Webinar: Creating Balance in Case Management

March 13, 2025, 2:00 – 3:00 PM ET

Transcript

Introduction

Jasmine Griffin: Alright. Good afternoon, everyone. Thank you so much for joining our webinar today which will be focused on creating balance in case management. I am delighted to introduce our speakers today.

Today's Speakers

JG: My name is Jasmine Griffin. I am a Switchboard training officer with over a decade of experience in mental health, program management, and trauma-informed care. I previously worked with IRC Dallas as Health and Wellness Senior Program Manager and Interim Deputy Director. I hold a Master's of Professional Counseling from Grand Canyon University.

We also have Zainab Ahmadi. She is a Master of Social Work first-year intern joining Switchboard's training team from Binghamton University. For the past four years, she has worked as a case manager for Women for Afghan Women, where she has placed hundreds of vulnerable families in temporary housing. Zainab previously worked with children in school settings, supporting disadvantaged students facing personal hardship.

We also are joined by Sara Dadkhah. Sara is Switchboard's training officer, specializing in case management and capacity building. She has over a decade of experience in refugee resettlement, service provider training, and program development. Before joining Switchboard, Sara held multiple roles at the IRC, focusing on resettlement, program delivery, research, and measurement. She holds a Master of Public Administration from Harvard University.

We also were supposed to be joined by Maya Wahrman. Maya was scheduled to be here, but we now believe that she's in labor, so I will go ahead and skip her brief bio. We're so happy to be here, and we hope that you all enjoy the training today.

Just in case you've missed a Switchboard training or webinar in the past, I want to let you know that our 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 always with all of our sessions, this webinar is open to all refugee service providers across state agencies, resettlement organizations, and partner groups. Please share this opportunity with your colleagues. With that, I'm going to go ahead and hand it over to Zainab to review our objectives.

Learning Objectives

Zainab Ahmadi: Thank you, Jasmine. For today's session, we will first start off with recognizing several common challenges of case management while identifying strategies to set healthy professional boundaries with clients. We will then move on to describing ways to improve work-life harmony, including shifts in mindset and self-care strategies. We will end today's session by applying new time-management approaches and organizational tools to navigate high caseloads.

1. Setting Boundaries with Clients

Poll Question

What is your "why" for doing this work?

ZA: We'll start off with the first section, which is setting boundaries with clients. We want to recognize several common challenges of case management while identifying strategies to set healthy professional boundaries with clients. We're first going to start off with a Slido. You could join us at slido.com with the number 4291301, or through our QR code. We want to ask, what is your why for doing this work? Even with all of its challenges, what keeps you in this field? What makes it all worthwhile for you?

We first have solidarity, which is very true to everyone that is working in this field. Anything that comes to your mind, you can feel free to pop it into the word cloud. If you have more than one idea, you can post that as well. We have lots of different emotions now. We have empathy, hope, supporting community, personal experience. We see that hope is a big word that everyone is in unity with.

Paying it forward, advocacy, inclusion. These are all wonderful words and reasons to be in the work that we all do. Compassion, common understanding. We see a lot of hope, advocacy, making a difference, supporting community. These are all wonderful reasons to be working in the field that we are all working in. I'm seeing that there's so many different reasons, which is wonderful. It's great to see all of the support that we all have for one another, and the unity and solidarity that we have within this field. It really shows why people are working in the field.

We have experience, inclusion, the differences that we may have to come together and serve others, fulfillment, people find it meaningful. We do see a lot of advocacy and hope, wanting change, and making a difference, and helping others. These are all wonderful reasons, and I see that there are still more people typing, so please feel free to add your last and final thoughts. We do see people that just say that they like to help others, which is great. This is a great field to work in if you want to help others.

We can see the common themes throughout, which is wonderful. Loving their community, having shared experiences, that really brings one another together. Empathy is also wonderful, and empowerment. I believe we just have one participant left. You can go ahead and add your idea and thought, and then we can start to-- I believe we still have a few more. Please allow for your last thoughts before we move on to the next slide.

I love that we are all having similar thoughts and ideas, and we really come together in this idea. We can move on now to the next slide. I'll hand it over to Sara.

Challenges in Case Management

Sara Dadkhah: Thanks, Zainab. I'm Sara Dadkhah. It's really touching to see all of your whys for doing this work. Maybe it was the feeling of making a difference, or you care about justice. Whatever it is, hold on to that, because your why is what fuels you. We're going to talk about boundaries, which is what protects you. They make it possible for you to keep doing this work without burning out.

