

ACWS

Alberta Council of
Women's Shelters



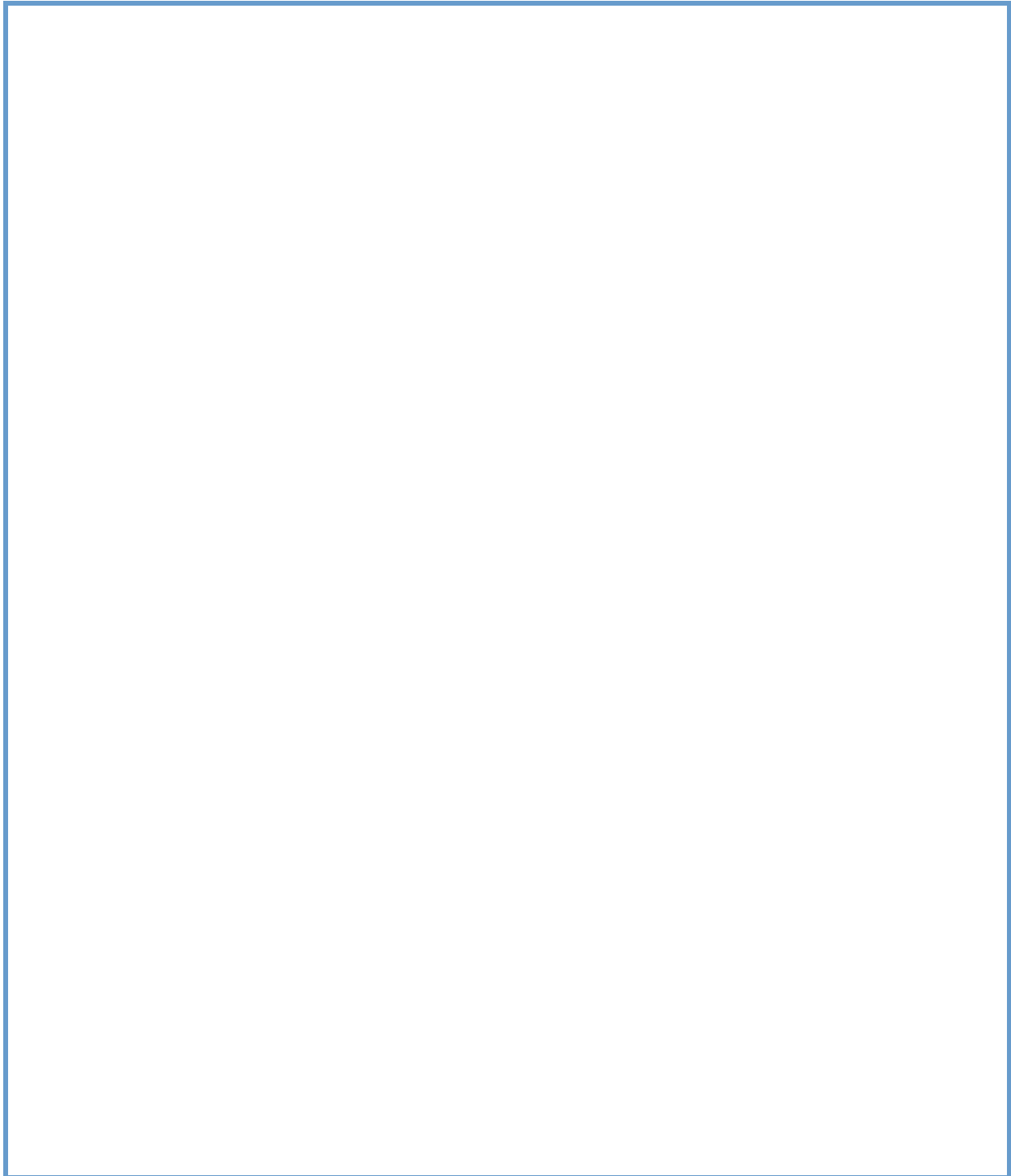
**Level 1:
Foundations**

**Case Management
Foundations Workbook
Module 2**

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Introduction

Welcome to Case Management Foundations Module 2.

Use this Workbook to capture your thoughts, reflections, ideas, or insights as you go through the eLearning module.

Acknowledgements

The Alberta Council of Women's Shelters (ACWS) wishes to acknowledge the traditional territories on which we live, work and play. We recognize that all Albertans are Treaty people and have a responsibility to understand our history so that we can honour the past, be aware of the present, and create a just and caring future.

We honour the courage and strength of Indigenous women. We honour them as life givers and caregivers as we honour and learn from their continuing achievements, their consistent strength, and their remarkable endurance.

