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Welcome to Module 2, Professional Responsibilities, of DBHDS Support Coordination/Case Management Training Modules.

Slide 2



Introduction

Supervision

Professional Boundaries

Dual Relationships

Self-Disclosure

Avoiding Burn-out



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The topics covered in Module 2 include:

- supervision;
- professional boundaries;
- dual relationships;
- self-disclosure; and
- avoiding burnout.

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Objectives

- Understand the Importance of Supervision
- Recognize How to Establish & Maintain Professional Boundaries
- Understand the Principles of Dual Relationships
- Understand Self-Disclosure
- Identify Ways to Avoid Burn-out



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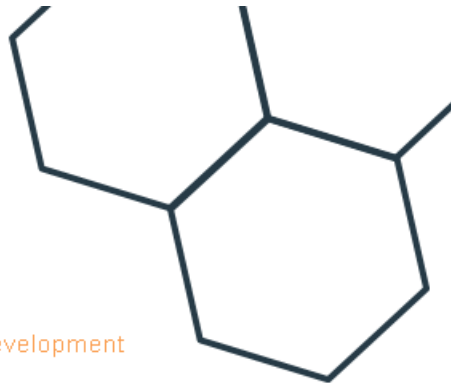
The objectives of this Module include:

- understand the importance of supervision;
- recognize how to establish and maintain professional boundaries;
- understand the principles of dual relationships;
- understand self-disclosure; and
- identify ways to avoid burnout.



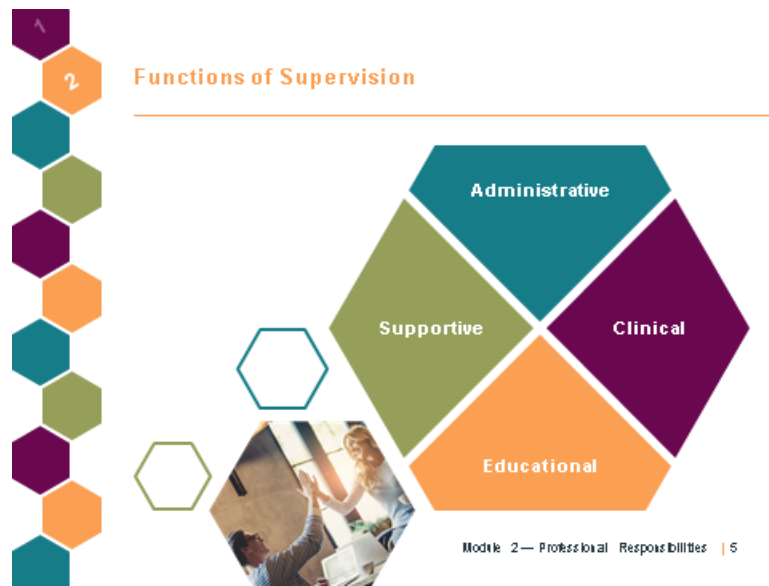
Supervision &
Professional Development

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The Support Coordinator/Case Manager supervisor is a key resource for continued growth as a professional.

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The Support Coordinator/Case Manager supervisor is responsible for four functions. They include:

- administrative functions;
- educational functions;
- supportive functions; and
- clinical supervision.

Administrative functions include hiring and orienting new staff, assisting and coordinating work, monitoring and evaluating performance, facilitating communication in organization and sharing organizational values.

Educational functions include providing and coordinating both informal and formal training. Supportive functions include supporting staff, cultivating a sense of teamwork, sustaining morale, building commitment to the agency mission and goals, helping create and maintain an environment that is conducive to provision of quality services to those served.

Clinical supervision includes review of the status, progress and /or issues for those served results of record audits, identification of resources, and clarification of regulations and requirements.

