centered.**



# 3 Approaches



# Communication & Active Listening



## Paraphrase

Demonstrate understanding; use client's own words when possible



## Summarize

Clarify conversation and any possible miscommunications



## Express Empathy

Find points of connection; honor the individual client



## Notice Nonverbal Cues

Consider cultural norms, e.g., eye contact, body language



# Communicating Clearly



Explain things clearly and repeat as often as needed.

**Speak directly.**

1

2

**Be transparent.**

Build trust by being honest and open about what you can and cannot do.

3

Explain what clients can realistically expect and on what timeline, and revisit expectations when needed.

**Set expectations.**

# Talking the Talk: Client-Centered Speech Examples



"I understand this process may be uncomfortable or frustrating, but during our time working together, you have shown me your strong work ethic, which can help you take this step."

"You always have choice in what you share or how you participate. I can tell you what is required for you to remain in this program and continue receiving benefits, and you can decide how you want to proceed."

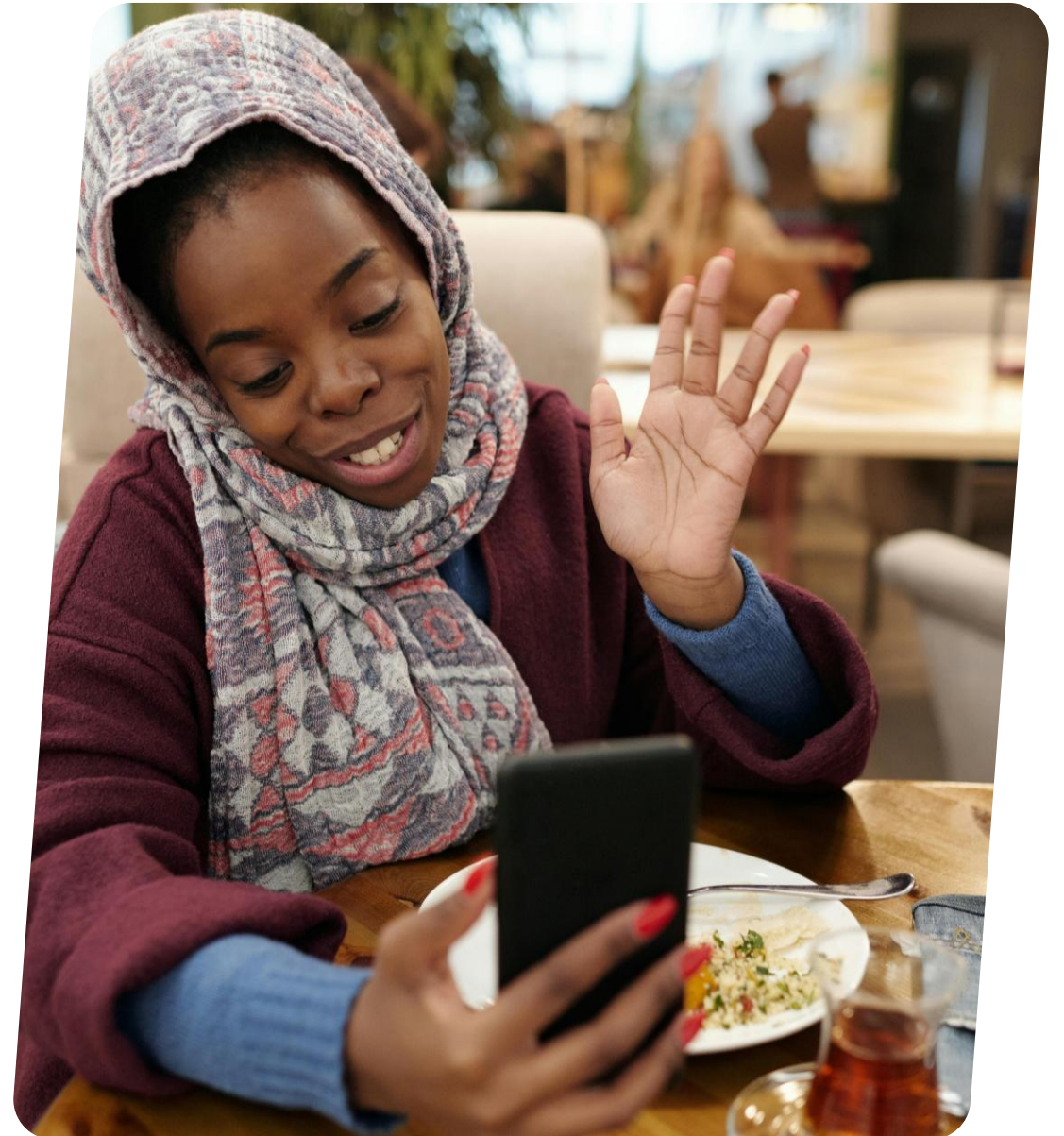
"What are your main goals and hopes for your time as a client here? We can discuss how these align with our program's goals and requirements to support you in achieving them and feeling confident when you transition out of our services."