We acknowledge that this course, Case Management Foundations, was created on Treaty 6, 7, and 8 lands, as well as the six Métis regions of Alberta. We dedicate this education to all the women and families who inspire us with their courage, strength, resilience, and kindness. We thank the many individuals whose work, input, and expertise have contributed to its development.

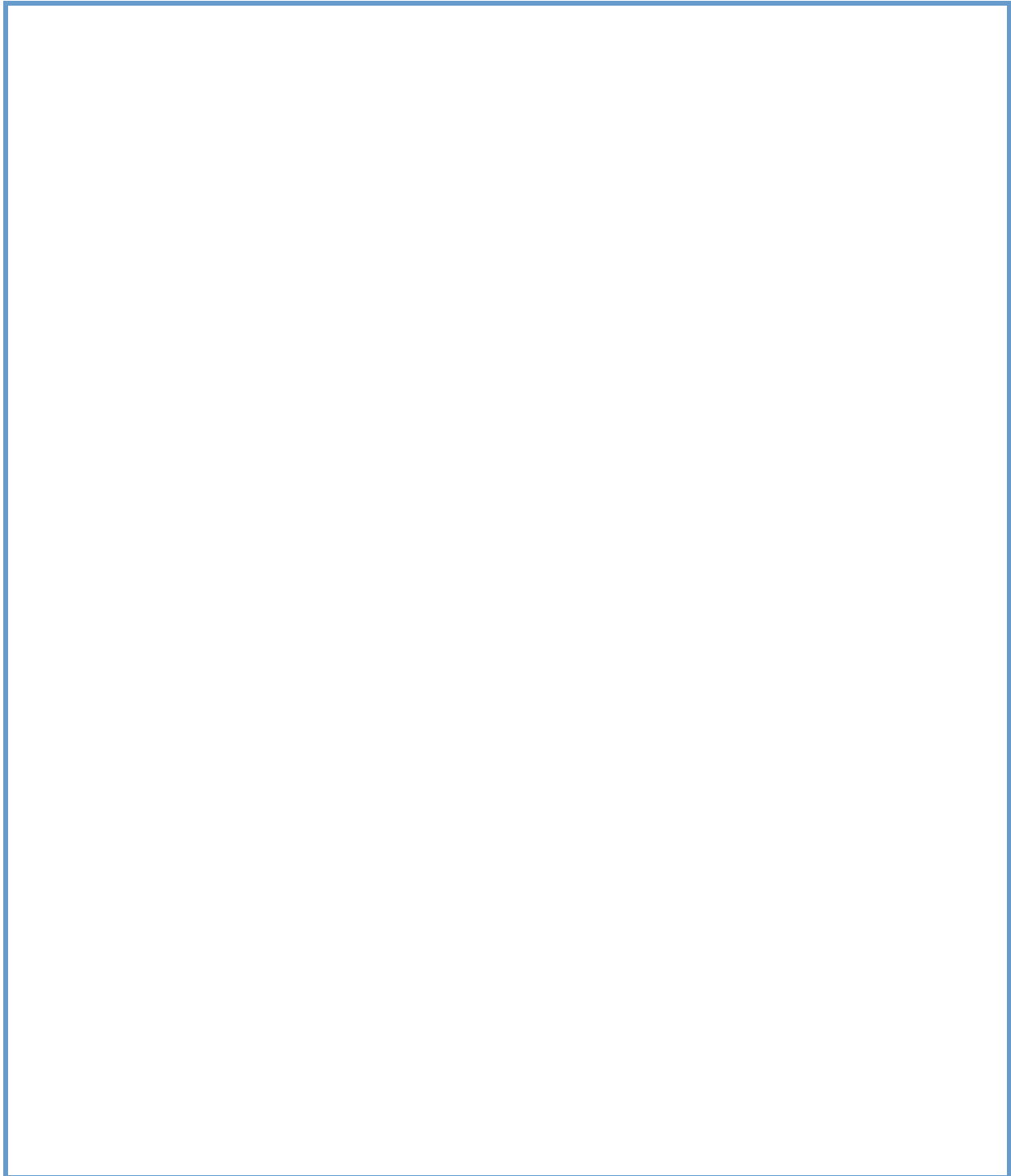
ACWS benefits from the wisdom, expertise, and innovation of our members across Alberta, who provide front-line support to individuals and families experiencing domestic abuse. This project could not be completed without their generous support and knowledge-sharing. Case Management is an evolving practice and the ongoing input and feedback from ACWS members, both individually and collectively, has made and will continue to make this course relevant for, reflective of, and responsive to the Alberta context of domestic abuse shelter practice. Special thanks to Stepping Stones Crisis Society for providing specific exercise content for this course.