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Using Supervision

- Support & Guidance for Challenging Situations
- Receive Constructive Feedback
- Get Individual Support



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Learning how to use supervision will help ensure the success of a Support Coordinator/Case Manager. Support Coordination/Case Management is challenging and sometimes stressful. Supervision can be used to:

- receive support and guidance for challenging situations;
- receive constructive feedback about the Support Coordinator/Case Manager's work; and
- get individual support.
-

It is important for a Support Coordinator/Case Manager to increase and develop their knowledge, skills, and abilities over time. Utilizing supervision regularly will allow the Support Coordinator/Case Manager to receive feedback, suggestions, and constructive criticism.

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Learning More from Supervision

- Discuss Possible Interactions
- Role-Play
- Observe Peers
- Problem Solve the "What If"
- Review
contrast your progress notes and other Support Coordinators/Case Managers
- Know Your Limits
- Manage Your Time
by organizing your tasks
- Understand Your Responsibilities




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How can a Support Coordinator/Case Manager learn more from supervision? He/she can:

- keep the supervisor aware of evolving situations that may result in harm or risks of harm to those served;
- be prepared to review status, progress and concerns for those served;
- discuss possible course of interactions before and after meeting with a person served;
- use role-play to rehearse techniques, skills, or approaches to use when working with a person with a disability.
- observe a peer model a skill or technique;
- problem solve ways to handle various "what if?" situations;
- review and discuss the progress notes of other Support Coordinators/Case Managers;
- be prepared to discuss productivity, barriers to meeting targets for their productivity and/or conducting timely face-to-face and monthly contacts;
- interpret organization and/or regulatory requirements; and
- discuss responsibilities and understand how to prioritize/manage time to complete all tasks.

It is important for each Support Coordinator/Case Manager to know the limits of their knowledge and skills. When in doubt it is important to always talk with a supervisor.

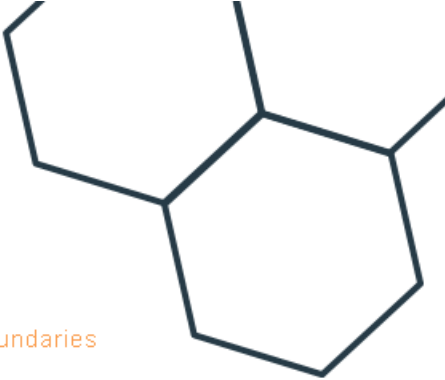
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Professional Boundaries

Characteristics of Boundaries:

- Organize Social Worlds
- Communicate the SC/CM's Responsibilities
- Facilitate Intention
- Unique to the Person/Culture
- Reflect Assumption & Intentions
- Protect Privacy




Boundaries are clearly established limits that allow for safe connections between Support Coordinators/Case Managers and those they serve. They include an understanding of the limits and responsibilities of the Support Coordinator/Case Manager's role as a service provider.

In general, boundaries:

- organize our social worlds and communicate our positions within them;
- communicate the Support Coordinator/Case Manager's responsibilities;
- facilitate intention to be close to or separate from others;
- are unique to each person and culture;
- reflect assumptions and intentions about particular relationships; and
- protect privacy.


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Why are Boundaries Important?

- Reduces Risk of Exploitation
- Reduces Anxiety as Rules & Roles Are Clear
- Increases Well-being of the Support Coordinator/Case Manager
- Provides a Role Model for Those Served

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Boundaries are important in any helping relationship.

They:

- reduce the risk of exploitation;
- reduce anxiety as rules and roles are clear;
- increase well-being of the Support Coordinator/Case Manager; and
- provide a role model for those served.




The link provided offers additional information by Mechele Shipman who provided the information in this module about Boundaries. The link is also listed in the material section of this module.

