Trainer's Notes

W-2 Case Management and You

Purpose
The purpose of this course is to provide FEPs/Case Managers with strategies for effective time management, healthy boundaries, and practicing self-care.

Objectives:
Upon completion of this course you will be able to:

- Describe how to prioritize the ongoing tasks required in W-2 case management;
- Apply strategies to maximize your time and work more effectively with customers;
- Establish professional boundaries when working with W-2 participants;
- Maintain appropriate boundaries within the W-2 worker and W-2 participant relationship;
- Identify your support network; and
- Describe the links between self-care and effective case management.

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Materials Needed

- W-2 CM & You Training Kit (including supply list)
    - Sticky dots
    - Colored popsicle sticks (enough for the entire class, equally divided among four different colors)
    - Time Management Activity material sets (one for each table group). Each set contains:
        - Half gallon plastic jar with lid
        - 3 - Plastic baseballs or whiffle balls
        - 20 - Plastic golf balls or ping pong balls
        - Pebbles
    - Why Cube materials
        - White foam cubes from 4imprint, unassembled (one per learner)
        - Sharpie markers, or other fine point permanent markers (one per learner)
    - Laminated weekly calendar for Prioritization in Practice – Part Two
    - Small dry erase markers with eraser (one for each group)
    - Packs of regular and small post-it notes for each group

- Sign in sheet
- Card stock for name tents
- Evaluations (located on the ECM curriculum page)
- Computer, LCD projector, and portable speakers
- Course PPT
- Internet access to play embedded videos (hotspot or wifi)
- YouTube videos – all are embedded in the PPT; links are listed below if needed
    - An Important Lesson in Time Management (https://www.youtube.com/watch?v=F5JI_6nsgaM), from beginning to 3:13
    - Prioritizing Tasks (Eisenhower Matrix) (https://youtu.be/czh4rmk75jc)
    - The Monkey Business Illusion (https://youtu.be/IGQmdoK_ZfY)
- CPS Unit and CPS File for "What Do You Think?" activity
- Flip chart paper and markers – Prepare in advance:
    - "Toolbox" - hung at back of classroom prior to class start
    - Gallery Walk Self-Assessment
    - Which Order Activity (example in TN)
    - Eisenhower Matrix (example in TN)
    - Monday calendar for Prioritization in Practice – Part One (example in TN)
    - Prioritizing Self-Care
- Painter's Tape
- Printed copies of each of the 4 types of trivia quizzes
- Buzzer, chime, or bell for diversity activity
- Printed copies of the PROQOL Self-Assessment for each learner (located on the ECM curriculum page)
- Blank sheets of paper for brainstorming during the Eisenhower Matrix activity
- Tabletop supplies

Suggested Pace

This is a six-hour course. The following agenda is the suggested pace.

9:00 – 9:15: Introduction
9:15 – 9:40: Prioritization: Getting Started
9:40 – 10:05: Eisenhower Matrix Activity
10:05 – 10:20: Break
10:20 – 10:45: Prioritization in Practice Activity Part 1
10:45 – 12:00: Prioritization in Practice Part 2
12:00 – 1:00: Lunch
1:00 – 1:30: Professional Boundaries: Perception
1:30 – 1:50: Zone of Helpfulness
1:50 – 2:10: Boundary Violations
2:10 – 2:25: Tips for Setting Professional Boundaries
2:25 – 2:40: Break
2:40 – 3:00: Self-Care
3:00 – 3:20: Self-Care Strategies
3:20 – 3:55: Prioritizing Self-Care
3:55 – 4:00: Closing

☼ PPT 1

Introduction

Welcome to W-2 Case Management and You: Strategies for Time Management, Professional Boundaries and Self-Care. Today we will focus on strategies to help you enhance your W-2 case management skills. Throughout the day, you will have opportunities to network with your peers, share your own best practices, and put these strategies into practice.

Let's start by getting to know a little bit about ourselves and each other.

Gallery Walk Self-Assessment

Purpose: Learners employ a quick needs assessment and acknowledge the strengths, skills, interest, and expertise of themselves and others.

Materials: One marker for each learner. Prepared flip chart paper hung up around the room, one with each of the following headings:

- Is excited to attend this course and learn more about strategies for time management, setting professional boundaries, and self-care
- Color codes appointments and tasks
- Has faced a situation in which a professional boundary was tested
- Regularly practices some type of self-care
- Prefers to use a paper calendar or written to-do-list
- Has a hard time saying "no" when asked for a favor
- Maintains a healthy work life balance
- Uses a cellphone as an alarm clock

Estimated Length: 5 minutes

Directions to Trainer: Have prepared flip chart paper hung prior to class. Learners walk around the room, adding their name to any flip chart paper that applies to them. We anticipate learners will notice the distribution of the names on the flip chart paper, which will vary by class. Are they fairly evenly distributed? Are there many names in one category and few or none in another? This will help to determine which topics may need extra focus. If appropriate, point out to the class that this can help them see which of their peers may be a good resource. For example, if I have a hard time saying 'no', I may ask learners who did not list their names on this paper for some tips on how to say 'no'.