Challenges in case management. A lot of us entered this field, as we said, as we saw in our Slido, to help people. The reality is the job comes with many challenges, whether that's high caseloads, clients with high needs that require a lot of time and support, paperwork, paperwork, paperwork, feeling overwhelmed and underpaid, and exposure to trauma, hearing tough stories day in, day out, are all far for the course in the type of work that we're doing. We spend our days listening to painful stories, witnessing suffering, and doing our best with limited resources. Over time, naturally, this is going to take a toll on us.

Just self-reflect for a second. Have you ever left work feeling completely drained, like you took home the stress of the people that you serve? If so, this is a sign that your boundaries probably need reinforcing.

What are boundaries? Next slide, please.

What are Boundaries?

SD: We talk about these great things called boundaries, but we really need to define what they are. You can think of them like traffic lines on a road. Even though you don't physically see them, they're there to keep everything moving safely. When boundaries are unclear, or when we don't stick to them, things can get messy pretty quickly. Boundaries help us stay within our role, be fair and consistent with clients, and they're there to protect both staff and clients.

Without boundaries, things can get messy. They can get complicated. Clients might start expecting more than we can realistically provide. You might start feeling guilty for saying no. I know that's a very common challenge. You can see that your work might start creeping into your personal life or taking over both mentally and physically in time into your personal time. Before you know it, you can be exhausted, frustrated, and wondering why you're doing this and if you're even making a difference.

Types of Boundaries

SD: Let's talk about the different types of boundaries. There's four big types that we're going to talk about. The first one is professional, which is sticking to your job's role. The second, relational, which is about keeping things professional, not personal, in your relationship with clients. Third, physical boundaries, being mindful of personal space, which can differ across cultures.

Fourth, work-life, setting limits so that work doesn't take over your entire life. We're going to do a deep dive on this one, too. A lot of people struggle with the work-life boundaries the most. You can just think about if you've ever had a client call or text you outside of work hours, you feel like you have to answer, but that's exactly how burnout begins, so something to be mindful of.

Why do boundaries matter? Next slide, please.

The Importance of Boundaries

SD: Thanks. They do a bunch of things, actually, so I might go a little bit out of order compared to the slide. I know some people are worried about boundaries making them seem cold or unhelpful, but actually, the opposite is true, long term. Boundaries help us build trust with clients. When we set and communicate boundaries, they know what to expect from us and they can feel safe. They don't feel like they have to advocate for themselves. They know just what they can expect.

It also makes sure that our clients get a fair treatment. It empowers clients by encouraging self-sufficiency rather than dependency on us. Boundaries protect us from ethical and legal issues, and very importantly, the focus of our topic today is, they prevent burnout so that we can actually stay in this field long term. If we don't take care of ourselves, we can't take care of our clients.

We've all heard the story of when you're in an airplane, put on your mask first before helping others, because it's real. After, or when you start experiencing burnout, you're not able to sustain what's good for you and definitely, therefore, not able to help your clients as well.

Setting, Maintaining, and Reinforcing Boundaries

SD: We've said that boundaries are important, but how do you actually set clear boundaries? Some simple rules that you can follow. Number 1, limit personal sharing. It's totally fine to be human, but think before you share. Ask yourself, "Will this story help the client, or is it just personal information that I'm sharing?"

Next, keep physical contact minimal. A hug might feel supportive, but depending on a client's culture, it could be highly inappropriate. It's always safer to be mindful of personal space. I know many of us have thought through workarounds about, like, put your hand on your chest or bow a little bit, different ways to keep personal space and yet communicate kindness.

Third, be consistent. Clients notice if we make exceptions for them, and word spreads fast. If you're doing a home visit on weekends for one client, others will start to expect the same. I think I may have jumped around, but that's okay. I'll say staying within your role. Similarly, if a client asks you to do something that's outside of your job, it's not only okay to say no, you should say no, because your job is to support them and not do everything for them. You want to empower them and maintain your clear boundaries.

Next, no financial favors. No lending, borrowing, accepting gifts, period. This is a common boundary-blurring mistake which can lead to some serious ethical issues. It's hard to be in a client's house and they're offering you food and drinks, but it's also totally acceptable to blame your organization and just say that you're not allowed to accept these things. Lastly, ask for help. If a client keeps pushing your limits, talk to your supervisor or your colleagues. Others are there to support you.