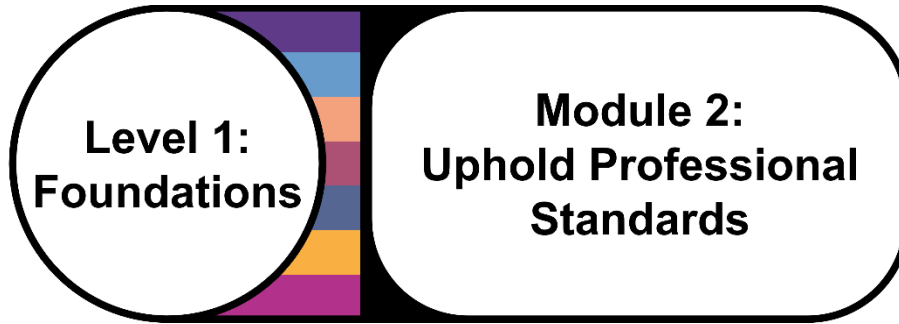
We would also like to acknowledge that this educational offering is made possible with funding and partnership from the Government of Canada under the Community Services Recovery Fund, and from the Ministry of Children and Family Services.



Questions, ideas or suggestions? Contact learning@acws.ca

Notes





Module 2: Uphold Professional Standards

Lesson 1: Frame your learning



Stop & think

Why do we have professional standards?

Why are there so many different codes of conduct, guidelines, and principles?

Professional standards play a vital role to promote excellence, accountability, and ethical practice within a profession.

They exist to:

- Align with legal requirements and regulations governing a particular profession.
- Promote ethical behaviours and integrity.
- Help maintain the quality and consistency of services provided.
- Safeguard service users' rights and dignity.
- Foster public trust and confidence.

Lesson 2: Be the professional

As an ethical Case Manager, you must regularly **reflect on your professional boundaries** and **seek support or supervision when faced with challenging situations**. Maintaining professional boundaries not only protects the well-being of survivors and preserves the integrity and credibility of your work; it also supports your longevity in the gender-based violence sector, your personal relationships, and overall wellness.

Set and maintain boundaries

We are not comfortable setting boundaries because we care more about what people will think; we do not want to disappoint anyone; we want everyone to like us. **Boundaries are not easy.**

— Brené Brown

Not all Case Managers are social workers. See the list of roles and responsibilities expected of social workers (The Social Work Graduate, 2021, p.1) and reflect on how these connect with your role and job description:

- Help and support clients to the best of their ability and ensure that what is done does not harm them.
- Ensure that their actions are based around the needs of the clients wherever possible.
- Act in a trustworthy and responsible manner in all their dealings with and for clients.
- Be truthful and honest in their interactions with clients.
- Respect clients' rights as individuals.
- Ensure that all current and potential clients have an equal opportunity to access and benefit from their service.
- Work for the good of their team and the organization they work for.



Write it out

How do these responsibilities align with your role and job description?
What specific actions do you take to ensure you support survivors to the best of your ability and avoid causing harm?



If you're not sure of your professional boundaries in a situation, **ask for support** from your supervisor.

Safety on the job

To sustain in your role as a Case Manager and to maintain your wellness, it's essential to:

- Develop an awareness of countertransference, burnout, compassion fatigue, and vicarious trauma.
- Set and maintain boundaries to mitigate the potential impacts of working with survivors of gender-based violence.
- Cultivate self-awareness and reflective practice.

Countertransference refers to the emotional reactions you experience toward a survivor, influenced by your own personal background, feelings, and experiences. This may occur when you, as a Case Manager, have unresolved issues that are highlighted within your interactions with survivors, causing you to project your conflicts onto them.

Burnout refers to the physical, mental, and emotional exhaustion caused by chronic work-related stress.

Compassion fatigue, also referred to as “secondary traumatic stress”, is the “cost of caring” for others in emotional pain (Figley, 1982), leading to biological, physiological, and emotional exhaustion from prolonged exposure to others' trauma (Figley, 1995).

Vicarious trauma refers to the profound changes in worldview and sense of self, resulting from being deeply affected by the trauma survivors share with you (McCann and Pearlman, 1990).

If left unaddressed, these may threaten professionalism and impact quality of life. In turn, this can lead to high staff turnover, compromised support for survivors, or even re-traumatization.



If you notice that you are experiencing signs of vicarious trauma, or if you're worried that you are at risk, **ask your supervisor** about supports available to you through your shelter. There may be employee family assistance programs and other employee wellness initiatives that are available to you through your benefits.



Talk to your team

Maintaining your professional safety involves setting boundaries between personal and professional activities. Have a discussion about what collective care looks, sounds, and feels like for you as a team.

What professional boundaries need to be in place for you to support the emotional and physical safety of yourself, your colleagues, and the survivors you serve?

Lesson 3: Keep accurate records

Information from anonymized case notes is used for research. And research results further enhance shelter services.