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Boundaries in the Helping Relationship

- Model Healthy Communication and the nature of professional relationships
- Help Avoid a "Rescuer" Role
- Aid in Maintaining a Healthy, Functioning Team with other providers
- Help the SC/CM Focus on Their Responsibilities to the person served and the provision of appropriate services
- Help Avoid Burnout
- Aid in Maintaining Health & Safety physical & emotional




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Boundaries also serve to:



- model healthy communication and professional relationships;
- help the Support Coordinator/Case Manager avoid taking on a rescuer role;
- help the Support Coordinator/Case Manager focus on their responsibilities to the person served and the provision of appropriate services;
- help avoid burnout;
- assist in understanding the role of other providers and team members to aid in maintaining a healthy, functioning team; and
- aid in maintaining the Support Coordinator/Case Manager physical and emotional health and safety.

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Creating & Maintaining Boundaries

- Establish clear agreements regarding your role as a Support Coordinator/Case Manager
- Address boundary issues quickly and clearly
- Make sure any self-disclosure is relevant to the client's goals
- Frequently clarify your role and boundaries to ensure understanding
- Use your supervisor or professional colleagues
- Promote positive, open communication and respectful sharing of information when working in teams

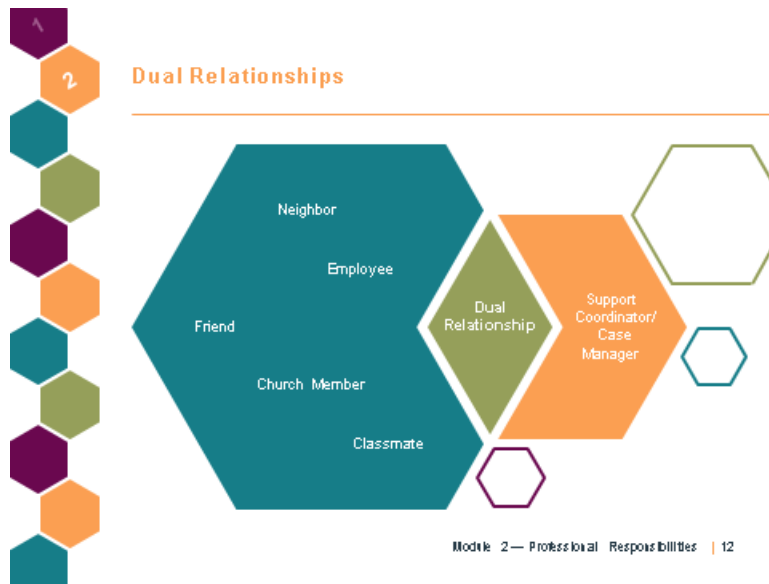


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In order to create and maintain boundaries it helps to do the following:

- As early as possible in the relationship, the Support Coordinator/Case Manager needs to establish clear agreements with those served regarding their role as a service provider, their availability, best ways to communicate with them, and what to do if they see each other in a public setting.
- When boundary issues appear, Support Coordinators/Case Managers need to address them quickly and clearly, being sensitive to the person's feelings.
- If the Support Coordinator/Case Manager discloses personal information, it should be relevant to the person's goals. Too much self-disclosure shifts the focus from the person served to the provider and can confuse their understanding of the relationship.
- Support Coordinators/Case Managers may need to frequently clarify their role and boundaries to ensure understanding.
- The Support Coordinator/ Case Manager can use a supervisor or professional colleagues as a sounding board if they have questions or concerns.
- When working with a team of providers, promote positive, open communication and respectful sharing of information. Build trust and recognize that no one service provider can nor should be the only help someone receives.

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Dual relationships occur whenever the Support Coordinator/Case Manager interacts with someone they serve in any capacity beyond the professional relationship, such as neighbors, employees, or church members.

Dual relationships are sometimes easier to avoid in larger, urban areas than in smaller, rural areas. However, even in larger areas, they cannot always be avoided.