We often worry about coming across rude, but there's ways to set these boundaries and enforce them that feels respectful and actually makes the client more likely to accept them. Try this formula. You first acknowledge their request. Second, you express the boundary; you set the boundary. Third, explain briefly why you're setting the boundary. I want to put a star by this one. You don't have to overexplain. You just need to give your reason, and it makes it easier for the client to understand and accept, but they don't have to agree with your explanation. Fourth, if you have one, offer an alternative.

We've got some examples here on the screen. If someone asks you a question, you can say, "I hear that finding an apartment is really important to you, but unfortunately, I can't help with that. I'm happy to refer you to someone who can." Another example, "I know that would be really helpful and I wish I could do that for you, but my job is to focus on X, Y, Z. Let me connect you with the right person."

Both these examples, you can see, we didn't actually do all of them in each one, but you acknowledge it, you empathize with the request, say what you can and can't do, and then offer an alternative if you have one. Again, pro tip, blame the agency because we're following rules, and I've often said I can't accept this, otherwise, I could lose my job.

How do you enforce boundaries even when clients push back? First, I'd suggest giving reminders. Repeat the boundary. You can repeat the same messaging each time, be a broken record, because using consistent messages actually helps reinforce the idea. It's actually very powerful if you can stay calm while doing this. Even if the client is upset or has a sense of urgency, you don't need to jump to their level of emotional arousal. It reinforces that this is business as usual when you're giving that response.

We provide referrals whenever possible. You can seek support from colleagues and supervisors. It's a good idea to document and follow up on any boundary crossings. The more clear and steady that you are, over time, the less people will test your boundaries.

Addressing After-Hours Client Needs

SD: After-hours requests. One key way to handle these is to use a strength-based approach. All of our clients have strengths and capacities to overcome adversity. They have been through a lot to get here with us. Recognizing this and celebrating these strengths and assets helps empower them to do a lot of work and not be as reliant on us. We suggest having an after-hours plan and making sure that the clients know what resources are available. You might let them know in advance, "Don't call me, but you can call Jasmine after this time." You're welcome, Jasmine.

Then secondly, you want to assess the urgency carefully. Not every request is truly urgent, even if the emotion that's being presented with is high urgency. We'll touch on this again a little bit later on, but it's possible to validate their urgency and their feelings while still processing their requests in a routine manner.

Lastly, stick with your work schedule and professional boundaries. Exceptions could be interpreted as expectations. You want to be upfront about your schedule and stick with it. To just summarize boundaries, boundaries aren't about being unhelpful. It's about making sure we can do our job well and do it long term.

2. Improving Work-Life Balance

Maintaining Work-Life Balance

SD: Now, the work-life boundary piece that is so difficult for many people. Our jobs are meaningful to us, but we feel overwhelmed with the emotional demands and the never-ending to-do list. Let's discuss some practical ways to be able to balance the load, manage our stress, and not burn out. I want to start with the question of how much of your identity is tied to being a case worker or case manager. Just take a sec to think about that.

It's easy to wrap our whole sense of self around our jobs, especially when we deeply care about our work. When our job becomes our entire identity, it makes setting boundaries much harder. Actually, can we jump to the next slide and think through, right now, what else makes you you. Thanks. Go ahead, Zainab.

Poll Question

What are some aspects of your identity outside of work?

ZA: We wanted to ask you all what are some other aspects of your identity outside of work? This could be a mother, daughter, son, gardener, soccer player, a good friend, anything that makes you you. We have parents, mothers, grandmothers, a friend, a reader, pastor's wife, therapist, runners. We have lots of different activities, whether it's through family, friends, through religion, through art. A teacher, a trainer, a caregiver, a parent to a pet, an individual, a best friend.

We see that there are so many aspects to ourselves outside of our workplace. Beyond being a case manager, there are so many things that make you you. You can go ahead and add more into the chat. There are so many different ideas, whether it's a student, a veteran, soccer enthusiast, these are wonderful things that I'm glad you are all taking part in outside of work. It's great to have an outlet.

SD: This is wonderful. I'll chime in. I'm a daughter, I'm a sister, a parent, a cat parent also. You might see her come through. If we could jump now back to the previous slide, this, all that we're saying right here-- Please keep answering on your slide. We'll share the results later. All of these are about making that mindset shift, that keeping your whole identity in mind helps you create balance and prevents your work from taking over your whole life. That's the first bullet that we're talking about.

Then there's a bunch of concrete, I want to say easier; none of these are easy, but easy strategies to improving work-life balance, one of which being sticking to your work schedule. Staying late might sometimes feel necessary, but making it a habit will lead to exhaustion. A tough one. There's avoiding checking work emails or messages outside of work. Seeing a stressful email right before bed, you might sleep less well and be less charged the next day. Trying to limit when you expose yourself to work can be an important boundary to set.