Trainer Instructions to Learners: Take a marker and walk around the room, reading the phrases on each piece of flip chart paper. If the statement applies to you, write your name on the paper. You can start at any sheet of paper, but make sure you read them all. When you are finished, return to your seat.

Take a moment to look at the different statements around the room.

Ask What observations or guesses can you make about people in this class based on the statements?

Establishing a Foundation for Success as a Case Manager

PPT 2

PG 4

Employing effective strategies for managing your time, setting professional boundaries, and practicing self-care are fundamental to succeeding in your role in helping participants.

PPT 3

Although each of these areas is important on its own, they overlap, as practicing good time management allows you to practice self-care, which includes setting professional boundaries to maintain a healthy work life balance. Remember, you are at the center of these strategies, and practicing each of them leads to you being a better case manager.

Throughout the training today, we'd love to hear your tips, tricks, and tools on the topics we are discussing. At any point, if you think of a best practice, please write it down on a sticky note and place it on the Toolbox flip chart paper hung up at the back of the room.

Time Management

☼ PPT 4

PG 5

We're going to start by talking about time management. Time management refers to the practice of reviewing all your tasks or activities, estimating how long you will spend on each one, and prioritizing the order in which you complete them. Let's take a look at how each of us prioritizes these common morning tasks.

In Which Order Activity

☼ PPT 5

Purpose: Learners see how tasks are prioritized differently based on personal preference.

Materials: Sticky dots (each learner gets three dots), prepared flip chart paper with the following table:

Example of prepared flip chart paper:

	Eat Breakfast	Make Bed	Brush Teeth
1st			
2nd			
3rd			
NA			

Estimated Length: 10 minutes

Directions to Trainer: Ask learners to place their sticky dots on the prepared flip chart paper to indicate the order in which they complete the following tasks: eat breakfast, make bed, brush teeth.

Trainer Instructions to Learners: Place your sticky dots on the chart in the order you complete these morning tasks: brush teeth, make bed, and eat breakfast.

Debrief Question: What observations can you make from looking at the chart?
Answer: People complete these tasks in different orders; some people choose not to complete certain tasks or may do the same task twice (such as brush their teeth before and after breakfast).

Even though we may find all these morning tasks important, we ranked them differently based on individual preference, giving one task priority over the others. We do the same with work-related tasks; however, W-2 has policies to consider when deciding what tasks are a priority.

Today we start by discussing some specific prioritization strategies that can help you be more effective as a Case Manager. Later we dive into setting professional boundaries and taking care of yourself.

Prioritization – Getting Started

PPT 6

Prioritization is a process of assessing tasks and ranking them in order of importance or urgency. It is an essential skill that can help you:

- Reduce *stress*;
- Save *time*;
- Manage multiple *deadlines*;

PPT 7

- Bring order to your day; and
- Move toward an *effective conclusion* to your daily tasks.

Ask What does your workday typically look like in terms of what needs to be accomplished or what types of appointments you have?

Note to Trainer: If the class consists of learners still in new worker training who do not yet have appointments, rephrase the question to ask about the typical workday of a Case Manager in their agency, or what they expect their typical workday to look like when they have a caseload.

Many of you may complete similar tasks, but your co-workers might prioritize their day differently than you do.

Sometimes we set our priorities based on personal preference, such as what we do after waking up; but at work, we need additional strategies to be more efficient.

Often, everything that you have to do seems like a top priority, which makes it tough to figure out where to begin. It can be appealing to complete a task that you like or can get done quickly, even though it is not as important as other tasks.

Let's review some strategies that can help you get started with prioritization.

Know Where Your Time Goes

PPT 8

Have you ever had a day go by so quickly that you didn't know where it went? Read the question at the bottom of page 5 in your participant guide and write down your answers.

Question: What are some distractions that draw your attention away and cause you to stop what you're doing?

Ask learners to share some examples.
Possible responses:
- *Emails*
- *Phone calls*
- *Being unorganized, including shuffling through papers or looking for something*
- *Socializing/chit-chat*
- *Social media*
- *Spending too much time on a task (unneeded perfectionism)*

PPT 9

According to a study by Dr. Gloria Marks, people interrupt themselves about 44% of the time.

That means you are causing almost half of your distractions throughout the day.