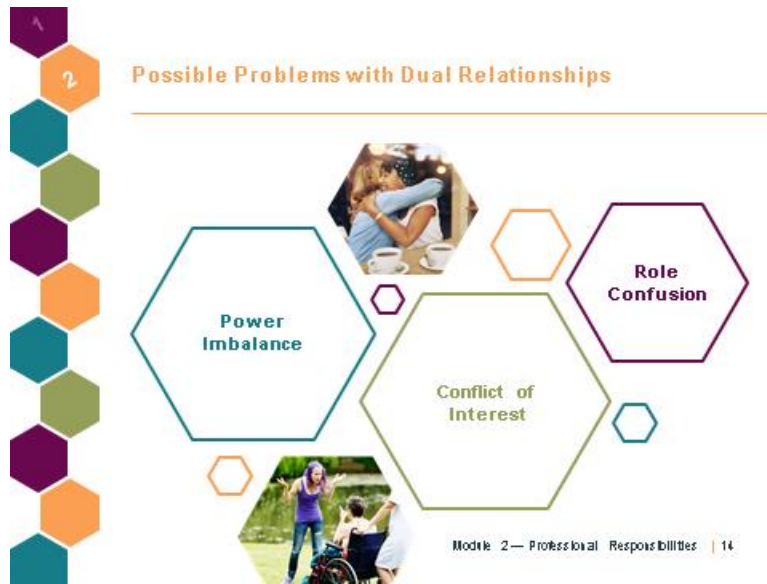
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Some examples of a dual relationship are:

- a Support Coordinator/Case Manager discovers that a member of their own Alcoholics Anonymous group is the sibling of someone they support;
- a person who works with a Support Coordinator/Case Manager joins a recreational softball league team that regularly plays against the team to which the Support Coordinator/Case Manager belongs; and
- a Support Coordinator/Case Manager volunteers for the food pantry at their church and a person who is served by that Coordinator/Manager arrives requesting food.

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What are the possible problems with dual relationships?

The first is role confusion. People the Support Coordinator/Case Manager serves could become confused by the existence of multiple roles. They may wonder, *“Are you supporting me as a professional, or are you attracted to me as a friend?”*

The second is power imbalance. There is a power imbalance between the Support Coordinator/Case Manager and the person with the disability. The Support Coordinator/Case Manager could unintentionally exploit or harm the person in some manner.

The third issue that may arise with a dual relationship is a conflict of interest. Additional relationship roles could interfere with the professional relationship by creating conflicts of interest for the Support Coordinator/Case Manager.

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Each organization has its own set of professional guidelines. However, there are some steadfast professional “do’s and don’ts” that apply to the relationship between the Support Coordinator/Case Manager and the people they serve.

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Professional Dos

- Be alert to the potential for confusion and issues related to the person's rights to confidentiality
- Discuss any dual relationships with a supervisor and colleagues
- Prioritize the professional relationship
- Avoid dual relationships when possible



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Support Coordinators/Case Managers need to:

- be alert to the potential for confusion and issues related to the person's rights to confidentiality when there are dual relationships;
- discuss any dual relationships with a supervisor and colleagues and consider transferring the person to another Support Coordinator/Case Manager, if needed;
- make the professional relationship with the person the priority; and
- avoid dual relationships when possible.

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Professional Don'ts

- Go on a date or have sex with a person they support
- Ask for help with personal problems
- Give personal information, such as home number or address, to the person they support
- Barter, loan or borrow money from anyone they support
- Give or accept gifts



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A Support Coordinator/Case Manager should not:

- go on a date or have sex with a person they support;
- ask a person they support for help with personal problems;
- give their home number or address to the person they support;
- barter, loan or borrow money from anyone they support; or
- give or accept gifts.

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The slide features a vertical column of ten colorful hexagons on the left side, with the number '2' in an orange hexagon. To the right, the text 'Thought Exercise' is displayed above a large hexagonal graphic. This graphic contains a photograph of a large tree trunk that has been cut and is lying on the ground in a yard. The photo is framed by several smaller, empty hexagons in various colors. At the bottom right of the slide, there is a small footer that reads 'Module 2 — Professional Responsibilities | 18'.