You should also look for role models in your organization who maintain good balance, and learn from them. I know, personally, seeing leadership in my organization actually sign off when they say they're going to sign off and not answer emails on the weekends has helped me feel, no matter what they say, I watch what they do. That has helped empower me to do the same. Also, advocate for yourself. If your workload is too much, talk to your supervisor. You don't have to shoulder it all alone.

What's really, really helped me personally is to use my calendar for more than just work meetings. I will schedule time for my paperwork, for my lunch breaks, and personal time, including picking up kids from school or walking with a friend. If I don't plan for it, it's really easy for my work to take that space over, so I'll just block it off.

Then next slide, please.

Transitioning from Work Mode to Personal Time

SD: How do you shut off work at the end of the day? Even when we leave our offices, our minds don't always shut off. Here are some practical strategies that we can use. Write down any lingering tasks before you log off or before you leave your desk. Getting them out of your head onto paper will help you trust that it will be there for you tomorrow, and you don't have to keep holding it in your head overnight.

I've heard from many people that it's helpful to have a transition ritual, which can look like-- Someone told me when they drive home, they notice a landmark always. When they see that landmark, they tell themselves, "I'm not going to think about work anymore. When I see that McDonald's or whatever it is, I'm done with work, I'm switching into home mode." This could also be strategies like touching your front door as some ritual for yourself to know that work is over, whatever's important to you.

Working remotely can be very tricky because your home life is very, very close to your work life. Maybe even a ritual is more important there. Some people tell me that they change their clothes after a day's work, or they take a shower after as a way to signal the shift.

I love going for a brief walk, super brief, maybe just even around the block once, just as a way to reset. Moving your body and doing exercise has many benefits. There's some research; I think the author is Nagoski and the name of the book is *Burnout*. It talks about how we hold stress, and you need to go through a whole exercise cycle to release the stress. I'm happy to share that book information, but it's for a deeper talk than today.

Identifying Resources and Support

SD: Burnout doesn't just happen because of too much work. It also happens when we don't have enough support. Where can you turn? Obviously, your colleagues are a great support system, but it's tricky. You want to be mindful not to over-rely on each other and overwhelm them as well. Supervisors should include emotional support. It's not just for tasks. Bring it up, but if your supervisor isn't really helping, you could seek other professional mentors in your workspace.

It very much helps me to feel competent and confident in my expertise. Just to plug Switchboard as an example, there's lots of resources available so that you can tool up and really learn more. Just having that confidence will reduce your stress, and combining both community and resources communities of practice, like those offered by Switchboard, connect you with others in the field who can understand your challenges.

Lastly—thank you for that link—personal therapy can be helpful in addressing secondary traumatic stress, work stress, imposter syndrome, you name it. Many case managers have their own stories of forced displacement as well. If not properly processed, they can be re-triggered by doing the work that we do. Talking about this work with a therapist can be beneficial and improve experiences.

Helpful Self-Care Strategies

SD: Self-care. I have a lot of thoughts on self-care because you hear this term a lot. I strongly believe that real self-care isn't about spending money. You don't need to buy fancy skincare products or go on an expensive vacation. Real self-care is about making choices, and often hard ones, that sustain you in your work and in your life. We can think about it in these three categories.

First of all, mind. It helps me to focus on what I can control. There's a lot going on right now that I can't control. Being able to just, I want to say put my head down and focus on what I can do is helpful. Celebrating small wins. People also report success with visualizations, meditation, and gratitude.

Secondly, but definitely, definitely important is your body. Make sure you get enough sleep, you move regularly, you eat well. Do not overlook the basics of taking care of your physical body. Third, spirit. Stay connected with people and activities that bring you joy. This can be listening to music, spending time in nature, whatever nourishes and recharges you emotionally.

While for some people self-care might be eating a special treat, great, but think about it a little bit more about where can you really stick to boundaries that protect you and sustain you in the long term. We've talked about some self-care strategies. Zainab, can you help us explore some more?

Poll Question

What practical resources and/or strategies would help you maintain your workload?

ZA: Thank you, Sara. We know that self-care is not the only answer to managing the heavy workload of being a case manager. We'd love to hear from you. What practical resources or strategies do you think would help you manage your workload? If you could just log back into the same Slido and we can see what everyone thinks. We start off with art therapy, which is a great outlet and strategy to maintaining workload. We have preparation, meditation, therapy, services. We see a lot of people joining in on therapy, which is a great resource.