Ask Which of these distractions from your list do you have control over?

Possible responses:
- *Emails – turn off the alert sound, allocate specific time to check your inbox*
- *Surfing the internet or spending time on social media*
- *Taking unneeded breaks*
- *Being unorganized*

Research by CubeSmart found that 73% of interruptions generally are handled immediately, whether or not they need to be. This means that we need to be better at identifying whether a distraction is important enough to become a priority. For instance, you may not answer the phone if you are typing PIN Comments because you may lose your train of thought or have to switch screens based on the caller's needs. But, if you are scanning through emails, you may decide that answering the call is a priority.

Time Management Activity

☼ PPT 10

PG 6

Purpose: Learners visualize and put into practice how prioritizing their tasks can make a difference in their day

Materials: YouTube video (https://www.youtube.com/watch?v=F5JI_6nsgaM), ½ gallon plastic jar with lid, plastic baseballs/whiffle balls, plastic golf balls/ping pong balls, and pebbles

Estimated Length: 15 minutes

Directions to Trainer Part 1: Divide the class into their table groups. Each group is given one set of materials (1/2 gallon plastic jar with lid, 3 plastic baseballs, 20 plastic golf or ping pong balls, and pebbles). Tell the groups that all materials must fit into the jar with the lid on. Give the groups about 5 minutes to work. After five minutes, show the YouTube video.

Trainer Instructions to Learners: In your table groups, work together to put all of the materials into the jar, and then make sure the lid fits on the jar. You cannot alter the materials to fit in the jar. You have five minutes.

Click the PPT to start the five-minute timer and play music.
A chime will sound when the five minutes are up.

☼ PPT 11

Now, let's watch a short video on time management.
Click to start the video.

Work with your group to answer the questions on page 6. The person in your group with the most siblings will report out to the large group.

☼ PPT 12

I'd like each group to share one item you discussed when answering these questions.

Questions:
1. What stuck out to you in that video?
Answers will vary

2. Thinking about case management specifically, what do the baseballs represent? Golf balls? Pebbles?
Baseballs – appointments with participants, workshops, etc.
Golf Balls – PIN comments, outreach, scheduling, scanning, worker tasks, etc.
Pebbles – emails, voicemails, reports, etc.

3. How can this translate to your daily work?
Answer: Focus on the "big stuff" first, and then fill in the rest as able

Make a List

☼ PPT 13

Time management is one way to help you prioritize your day as a Case Manager, another helpful aspect of prioritization is making a list.

Ask How many of you use a To-Do List? How often do you update your To-Do List?

Keeping a daily To-Do List helps you visualize everything that needs to be completed, and then prioritize those tasks.

It is important to assess the value of each task when prioritizing them. For instance, not meeting W-2 program timelines has bigger consequences than not doing some other tasks on your list. Use a numbering, or other type of, system to assign priority.

A To-Do List needs to be flexible to accommodate unexpected tasks such as a participant in a situation requiring immediate attention. You need to balance providing customer service with your other priorities. This means handling important situations right away, but not dropping everything to meet with a participant who is just handing in activity sheets. Remember, you are the one to determine your priorities and what constitutes an emergency.

☼ PPT 14

One case management tool you can use to manage participant related tasks is the **Worker Task List** in WWP. The list is made up of system generated tasks and manual worker tasks. System generated tasks are automatically generated based on actions you take within the participant's record, whereas manual tasks are created by you. Manual tasks may include tasks such as contacting a worksite supervisor to check-in on a participant's work experience or to schedule an EP review with a participant.

PPT 15

For additional information on the **Worker Task List**, check out the W-2 Alerts and Worker Task List Reference Guide in Learning Center.

Keep in mind, most days you probably won't get to everything on your list, especially if unexpected tasks are added that take priority. After identifying the most important tasks to complete that day and estimating how much time they will take, move the rest from this list to another day.

Brainstorm Blast & Eisenhower Matrix Activity

PPT 16

PG 7

Purpose: Learners practice prioritizing tasks using the Eisenhower Matrix

Materials: YouTube video (https://youtu.be/czh4rmk75jc), paper for brainstorming, sticky notes, one prepared flip chart paper with the Eisenhower Matrix per group

Example of prepared flip chart paper:

	Important	Not Important
Urgent		
Not Urgent		

Estimated Length: 20 minutes

Directions to Trainer: Have blank sheets of paper on each table**.** Instruct learners to independently brainstorm different types of tasks they typically complete in a workday, week, or month. Encourage learners to write down on a blank sheet of paper all of the things they do, including unexpected tasks and non-work-related tasks or distractions that may arise. (2-3 minutes)

Divide learners into groups of 2-3 and ask them to share their lists with each other. Provide learners with sticky notes, and ask them to write all of the items on their list on sticky notes (one item per note, no duplicate tasks). (2-3 minutes)

Show learners the YouTube video (How to Prioritize…), which explains the Eisenhower Matrix. (3 minutes)

Following the video, instruct learners to work with their group to categorize their sticky notes on prepared flip chart paper, using the Eisenhower Matrix. (5 minutes)

Trainer Instructions to Learners: Have you ever taken the time to really think about everything you do as a case manager? Use the blank sheet of paper at your table to independently brainstorm all of the tasks you do in a typical workday, week, or month. Include scheduled work tasks, unexpected tasks, and potential distractions.