"Today we're meeting for 45 minutes, and we'll talk about your concerns about our program. If you still have questions after, I would be happy to schedule a follow-up meeting soon."

# Sensitivity in Interpretation



- Identify the **appropriate language** and any **specific dialect** needs of the client
- Explain the **role** of the interpreter
- Reinforce **confidentiality**
- Provide a **framework** for successful interpretation (e.g., explain pauses)
- **Create space** for additional critical information or clarification
- *For more:* explore Switchboard eLearning **courses on [working with interpreters](#)**



# Goal Setting



- **Meet clients where they are at**
- **Prioritize** what goals are most important to them, while explaining **program expectations and guidelines**
- Identify how a **client's needs, values, and cultural background** influence their goals

# Set "SMART" Goals



**S** Specific

**M** Measurable

**A** Achievable

**R** Relevant

**T** Time-bound



# Short-Term SMART Goals



- Keep short-term goals **realistic**
- Balance **program requirements** with the **client's priorities**
- **Review goals** throughout the service period
- **Update goals** as needed



# Long-Term SMART Goals



- Guide clients to **visualize** their ideal future
- Break **long-term goals into achievable and incremental goals** that align with those aspirations
- Help clients **prioritize immediate tasks** and objectives with their future in mind





# How Culture Shows Up in Goal Setting

**Changes in clients' values or family roles can shift their goals**



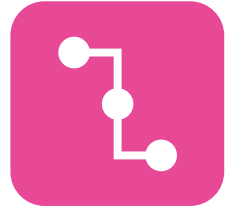
A woman working when it previously was not culturally acceptable

Children speaking English more fluently than their parents

Emphasis on education when it used to be considered a privilege

A man working in manual labor when he was previously an esteemed teacher

# Referral Steps



01

**Assess client needs and referral suitability**

02

**Obtain informed consent**

03

**Validate and normalize**

04

**Explore client's background, culture, and context**

05

**Recognize strengths and empower with choice**

06

**Educate and prepare**

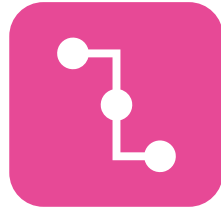
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**Conduct warm handoffs when possible**

08

**Follow up and document**

# Referring Clients Out



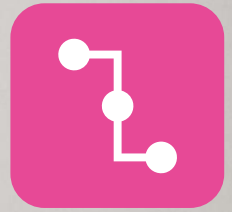
## Guidelines:

- Validate the concern
- Explain your limit
- Provide an explanation
- Offer an alternative

"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 \_\_\_\_.** I would love to refer you to \_\_\_\_ who can help you search for a better job."

"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.**"

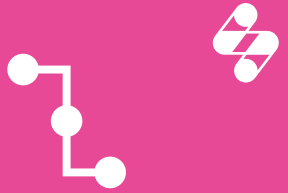




# Warm Handoffs

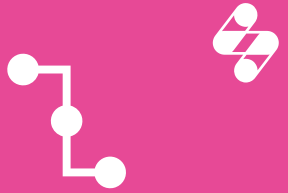
*Directly introducing a client to a new provider (face-to-face or virtually)*

# Warm Handoff Example



Olga, I would like to introduce you to Alice, the social worker at our local health care clinic. While I am here to support your case management needs, if you have health and mental health needs, Alice is your contact! She will always have interpretation in your language, as we have on this call today. What questions can I answer for you, Olga?