Good sleep, journaling, taking walks, different activities such as yoga, music, exercise, cooking, these are all great resources and strategies that you could use. These are all easy for everyone to do. Nothing is necessary to take part in these activities. We do have a lot of unity with walking and singing, music, therapy, cooking, spending time with families. These are all wonderful ideas. You can please go ahead and add any thoughts that you have because this will be shared afterwards as well. Any non-work events that you'll look forward to, those are always great to have in mind. Watching TV shows as an outlet. Lots of different ideas, and lots of things that we share with one another. I think we can move on to the next slide.

SD: Thank you. Really cool to see people's different self-care strategies. I'm trying to get into gardening. Maybe next webinar, I'll report back. I also want to go back for a second. We've received some questions about how to set boundaries in a firm, but kind way. Just to give you that formula again, and we can talk about it in Q&A. You first validate the concern or the emotion behind the request. You don't have to agree with it, but you just say, "I hear you saying this," or, "I see that you're upset." By identifying and naming what they're going through can really be disarming or satisfying on the receiving end.

Second, you set your boundary, you express that limit, like, "I can't help you with this," or, "I can only answer your question during work hours." Third, you provide an explanation for the limit, which it can be—it's clarifying or reiterating your role. Fourth, you offer a referral or some other choice, if that's an option. For example, "I can't take care of that for you, but I know that XYZ organization handles that.

Would you like their phone number?" Thank you.

Advocating for a Supportive Work Environment

SD: Advocating for a supportive work environment. Self-care is critical and we all have to do it, but it's not the only answer to supporting staff. Obviously, workplaces need to be supportive as well. Even if you are not in leadership, you can help build a supportive work culture. Some of these strategies include being an advocate for the issue in which it helps to bring facts and research forward to share with your team, and raising awareness by talking about the issue with your supervisor or in team meetings.

Becoming a trauma-informed care champion can be very powerful. I think we have a link to more information on trauma-informed care management. You can partner with HR to develop a healthy supportive work environment for staff, as well as advocate for change broader than just your team.

What I think is the most important is to be that role model, that first source of support. Model that healthy work-life boundary for others, work your scheduled hours, take vacations, engage in healthy fun activities outside of work. Provide peer support. If you have resources for self-care, some information, share that. Basically, do your part to foster a calm and supportive work environment.

3. Navigating High Caseloads

Prioritizing Needs

SD: We've talked so far about boundaries and we've talked about work-life balance. Now, let's talk about navigating high caseloads. We need to acknowledge that we're in an interesting time right now. Shifting policies and many unknowns are triggering stress in a different way than just having high caseloads in the past. In this segment, we're going to talk about strategies for prioritization, organization, and documentation that will help make your workload more manageable.

Prioritizing. One of the biggest challenges, maybe the biggest, is prioritization. When you have limited time, how can you balance the need for client services and documentation at the same time? A good first step is to start with an overall to-do list. Write down everything that you have on your plate. Some people like this in a physical notebook. Some people like this electronically. Some have case management systems to handle prioritization.

Once you have that master list, prioritize using- I like to use Maslow's Hierarchy of Needs, which I don't have that visual, but many of you have seen it. It's a pyramid that lists basic needs at the bottom, like food, water, safety. We might have a link to it, actually, so you can just get the visualization. The main idea is you can't advance on these stages of needs until your basics are met. Once you have food and water, then you can start worrying about higher-order concerns.

Same goes for when you're assisting your clients. First, address those physiological needs. Next, focus on safety. In the case of your clients, these can include eviction notices, employment concerns, medical concerns. Just some examples, because I think examples are super helpful. If a client's heat is out and it's going to be 20 degrees tonight, that's a priority. That's a safety concern. If a client receives an eviction notice and then there's three more days for them to pay their rent, that's safety too, but actually not as urgent as maybe getting food for tonight.

It's difficult. You also have to think about the deadlines and balance those as well, which again, it's a lot of complex work, but we're trying to simplify it down to basic needs, safety, and then move on to some of these higher needs because you're going to get a sense of urgency from your clients that isn't always a good representation of what's important.

I'll repeat that. A client might come tell you, "This is urgent. You need to drop everything," but you personally need to evaluate how urgent is this and how important is this. For example, a client might say, "I need help replacing my lost bus pass," but you can then reassure them that, "No, I will help you during these times," or, "So and so can help you" because you're dealing with some more urgent needs, for example.