Share your list with the people in your group. Write tasks on sticky notes (one task per note).

PPT 17

Now we are going to watch a short video describing a strategy called the Eisenhower Matrix. While you watch the video, think about how you would categorize the tasks you came up with in your groups.

Click to start the video.

PPT 18

Now that you've seen the video with tips on how to prioritize, categorize your tasks on the prepared flip chart paper. When you finish categorizing your tasks, write down your thoughts and reactions regarding the video and activity on the top of page 7 in your participant guide.

Debrief Questions: (5 minutes)

1. How did it feel to categorize the tasks using the Eisenhower Matrix?
   Responses will vary

2. What is the value in using a tool like this to prioritize tasks? How could you use this tool in your daily work life?
   Possible Responses: This could help schedule and plan when to complete daily and weekly tasks. This could be used during staff meetings or at meetings between workers and supervisors to make sure everyone is on the same page regarding priorities.

Effective Scheduling

☼ PPT 19

Organization requires more than just prioritizing your tasks; you also need to find an effective way to schedule them. This helps you manage your time more efficiently. You can get more done and are less likely to *forget* tasks or become sidetracked.

It is important to allow *enough* time in your schedule to complete all work related to that task or appointment. For instance, an appointment with a participant includes both the time he or she is in your office, and the time you spend preparing for the appointment, entering comments, reviewing WWP entries, etc.

Also, *keeping* some time open in your schedule each day allows you to plan for the unexpected. This could be accomplished by keeping your first or last hour of the day open so you always have room to schedule an important appointment, respond to emails or voicemails, or take care of any tasks that took longer than you planned.

Most email programs, such as Microsoft Outlook, have calendars you can use for scheduling, as well as a place to create a task list or To-Do List. Additional features can be used to set reminders or color code activities. The tools section of the participant guide includes some helpful tutorial websites.

☼ PPT 20

Find a system that works well for you when it comes to scheduling your tasks and appointments. Per policy, you must use Client Scheduling to schedule applicant and participant appointments. For more information on that, please see the Client Scheduling course in the Learning Center. However, some workers use additional tools to help with organization.

One Case Manager shared that she uses Microsoft Outlook to track all her appointments. She includes the participant's name, type of appointment, and phone number in the subject part of the appointment entry, but adds any special tasks to be completed in the comments section of the appointment entry. To quickly see what is happening in her day, this Case Manager takes advantage of the color-coding system by assigning a different color based on a participant's placement, such as green for CSJ. She changes the color of an appointment if the participant does not show or call to indicate she needs to follow up. This system allows her to mentally prepare for the day ahead and remind her what still needs to be completed.

Ask What strategies did this Case Manager use to organize her schedule? Unmute or type your responses in the chat.

Possible Responses: Color-coding, Adding specific information to the subject and details fields, Updating the entries

Ask What other tips do you have for Case Managers to help organize or prioritize their schedules?

Possible Responses: Be careful about putting confidential information in your calendars, especially if you are sharing your calendar with co-workers.

Prioritization in Practice Activity - Part One

PPT 21

PG 8-9

Purpose: Learners use prioritization tips while scheduling case management tasks.

Materials: Prepared flip chart paper with Monday calendar, with one column for each pair or group, markers, calendar, appointment information

Estimated Length: 20 minutes

Directions to Trainer: This activity is divided into two parts. Although a calendar is used as a way to track this activity, the purpose is the thought process behind the decisions the groups make when creating the schedule.

Part One of the activity focuses on practicing effective scheduling by assigning enough time for each appointment. Groups add appointments to their calendar for Monday, deciding for themselves how long the appointment will take. Emphasize that these are Monday's appointments, and cannot be added to any other day on the calendar.

After groups have determined their Monday schedules, debrief each appointment type, asking groups to share what time the appointment is scheduled and how much time they allotted. As groups report out, record each groups appointment in their column on the prepared flip chart paper. Use a different color marker for each appointment type.