When you create and appropriately manage reliable and thorough records of survivor data (Ruebsaat, 2006):

- **You** demonstrate your competence and dedication to the work.
- **Your colleagues** can understand a survivor's history and needs, ensuring continuity and quality of care.
- **The shelter** can evaluate program services and secure continued funding to address any identified gaps in services.
- **Other service partners**, such as legal and financial support, can offer responsive, personalized assistance to survivors.
- **The sector** can use the statistical data to engage in public education and advocacy for both survivors and shelters.
- **Survivors** receive the comprehensive support they need without having to continuously repeat intimate details which create vulnerability.

However, EVERYONE is negatively impacted when documentation isn't done properly.

- **You** may face disciplinary action and lose support from colleagues and supervisors.
- **Your colleagues** may re-traumatize survivors by asking survivors for details already disclosed. They may also struggle to provide consistent care.
- **The shelter** may be unable to fulfill its reporting requirements and may lose critical funding to serve survivors effectively.
- **Other service partners** may be unable to offer consistent and informed care, leading to gaps in support for survivors.
- **The sector** may be less effective in its advocacy and public education efforts.
- **Survivors** may lose trust in you and the shelter. They are less likely to access the comprehensive support and resources they need to ensure their safety and begin their healing journey.
- **Risks** may be missed and safety of survivors compromised.

Management of GBV survivor data

	Dos	Don'ts
Data collection	<ul style="list-style-type: none"> • Always collect data only with the survivor's informed consent, and in a way that limits identification. • Do collect data only when reported directly by the survivor or their caregiver in the presence of the survivor whenever possible • Do collect data that relates to the best interests of children. 	<ul style="list-style-type: none"> • Do not collect data for survivors for whom you will not be delivering any services. • Remember, any type of survivor data should be collected in the framework of service provision. While some forms of data collection may be standardized, take the time to listen and to understand the individual stories and unique dynamics shared by survivors.
Data storage	<ul style="list-style-type: none"> • Data must be stored in ways that ensure the safety and confidentiality of survivors, both in paper and electronic form. • To the extent possible, do file GBV documentation in a secure digital system and/or in a secure physical storage, if digital systems are not available. 	<ul style="list-style-type: none"> • Do not store survivor data in public places where others can have access to it, or in homes. If you work from home, ensure that you implement security measures such as password protection.

Data sharing

- Only share survivor data with the survivor's informed consent, and for the purpose of referrals and service provision among service providers. Understand that if there is imminent risk to the survivor or others identified you are required to share information.
 - Do adopt internal protocols to determine how individual and identifiable data will be shared within your organization, and with other service providers for service provision.
 - The level of shared data is determined by the need-to-know and do-no-harm principles.
 - Make sure that service providers only receive information they need to provide services to the survivor.
 - Do use organizationally approved data tracking methods.
 - Be sure to consult with your Shelter Director about Information Sharing Agreements that may be in place (e.g. such as with ACWS)
- Do not share identifiable survivor data outside your organization.
 - Do not use methods of data tracking that have not been approved by your organization (e.g. third party apps)
 - Do not store survivor data on your personal devices such as your phone or personal computer.
 - Do not provide access to your organizations' files (physical or electronic) to unauthorized users.

Confidentiality

The Social Work Code of Ethics (2005) outlines a number of principles regarding confidentiality.

- Social workers respect the importance of the trust and confidence placed in the professional relationship by clients and members of the public.
- Social workers respect the client's right to confidentiality of information shared in a professional context.
- Social workers only disclose confidential information with the informed consent of the client or permission of the client's legal representative.
- Social workers may break confidentiality and communicate client information without permission when required or permitted by relevant laws, court order or this Code.
- Social workers demonstrate transparency with respect to limits to confidentiality that apply to their professional practice by clearly communicating these limitations to clients early in their relationship.

Take effective case notes



Talk to your team

Familiarize yourself with your shelter's documentation policies and practices. Ask your colleagues about their approach to record keeping. Review the shelter case note samples or templates, if available, for insights into the format and content expected in your documentation.

Documentation guidelines

Effective case notes are central to providing consistent, high-quality support to survivors. In general, you need to keep enough information to verify dates and activities of contacts, as well as any referrals or advocacy, in your case notes (Ruebsaat, 2006).

- Be timely
- Obtain informed consent
- Use objective language
- Include relevant details
- Maintain confidentiality
- Review & revise

Documentation may not be everyone's favourite part of the job – but it **IS** our job. We have a **legal obligation**.

Lesson 4: Put it all together

The ability to **critically reflect upon personal practice** is central to maintaining an ethical position when working with survivors of gender-based violence. Utilize opportunities for supervision and draw upon the experience of your colleagues within the sector. **Never stop learning.**



Write it out

What are your biggest takeaways from this module?

What is ONE thing you'll implement in your practice right away?

Notes



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Module 2

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