Then, once you've handled the most important and urgent needs, or once things are equal, it helps to approach and solve the easy things first. Go to the low-hanging fruit. Once you start checking a few items off your list, it feels good to have that sense of accomplishment. Then for the remaining tasks, schedule them.

If something isn't urgent, but it still needs to be done, add it to your calendar so that it doesn't get lost. For larger or overwhelming tasks, it really helps to break them down into smaller steps with deadlines. This can avoid procrastination. For myself it makes bigger projects just feel more manageable.

Managing Time Effectively

SD: Managing your time effectively. We know there's not enough hours in the day to meet every client's need every month. As we've said, prioritization is key. Also, we recommend, check your agency's direct service hours expectations. Many caseworkers are expected to do, for example, 15 to 20 hours of direct service per week. If you find that you are consistently doing more than what your agency has said is the norm or is the average, bring that up to your supervisor. It's worth examining.

Another tip is to, instead of using full hour meetings, schedule 45-minute ones or 50-minute ones. That builds in this little 10-minute buffer where you can write notes, grab water, prepare for the next meeting. It's helpful to do tasks right when they're fresh. Another one, schedule follow up tasks immediately. For example, after meeting with the client, block off time in your calendar to complete the referrals, applications, any follow-ups that you've been discussing. Make time for documentation. Just like direct service, it's not going to happen unless you plan for it.

Very importantly, rebalancing your caseload with your supervisor, it's suggested on a quarterly basis, for example. Many times, your number of clients isn't the right metric to use. Some clients have high needs or significant trauma histories that require more time. Having a mix of high and low intensity cases can ensure that you're able to meet everybody's needs within a standard work week.

Getting and Staying Organized

SD: Of course, organization is key to keeping up with high caseloads. Since every program has different documentation requirements, creating tracking systems that work for you is critical. I would ask yourselves, what information do you need to see at a glance? What helps you remember upcoming deadlines? What system feels easiest to maintain? I've come up with so many systems that I just don't maintain, so that's important. What will you actually stick to?

Some caseworkers like using a Word document or an Excel spreadsheet with the client's name, service plan goals, and deadlines altogether. Other caseload trackers might have client name, service plan and goals, pending tasks, deadlines. I'm seeing in my notes, I've written that I never did this, but color-coded systems to highlight urgent versus non-urgent needs. It doesn't have to be high tech, basically. You can do this with a pen and a highlighter.

A special note with data security. Make sure you shred anything with client information after you use it. If you're using an online platform, be really mindful of the information that you're putting in there.

Some of the online systems that people recommend are worth exploring, Trello or Asana. I've heard good things about Google and Microsoft's free products as well. Things to explore. Above all else for myself, the calendar. I always go back to blocking things off on my calendar to make sure that I've allocated my time in a way that allows me to stay organized.

Next slide, please.

Finding Time for Documentation

SD: Finding time for documentation. Fitting in your case notes is, for many of us, the biggest challenge in time management. As we've talked about, you want to prioritize your tasks, focusing on what's most important each day, being mindful of that, and setting boundaries with clients. We talked about that.

Third, schedule time for those notes. Block out the times on your calendar and this could be highly effective. Many people also, if concentration is an issue, which it is for me, they set a 15-minute timer and write as much as they can and that 15 minutes, and then give themselves a little bit of a break. These short bursts can be, really, a effective strategy for maintaining your attention.

Limit distraction. Office environments can be really busy. Home office environments have lots of noise as well. It helps to close your door and put a Post-it saying no interruptions unless emergency, or wearing headphones to minimize distractions. I have turned off notifications on my phone for news, even text messages. I just check them during certain times of the day because I don't want to let someone else control my attention. It's been a weird shift for me, but it's helped me be a lot more productive.

Try to stay consistent. When it piles up a little bit, it can be really disheartening. As much as you can, do a little bit each day to chip away at the work. Of course, you can't always be perfect, so have self-compassion when you don't. Lastly, use templates wisely. A lot of the work that we do is, I don't want to say routine, or has repetitive aspects to it. If there are ways that you can streamline, be smart about it. Make yourself some templates that you can customize for each client. Zainab, can we learn what other strategies people have to share?

Poll Question

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

ZA: Yes. We have one last Slido if you could join us once more at slido.com or through the QR code. Our question is, what strategies do you use to help you find time for the administrative side of case management?