Several trees fell down in a Support Coordinator's/Case Manager's yard after a recent storm. Jameson, who uses Support Coordination/Case Management services and is supported by the home owner, offers to cut down and remove the trees for a reduced rate.

Here are some reflective questions the Support Coordinator/Case Manager may ask themselves:

- Is there a conflict of interest?
- What could happen if Jameson does a poor job or injures himself?
- Might his working for you now affect how you later make decisions about the services he receives?
- How might other people you support perceive his working for you?

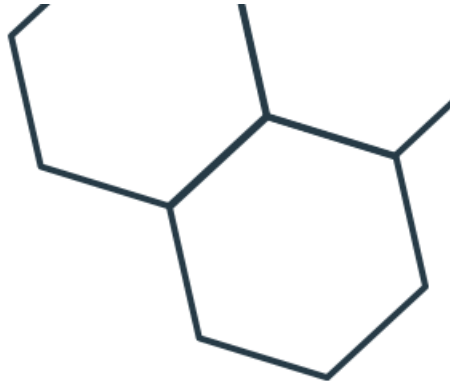


Self-Disclosure

Two Types:

- Self-Involving Statements
- Personal Self Disclosure

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Another aspect of boundaries that is often of special interest is Self-Disclosure. Self-disclosure is defined as the intentional sharing of information about oneself.

There are two types of self-disclosure.

- Self-involving relationships are those that express the Support Coordinator's/Case Manager's reaction to the person they serve.
- Personal self-disclosure are those that share the struggles or problems that the Support Coordinator/Case Manager has experienced that are similar to those of the person they support.

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Examples of Self-Involving Statements

“I marvel that you’ve done as well as you have.”


“I’m not sure that I could have kept it all together like that.”

“I am so impressed with the progress you’ve made this week!”

Examples of Self-Involving statements are:

- “I’m impressed with the progress you’ve made this week!”;
- “I marvel that you’ve done as well as you have.”; and
- “I’m not sure that I could have kept it all together like that.”

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2

Examples of Personal Self-Disclosure

“I understand your worry about the job interview tomorrow. When I interviewed for my job, I was a nervous wreck!”

“As you talk about the problems with your teenager, it reminds me of similar challenges I had when my daughter was that age.”



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Examples of Personal Self-Disclosure are:

“I understand your worry about the job interview tomorrow. When I interviewed for my job, I was a nervous wreck!”; and

“As you talk about the problems with your teenager, it reminds me of similar challenges I had when my daughter was that age.”

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What should the Support Coordinator/Case Manager do if a person asks personal questions?

The Support Coordinator/Case Manager may disclose some personal information as a way to “normalize” or “universalize” the context.

Sometimes it helps people feel better to know that others experience what they are experiencing (e.g., sharing that you too hate going to the dentist).

BUT

If the Support Coordinator/Case Manager cannot clearly see how self-disclosing would be helpful, then personal information should not be shared.

AND

If the Support Coordinator/Case Manager is not sure whether they should answer a question at all, it is best not to answer it right away. They can think it through and ask a supervisor.

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Questions to Ask

- Is this in the person's best interest?
- Whose needs are being served?
- How would I feel telling a colleague about this?
- How would this be viewed by the person's family or significant other?
- Does the person I am working with mean something 'special' to me?
- Am I taking advantage of the person?
- Does this action benefit me rather than the person I support?

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The following questions are ones the Support Coordinator/Case Manager can ask themselves to examine potential boundary issues, dual relationships issues and self-disclosure. These were also provided by Mechele Shipman and may be found at the link provided.

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Let's Practice



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Let's practice. The next 3 situations require a Support Coordinator/Case Manager to make a decision regarding boundaries.