Example of prepared flip chart paper:

	Group 1	Group 2	Group 3	Group 4
8am				
9am				
10an				
11am				
12pm				
1pm				
2pm				
3pm				
4pm				

Trainer Instructions to Learners: Now you have the opportunity to put the prioritization tips we just covered into practice. You will work with your group to prioritize and schedule daily case management tasks. Today is Monday, and you have four different appointments to fit into your schedule. Read through each appointment description and schedule them on the calendar in your participant guide. It is up to you to decide how much time is needed for each appointment. Be prepared to share your schedule and explain the rationale for your decisions.

Suggested Modifications: Provide laminated calendars and dry erase markers for learners to use instead of using the calendar in the PG. If a large whiteboard is available, trainer can create a master calendar instead of the prepared flip chart paper.

Note to Trainer: We want to stay away from stating things such as, "You should always schedule one hour for eligibility appointments." When it comes to time allotted for each appointment, it may help to speak in terms of what is optimal versus what is possible. For instance, it is possible to complete an eligibility appointment in 30 minutes, but is it the optimal amount of time?

Debrief Question:

- What other tasks regarding these appointments do you need to take into consideration (in addition to just meeting with the participant)?

  *Possible Responses: Comments, scanning, following up with third parties such as IM worker, worksite supervisor, doctor, etc***.**

Prioritization in Practice Activity – Part Two

☼ PPT 22

PG 9-11

Purpose: Learners use prioritization tips to deal with unexpected schedule changes.

Materials: Laminated weekly calendar for each pair or group, markers, calendar, appointment information

Estimated Length: 20 minutes

Directions to Trainer: Part Two focuses on effective scheduling while assigning priority to tasks. Groups are faced with unexpected situations that need to be addressed. Groups decide how to address the situations, determining which have higher priority, and where to fit them into the schedule for the week. Groups can schedule time for these tasks anywhere on the calendar, including Monday. Not every situation requires an appointment, but time still needs to be set aside to complete tasks such as entering comments, returning phone calls, etc. Groups share their strategies for handling the unexpected changes.

Trainer Instructions to Learners: Just like in real life, other situations will arise during the day that require your attention. These could be walk-ins, phone calls, emails, etc. For the second part of this activity, please refer to page 10 to see what else comes across your desk today. Allocate time on your weekly calendar to handle these unscheduled tasks, keeping in mind that some tasks may be a higher priority. Some tasks do not necessarily need an appointment, but you still need to allot time to complete them. If you choose to schedule a task later in the week, you will need to note any actions you have to take today. The appointments and tasks already scheduled for the week are blocked out on your calendar on page 9, and you will need to schedule around those. After finalizing your schedule, answer the questions on page 11.

Debrief Questions:

- What approach did your group take to prioritize and schedule the new tasks?
  Answers will vary.

- How did you use your downtime from the cancelled appointment?
  Answers will vary.

- Which decisions were easy for your group to make? Which decisions were more difficult for your group to make?
  Answers will vary.

- Who else could you partner with to accomplish some of the tasks?
  Possible responses: Job Developer, Emergency Assistance Specialist, etc.

- What actions do you still need to take today for tasks you scheduled later in the week?
  Possible responses: Comments, Phone Calls, Schedule Future Appointments, Send email

Dealing with Unexpected Downtime

PPT 23

PG 12

We often dream of having downtime at work, but when we get downtime, we don't know how to use it properly.

Note to Trainer: If necessary, refer back to the activity where a participant cancelled her appointment, and how the class handled it.

When you feel overwhelmed, it is easy to lose focus and not make the best use of your downtime.

Breaks are needed to stay balanced and effective on a daily basis; however, keep in mind your agency's policies on breaks and the need to respect your co-workers' time. Not everyone in the office will be taking a break at the same time. You do not want to become a distraction for your co-workers.

Ask What are some tasks you can complete in your downtime?

Possible responses:
- *Re-visit your To-Do List*
- *Review your schedule for tasks you were unable to finish or for upcoming tasks that may need some preparation*
- *When finishing entries from an earlier appointment, take a step back to look at the file and make sure you remember everything that went on before entering comments*
- *Have a standard list of quick tasks that could be completed*
- *Get organized*
- *Plan out your future schedule*
- *Increase your knowledge*
- *Catch up or get ahead*
- *Tackle the tasks that always seem to get put on the back burner*

Note to Trainer: If you feel the class needs additional help identifying which tasks are higher priority, it may help to ask what they think are back burner tasks.

Quick Tasks

☼ PPT 24

PG 13

Review the list of quick tasks in the participant guide.

Use the list to identify tasks you could complete when you have 15 minutes or less of downtime, and when you have about 30 minutes of downtime.

It may be helpful to keep this list handy as a reference when unexpected downtime occurs. Add your own quick tasks at the bottom of the list in your participant guide.