We have case-note as immediately as possible, which is a great strategy to always have. Calendars, as Sara had mentioned. Taking your remote day is important for self-care. Notion app to track of tasks, and scheduling everything, as well as having-- A big one we see is setting reminders. It's very important. That also goes along with the calendar so that you know what you need to do each day, and you block time in your schedule for every activity that you have.

Then we also see things such as sticky notes, copying and pasting templates to make things easier. We see a lot of calendar and setting reminders, which is wonderful because those are really good strategies to use and to have everyone in the team use those. You can go ahead and add more into the chat, whatever ideas that you may have. It would also be useful for everyone else to be able to see these and be able to use these in their work as well.

SD: These are super helpful. Sometimes they seem simple, and the hardest part is just being consistent about them. I love all the ideas that are being shared.

ZA: You can go ahead and add any last ideas that you have because these are all really wonderful and great to work with.

SD: To sum up this section, managing high caseloads is definitely tough, but these small changes do make a big difference. These include prioritizing clients according to Maslow's Hierarchy of Needs, or whatever system you use to prioritize, using time blocking and adjusting that- adjusting your meeting lengths, creating an organizational system that works for you using whatever tech platform or pen and paper, and scheduling time for documentation to prevent backlog and pile up. You don't have to do everything, but having a plan helps.

With that, I think there's probably a lot of questions and strategies we can discuss. Jasmine, can you walk us through, please?

Q&A Panel

Jasmine: Sure. We are now at the Q&A portion of the webinar. We've received quite a few questions and so I've been going through and queuing up some for us to answer. The first question is—

How can I more efficiently meet all my documentation requirements?

JG: I chose that one because of what we just were discussing with the Slido. They were asking about are there free platforms or software.

I won't get too much into that just because every agency has their own platforms that they typically use. I would suggest coming up with a routine that works best for you. I can use myself as an example, thinking back to my case management days, when I was a caseworker. I would start my day with completing the documentation for the previous day. There are caseworkers that I know that they would end their day with documentation, or they would wait till Friday.

Personally, I couldn't remember what I did Monday on Friday, so I would always just start my day with what I completed that previous day. The key to any time that you set aside for documentation is just to ensure that you honor it and that you ensure that your colleagues are honoring that time as well, and so making sure you're blocking off that time and sticking to it.

Let's see. Someone asked—

For a case manager serving youth in schools, can you offer advice on how to best approach short-term services?

JG: When it comes to this type of question, the first thing that comes to mind for me is transparency, expectations, and going back to setting those boundaries.

From day one, saying to the client, "Our time is limited to three months, so we will be closing out services mid-June. I'll remind you throughout this process and help you prepare and ensure that you're equipped with all that you need so that you can move forward without me." Just setting the tone for the client and those boundaries in the beginning so the client knows I'm not here forever, this is a short-term thing, and you don't need me. I'm here to guide you and walk alongside you, and then I'm sending you on your way.

Zainab, we have a question about when meeting with a family. The person is asking—

How do you ask to meet with Mom only without Dad's presence?

ZA: Of course, thank you, Jasmine. First, I would see if the mother is comfortable, then maybe we could request a private conversation if we see that that is a fine way of doing so. If not, we can also look into scheduling a separate meeting with the mother, arranging a follow-up appointment with just the mother alone at a different time or a different location if that's what the mother needs.

We could also try using a pretext such as topics that are specifically relevant to her, which could be parenting resources, services for mothers, or having a woman's program. These are all ways that we could separate the mother and then have time to speak with her.

JG: Awesome. Thank you. We have quite a few questions come in. I'm just reading through some. We had a couple comments and questions about supervisors that I just want to address very briefly.

What should we do if the supervisor is not supportive or knowledgeable about their job?

JG: First, I just want to apologize. I'm just really sorry to hear that you may not have that supportive supervisor in your back pocket. I want to just encourage you to advocate for yourself and your needs. This can look like asking your HR or your people team for advice on how to handle that situation, or maybe even talking to some of your coworkers or colleagues to see how they approach or interact with that particular supervisor. I would love to dig into that deeper, but without proper context, I will leave it there.

For supervisors who may be on the call, I just want to encourage you to shadow your staff and spend time with your caseworkers, maybe a new caseworker each month, or some rotation that is reasonable for your time just to better understand and gain some ideas on some of the pressure points that they may be experiencing in the field. We have really great resources on our website about being a trauma-informed supervisor that I encourage you all to check out as well.

SD: Jasmine, can I just jump in too?

JG: Absolutely.