# Warm Handoff Example



Alice, please meet Olga. She is our client and will be enrolling in your health navigation service. She is seeking medical services including primary care, dental care, and mental health counseling. She is from Ukraine, and she speaks Russian, so you will always need Russian language interpretation to ensure you can communicate well with one another. Olga, what would you like to tell Alice about yourself, or is there anything I forgot to share?



# Timur and Nasrin: More Details

Timur and Nasrin have been learning English at the local library. They enjoy the classes but do not feel their language level has improved enough.

Their son, Ali, has told you privately he does not have much time to help them manage their medical needs because of his own family obligations, especially when it comes to driving them to hours-long appointments or interpreting for them.

Timur and Nasrin are already very nervous about the end of their services in two years and are not sure how they will survive without your case management support.





**What is one way you might enhance your communication with Timur and Nasrin to support them?**



**What is one new case management approach you might use with Timur and Nasrin after attending this training?**



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# Recommended Resources

- **eLearning course:** [Introduction to Strengths-Based Services \(2026\)](#)
- **Guide:** [Connecting Refugee Clients to the Right Resources: 8 Tips for Effective Referrals \(2026\)](#)
- **Webinar:** [Supporting Others, Sustaining Yourself: Trauma-Informed Care in Action \(2026\)](#)
- **Blog:** [Listening for Change: Applying Motivational Interviewing to Support Refugee and Newcomer Goals \(2026\)](#)
- **Podcast:** [Demystifying Client-Centered Services \(2024\)](#)
- **Guide:** [Trauma-Informed Care: A Primer for Refugee Service Providers \(2023\)](#)
- **eLearning courses:** [Introduction to Working with Interpreters \(2023\)](#) and [Overcoming Challenges in Interpretation \(2019\)](#)



## Connecting Refugee Clients to the Right Resources: 8 Tips for Effective Referrals

As a newcomer service provider, you may not always have enough bandwidth to effectively serve all your clients' needs, or they may require specific support beyond your scope of work or expertise. In these situations, you will need to refer your clients to other colleagues, services, or agencies. This resource provides tips for making referrals with clients to help them feel respected and empowered throughout the process. For more on referrals, see [Switchboard's relevant resources](#), including a [General Referral Letter Template](#) and a [Mental Health Referral Template](#).

- 1. Assess client eligibility, suitability of the service, and any barriers to the client's access.**  
Before talking to the client about the referral, make sure you have enough information about the service, including **confirmation that the client is currently eligible** (e.g., based on age, immigration status, health insurance, or where they live). Confirm the service is **accepting new enrollments**, and evaluate if the client needs assistance **mitigating any barriers** to access the referral (e.g., transportation, language interpretation, cost, digital literacy skills).
- 2. Obtain informed consent and only share client information pertinent to the referral.**  
Make sure you get **informed consent** from the client before making a referral (unless it is to an [emergency service](#) or [mandated higher level of care](#)). Informed consent ensures clients fully understand what they are agreeing to and how their information will be shared. You typically need the client to sign a **release of information (ROI)** to be able to send their information to a referring agency. Only share as much information as is necessary, and be particularly careful with sensitive data. If you want to receive updates directly from the external service about the status of the referral, the client will likely need to sign a reciprocal ROI with the other service.
- 3. Validate and normalize any difficulties the client is experiencing.**  
Reassure the client that it's normal to have difficulty coping or feel uncertain about asking for help. For example, "What you're experiencing is normal for everything that you've been through. Many newcomers feel frustrated, overwhelmed, or sad, or they have worrying thoughts, bad memories, or too much stress because of the challenges of resettlement." Share with the client that many newcomers pursue other services or work with other agencies to meet all their goals. If appropriate and the client consents, offer to connect them with other clients or colleagues who are willing to share about their own similar experiences.

### Example Referral Conversation

"Many people we work with have gone through similar things to what you are sharing. I think it may be helpful for you to speak with a health care professional who can dedicate more time to supporting you through these difficult feelings. It's your choice if you want to meet with them. Would you like me to make a connection?"

# Stay Connected

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