Ask What tasks did you add?

Possible responses:
- *Print documents you use regularly so you have them readily available for the next week or two*
- *Follow up on POP claims or verification needed*
- *Reschedule appointments that did not show*
- *Send out or follow up on releases, formal assessments, etc.*
- *Make sure you have scheduled time for upcoming eligibility reviews*
- *Call a worksite to check on a participant's progress*
- *Review worker tasks*

Time Management Takeaway

☼ PPT 25

Think of all the time management and prioritization tips we've discussed so far today. In the blank space at the bottom of page 13 in your Participant Guide, write down one important point you will take back to the office with you. We'll give you a few minutes to jot it down.

Ask Let's hear from a few of you. What is your takeaway?

Note to Trainer: If there are any tips listed on the Toolbox flip chart paper, share them with the class.

Professional Boundaries

☼ PPT 26

PG 14

Managing your schedule is just one example of setting a healthy boundary. Professional boundaries are essential in many jobs. This is especially true as a Case Manager, where you are working closely with individuals and families, and discussing sensitive, personal issues.

Perceptions

☼ PPT 27

Before we set professional boundaries, we need to consider our perceptions. Our own perceptions and biases, and those of W-2 participants, impact our relationships, which can affect our boundaries. Ideally, we work together in an equal partnership toward the same goals. However, participants may perceive that we hold all the power.

Ask Why do you think they might feel that way?

Possible responses:

- *You represent authority*
- *You have information*
- *You use specialized language (acronyms)*
- *You control the money (determine eligibility, decide placement, and make good cause determinations)*
- *Appointments take place in your space (you decide what time and how long)*
- *You ask the questions*
- *You're associated with the government*

Just like participants hold the perception that we have all the power, we may hold varying perceptions about participants.

Diversity Activity - Trivia

☼ PPT 28

Purpose: To see how easy it is to make incorrect assumptions about others and realize the importance of checking our perceptions.

Materials: Popsicle sticks of four different colors, equally distributed among the class, one for each learner. Printed copies of the trivia quizzes from TN Appendix A (use a different version for each group). Buzzer, chime, or bell for learners to ring when they finish the quiz.

Estimated Length: 20 minutes

Directions to Trainer: Have four tables set up prior to the activity, each with a different version of the trivia quiz from Appendix A and a different sheet of colored paper (corresponding to the color of the popsicle sticks). Place the quizzes face down. Do not let learners know there are different versions of the quiz. When a group member comes to notify you that their group is finished, have them ring the bell, hit the buzzer, or strike the chimes.

Trainer Instructions to Learners: Let's switch gears for a bit and have a trivia competition. Find the popsicle stick that is at your seat. Take a pen and go to the table with the sheet of colored paper that matches your popsicle stick. Do not look at the papers on the table until I tell you to begin. Work together with your group to answer the questions, but be quiet so that other groups do not overhear. You will have 6 minutes. When your group is finished, have one member notify the trainers, and then return to your group. When I say "Go" flip over the quiz and begin. What can I clarify before we start?

☼ PPT 29

Click to start the music. **Click** a second time to start the timer

Expected Result: Learners assume they all have the same quiz. Some groups finish much faster than other groups (based on the difficulty of their version of the quiz). Some groups become frustrated that other groups finished so quickly.

☼ PPT 30

Let's go over the answers. 1. Rosh Hashanah. 2. 0. 3. Red.
4. Commodores. 5. 19. 6. Brazil. 7. Venus.
8. Richard Nixon. 9. Pride. 10. Philadelphia. 11. The Black Pearl.
12. A box of chocolates. 13. AB-Negative. 14. A heart. 15. Kansas.

You can now return to your seats.

Discussion Points:
- Tell me about your experience when completing the quiz?
  - *Answers are expected to vary based on differing quiz versions.*

- Why do you think some groups found it easier and finished faster?
  - *If learners do not ask, bring up the different versions of the quiz and point out the differences (multiple choice, multiple choice with answers, solely questions, solely questions with very small font size).*

- Did you assume you all had the same quiz? Why is that?

While everyone had the same questions, some groups had certain advantages that other groups did not. These groups did not ask for these advantages, and they may not have even realized they had them, but it impacted the outcome nonetheless.

- Before you knew about the different versions of the quiz, how did you perceive the other groups?
  - *Slow or lazy. Must be cheating.*
- What would have helped you change your perception of the other groups?
  - *Seeing their quizzes to understand their struggles or advantages.*

It can be easy to make assumptions about others, even if you know very little about the participant's story. Our perceptions are often shaped by our assumptions, so it's important to get to know the participant beyond your initial perception.

Can you solve it?