SD: As a last ditch, if you're really seeing that you don't have the support in your team, I really advise you to find a community of practice and get that support from others who are in your position, maybe at other organizations.

JG: Absolutely. Sara, I'm going to bounce a question to you.

What strategies do you use to ensure that clients understand and respect boundaries?

SD: That is a wonderful and tough question, and I never do this perfectly. I guess it goes back to one of the answers you gave a moment ago, Jasmine, where it's like, I try to be fully transparent early on about what you can expect from me, what you can't expect from me, but this is like the time limit of our service. This is what our service does contain and doesn't contain, and with frequent reminders. Even with that open and direct communication, clients don't always understand it. It might be very different than what they've been used to, or just not what they want to hear.

I suggest open frequent communication. At the end of the day, it almost doesn't matter- that's a harsh way of saying it, but you try your best to explain the rules to your client or whoever you're serving, but you can only control you and your actions. Even if your client continues to expect you to serve them after hours, you not responding, you walking the walk is one very firm way of communicating a boundary. Does that answer the question, Jasmine?

JG: I think so. That's great. Thank you so much, Sara. Let's take a look and see what we have.

SD: So many great questions. Keep them coming.

JG: So many, yes.

SD: Keep them coming. We'll compile and find answers for ones that we haven't been able to answer during this webinar.

Tips on how to respond or react when a client shares a traumatic story or fear?

JG: It's a really great, great question. I think what's important here is to sit with your client. You don't have all of the answers, and so when your client is telling their story, just listen. You don't have to respond. Sometimes not responding and just being present is the best response for some clients. Sara or Zainab, do you have anything you want to add to that?

SD: I'm looking towards Zainab for more insight here.

ZA: I think you really covered it, Jasmine. Thank you so much.

SD: We can't possibly be everything to everyone, and so don't underestimate, like you said, just being with somebody. Even if you have the answer, sometimes not solving it and just being present with somebody is a lot more helpful.

JG: Oh, a really great question just popped up.

What if someone is your friend and enrolls in a program that you work in as a client? How can you set boundaries?

JG: I think this is a really great question because this came up in my previous role a few times. As the caseworker or even as the supervisor, if you know that you have a friend enrolling into the program, it's very important to notify management so that they're aware of that and can lock certain features, whether it's in your documentation portal so that there's no sharing of information.

Then with your friend, just letting them know so and so is your caseworker. I am not your caseworker. I cannot discuss. I'm not at liberty to discuss what you have going on with your case. This is one that I would absolutely encourage you to loop in your supervisor and ensure that everyone is aware that you have a family member or a friend being enrolled into the program. At times, I have also seen where an agency will decide to not enroll that client and send them to another agency just to avoid duplication of services.

ZA: I'll just jump in, Jasmine, that as Sara said earlier in the second section, that you could just blame it on the organization and say that these are the rules of the organization and you cannot go against them for everyone's safety.

JG: We had a couple questions also on some case notes. Someone asked—

What information should not go into case notes?

JG: Quickly answering that, I would say your personal opinion should not go in case notes. Stick to the facts. Use quotations when stating things that the client actually said in your case notes. We'll get more into this in part two of our training series that's happening on March 27. Please be sure to join us at that time where we'll dig more into documentation and expectations around that.

We are going to go ahead and move on with just five minutes left in our webinar today.

Conclusion

Reviewing Learning Objectives

JG: We hope that you are now able to recognize several common challenges of case management while identifying strategies to set healthy professional boundaries with clients. We hope that you're able to describe ways to improve work-life harmony, include shifts in mindset and self-care strategies, and to apply new time management approaches and organizational tools to navigate high caseloads.

We would love, if you just took a few minutes to complete our brief survey. If you can scan the QR code, the link is also going to be in the chat. We would love to get some feedback from you all so that we can continue to grow and help you the way that you need. We'll give you just a few minutes to complete that. This link will also be in the follow-up email that you'll receive, along with the slides. There are quite a few people who asked about that. We will be sharing the slides out and the recording.

Recommended Resources

JG: Here are some recommended resources that we believe will add value to your learnings. After today, you'll receive links to these. They'll be in the chat as a PDF, and then they'll also be in the follow-up email. Really hope that you take advantage of looking over some of those.

Stay Connected

JG: On that note, we just want to thank you all so much for joining us this afternoon. If you can, please stay connected with us. We look forward to continuing to serve you. Again, if you can complete that survey for us, we'll be very, very grateful. We hope you all have a wonderful afternoon.

SD: Thank you.

ZA: Thank you so much, everyone.

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