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Borrowing Money

“
Can I please borrow \$2?
I have absolutely no food and no money left.
”

Sorry — it’s against agency policy for me to lend money.
I might be able to help you get connected with the food pantry and the meals program.
Also, let’s talk again about budgeting and how to make your money last all month.
”

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Someone the Support Coordinator/Case Manager serves says


“Can I please borrow two dollars? I have absolutely no food and no money left.”

The Support Coordinator/Case Manager knows this is likely true as he has difficulty budgeting. Most agencies have a policy against lending money to people using services.

A possible response could be:

“Sorry, it is against agency policy for me to lend money. But I might be able to help you get connected with the food pantry and the meals program. Also, let’s talk again about budgeting and how to make your money last all month.”

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Self-Disclosure

“
Are you also
in recovery?”

”
It sounds
like you
want to know
what recovery is
like for others.”



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A person early in recovery from alcoholism is having a hard time and says to the Support Coordinator/Case Manager in a very sincere tone, “Are you also in recovery?”

Different people have different opinions about whether and when Support Coordinators/Case Managers should disclose if they are in recovery. The Support Coordinator/Case Manager may want to first find out what it would mean to the person if they are or are not in recovery.

A possible response could be

“It sounds like you want to know what recovery is like for others.”

Please note that this type of response is very different than what is expected of peer specialists and some other positions.

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Personal Contact Information

You are the only one here who helps me when I feel this way. I would never use it a lot, but could I have your home phone number for times like these?

I am glad to hear that talking with me is helpful. The agency doesn't allow me to give out my personal phone number, but you can always call me on my work phone. But let's also talk about this... who else in your life would you like to be able to turn to when you feel this way?



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A mother of a young man with a developmental disability experiences periodic bouts of anxiety about his situation, calls the Support Coordinator/Case Manager and says, “You are the only one here who helps me when I feel this way. I would never use it a lot, but could I have your home phone number for times like these?”

Most agencies have a policy against giving out personal contact information.

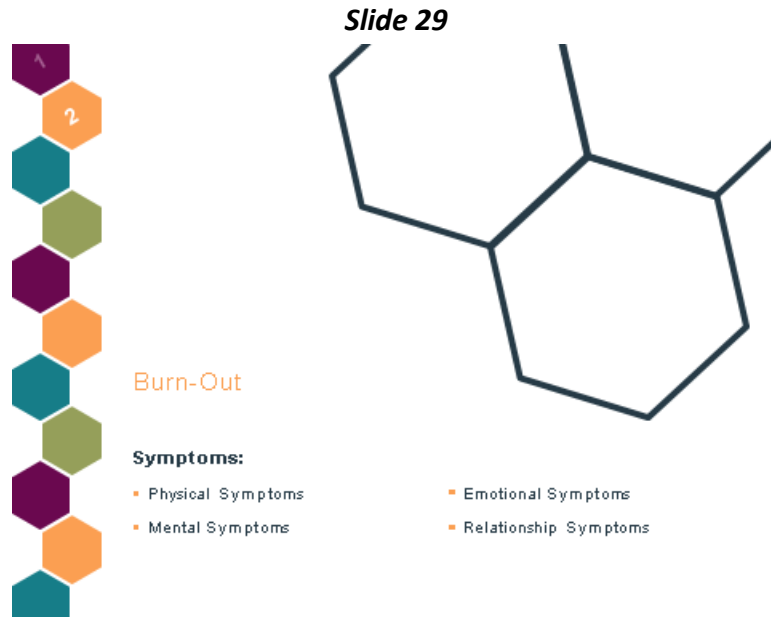
You could respond by saying,

“I am glad to hear that talking with me is helpful. The agency doesn’t allow me to give out my personal phone number, but you can always call me on my work phone. But let’s also talk about this...who else in your life would you like to be able to turn to when you feel this way?”

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So far we have focused on how to develop and maintain relationships with the people served. An important, and often ignored, aspect of providing effective Support Coordination/Case Management services is self-care. After all, if the Support Coordinator/Case Manager does not take care of themselves, how can they effectively support other people?