☼ PPT 31

Purpose: To see how biases impact our perceptions.

Materials: The Monkey Business Illusion video clip for the second part of the activity: https://www.youtube.com/watch?v=IGQmdoK_ZfY

Estimated Length: 20 minutes

Directions to Trainer: Part One – Learners will attempt to guess the rule or pattern a sequence of numbers follow by proposing their own number sequences. The trainer will tell them if their sequences follow or do not follow the rule. The answer is that the numbers are in ascending order. Keep going until a learner guesses the correct answer, or until learners have guessed incorrectly for 5 minutes.

Part Two – Show learners The Monkey Business Illusion video in the PPT.

Trainer Instructions to Learners: I'm going to give you a three-number sequence, and I have a rule in mind that these numbers obey. I want you to try to figure out what that rule is. You can get information by proposing your own set of three numbers, to which I will say, 'Yes, that follows my rule' or 'No, that doesn't follow my rule'. If, at any time, you think you've figured out the rule, let us know.
Here are the three numbers: 2, 4, 8.

Ask What is the rule?

Note to Trainer: If learners have not guessed the correct answer within 5 minutes, provide them with the answer.

The answer is that the numbers are in ascending order.

Usually when people try to solve this puzzle, they look for number sequences that fit the pattern, instead of looking for sequences that do not fit the pattern. This is a type of bias called a confirmation bias. This type of bias can impact our perceptions because it leads us to look for confirmation of our initial beliefs or assumptions.

☼ PPT 32

Let's watch a short video that deals with unconscious bias and our perceptions.

Click to start the video.

Debrief Questions:

- Who noticed the gorilla?
- Did anyone notice the participant who left or the curtain changing color?
- For those of you who did not notice all these occurrences, why do you think you missed them?
  - *Possible Responses: I was focused on counting the passes, That's not what I was looking for, I wasn't expecting to see those things*

When working with W-2 participants, we need to be conscious of our potential biases, and make sure we are not solely trying to confirm our initial beliefs, or only see what we are looking for or expecting to see.

Ask Have you ever experienced a time when your original perception of a W-2 participant was proven wrong? If you have, how did this impact the relationship

It's important to be aware of our perceptions and the impact they have on W-2 participants. Even though it may be easier to empathize with some rather than others, we need to treat all fairly. Always consider how your perceptions may impact your impartiality.

☼ PPT 33

This does not necessarily mean treating everyone equally. For example, although you apply policy rules equally, you do not provide everyone with the same accommodations. These are applied based on individual needs and strengths. Look at the equality versus equity image in your participant guide. In the first image, you can see that treating everyone equally is not the fair thing to do. In the second image, we see that treating everyone according to his or her individual needs is more equitable.

Take a moment to answer the question at the bottom of page 14 in your participant guide.

After everyone at your table finishes answering the question, share your responses with each other.

Zone of Helpfulness

☼ PPT 34

PG 15

In addition to our perceptions impacting our professional boundaries, we also need to remain in the zone of helpfulness to maintain healthy boundaries. We must decide to be neither under-involved nor over-involved in our participants' lives. If we are under-involved, we run the risk of not listening to participants or not even providing services. Yet if we are over-involved, we may not exhibit good judgement, and we are not helping participants to help themselves.

What Do You Think? Activity

Let's practice staying in the zone of helpfulness by answering some questions that address situations where workers may be over- or under-involved with participants.

☼ PPT 35

PG 16

Purpose: To generate and guide discussion on professional boundaries.

Materials: CPS Unit, CPS File for "What Do You Think?" activity

Estimated Length: 15 minutes

Directions to Trainer: Open the CPS File for the "What Do You Think?" activity. Read through the first question, then allow time for the learners to respond using their CPS clicker. Reveal the answer. Repeat for all questions.

Trainer Instructions to Learners: Use the clicker in front of you to answer each question as it appears on the screen. The questions are all true or false, and came from curriculum developed by the Center for Human Services at the University of California. All answers are anonymous. The questions are also listed in your participant guide.

Note to Trainer: Provide the information in italics below each statement if needed for clarification based on learners' responses.

1. A worker never should accept a gift from a participant.
   True. Accepting gifts can be seen as role reversal, shifting the focus of the relationship from participant to worker. Discussion: Can you ever accept something tangible? What about a token or a small gift?

2. Participants always should be informed about how the worker will deal with confidential information about their life.
   True. Participants have the right to be informed who will see their information and why those individuals will see the information.

3. It is permissible for a worker to have lunch with a participant to discuss the case in a less formal setting.
   False. Keeping a boundary around where worker-participant interactions take place avoids concerns about participant confidentiality, who prepares or pays for the meal (potential power issue), appearance of favoritism, etc.