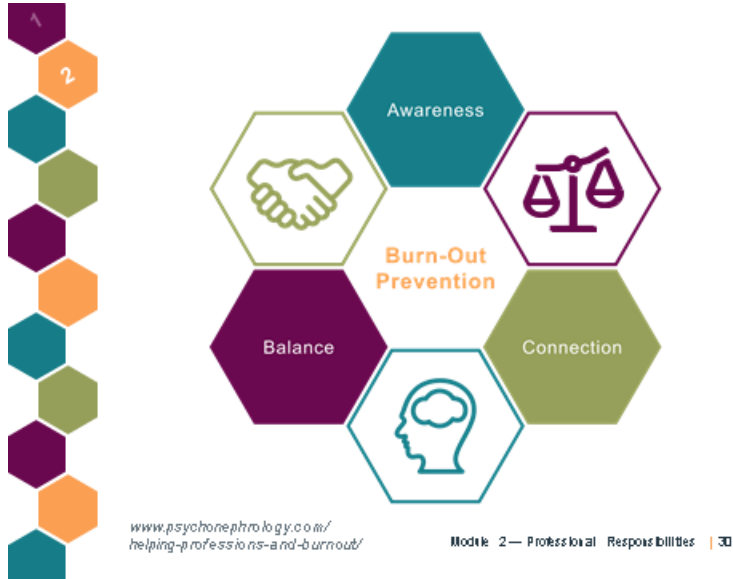


One of the risks that comes from working in the helping profession and as a Support Coordinator/Case Manager is burnout.

The symptoms of burnout will vary but generally a combination of the following will develop as a signal that something is out of balance.

- Physical symptoms may include chronic low energy or exhaustion, aches and pains, increased colds, flus and infections, and sleep problems.
- Mental symptoms may include boredom, forgetfulness, poor concentration, fault finding and irritability.
- People under too much pressure who do not have enough support may have more general feelings of discomfort. They may be disenchanted with life without being able to put a finger on precisely what is wrong. Often they have difficulty getting along with family, friends and co-workers. They may be disillusioned with their marriages and careers. They can find themselves filled with frustration at having to put increasing amounts of time and energy into maintaining the pace they have set for taking care of others while their own needs go unmet.

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Some of the things a Support Coordinator/Case Manager can do to prevent burn out are:

- acknowledge the burnout;
- talk to your supervisor;
- if available, contact your agency’s Employee Assistance Program, (EAP);
- get adequate sleep;
- eat a healthy diet;
- exercise;
- be aware of feelings and find a way to express them with others;
- being intentional about understanding one’s own needs and then acting accordingly;
- giving attention to the physical, emotional, psychological, spiritual, and social aspects of oneself;
- delegate responsibilities when possible;
- stay connected in meaningful ways with others.

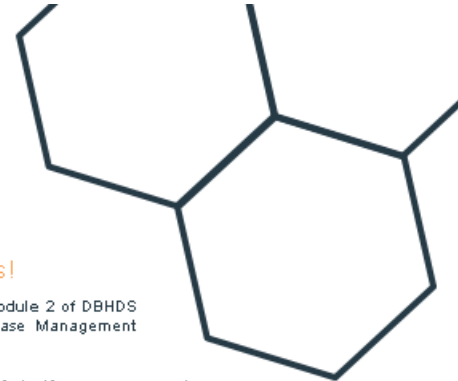
The link provided gives additional information about burnout. The link is also listed in the material section of this module.

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Congratulations!
You have completed Module 2 of DBHDS Support Coordination/Case Management online training.

Click here to complete the assessment.



Congratulations!

You have completed Module 2 of the DBHDS Support Coordination/Case Management online training. Please note that all of the web links provided in this Module are contained in the accompanying training materials. Please complete the assessment for Module 2 before proceeding to Module 3.

Thank you for your participation!