4. A worker who has been assigned a participant he or she knows socially should notify his or her supervisor.
   True. This is a conflict of interest as well as potentially causing boundary conflicts. Any time a worker is assigned a case involving a friend, the case should be transferred to a worker who does not in any way have social contact with the participant.

5. A worker never should give a participant his or her home phone number.
   True. Worker-participant interactions should take place in a work context, which is usually in an office during office hours. (One exception: agency after-hours or on-call policies)

6. A worker may date a participant if two years have passed since the participant received services.
   True. Although this is true, it is not at all recommended. It can be construed as a conflict of interest. Also, if the participant needs services in the future, the participant must seek services from someone else (which can be a problem in small counties). Whether the romantic relationship works or doesn't work, the participant's access to certain services may be limited.

7. If a participant verbally threatens a worker, the worker should accept that it is part of the job.
   False. Threats that could escalate to physical harm need a higher level of response and should follow agency policy and practice.

8. If a participant invites a worker to a family wedding, it is acceptable for the worker to attend.
   False. In general, seeing participants outside of work violates the intent of the worker-participant relationship: to provide services to the participant.

9. If a participant dies, the worker may attend the service as long as he or she does not disclose their relationship.
   True. The worker has a responsibility to maintain confidentiality for the sake of the participant and the participant's family.

10. It is okay to pay a participant reasonable wages to work for a W-2 worker (yard work, house cleaning, child care).
    False. The worker's position of authority may make it difficult for the participant to refuse the request. The worker also may have a conflict about reporting participant income.

11. Workers should not allow their children to invite a participant's child to their birthday party, even if they're classmates.
    True. Workers need to guard participant confidentiality and keep the focus of the worker-participant relationship on provision of services.

PG 15

Turn back to page 15 in your participant guide and review the questions at the bottom of the page.

Ask Does your agency have any kind of ethics or boundaries policies? For anyone who answered yes, what are some of your agency's policies?

Ask If you have a question about whether you potentially may be crossing a boundary, to whom would you go for advice?

Boundary Violations

PPT 36

PG 17

There are different types of boundary violations. We'll be touching on a couple of them in detail today: *Self-Disclosure* and *Dual Relationships*.

Self-disclosure occurs when you reveal information about yourself to a participant. At times, this can be beneficial to share tips, strategies, and resources. It strengthens relationships by helping case managers and participants relate to each other. However, it should be used **only** if it will benefit the participant.

The best way to use self-disclosure is with a Motivational Interviewing technique called A-O-A.

PPT 37

A-O-A stands for *Ask* – *Offer* – *Ask*. This means first ask the participant if it's okay to share the information, Next, you offer the information, Finally, you ask the participant for their thoughts. Here's what it would sound like:

First you ask permission - "You mentioned you're having some trouble with your son skipping school. Last year, I had some truancy issues with my son, too. Would you mind if I shared something that I found helpful?"

Second, you offer the information - "The Family Resource Center provided free counseling and tutoring sessions. This really helped us both get back on track."

Lastly, you ask for a response - "Do you think that's something your family would be interested in?"

PPT 38

Now that you know how to use self-disclosure in a more effective way, let's take a look at what to avoid.

Telling your life story - You can talk about pieces of your life that seem appropriate to the participant's situation without telling a long, drawn out story.

Too frequent personal references - Most of your time should be spent listening and encouraging participants to talk about themselves. You do not need to share a personal story every time one comes to mind.

Talking about your problems - Participants are coming to you for help. They don't want to be your counselor. Share solutions, options, and resources, not complaints.

Sounding condescending - An example of this is, "I've had jobs I didn't like either, but I sucked it up and stuck it out because I had to. You can, too." This sounds like you don't care at all about the participant's concerns.

Talking about resources that do not apply - Example: "I am so sorry you don't have any family support. When I went through my divorce, I really leaned on my mother, and she was a huge help with the kids."

PPT 39

PG 18

The other common type of boundary violation is dual relationships. Under most circumstances, it is unethical as a professional to have a dual relationship with a participant. In some situations, it is unavoidable, such as in rural areas, small communities, and cultural and ethnic communities. If you are faced with this type of situation, reach out to your supervisor for assistance.

Note to Trainer: Record the answers for the following two questions on a whiteboard or flipchart paper.

Ask What are some examples of dual relationships?

Possible responses:
- *Children are friends/classmates*
- *Know each other's family members*
- *Regularly attend the same church/store/support group*
- *Used to be friends/classmates*
- *Mutual friends*
- *Same business contacts (hairdresser/auto mechanic)*
- *Similar interests, attend the same social events (concerts/clubs)*

Ask How can a dual relationship harm the W-2 participant and Case Manager's professional relationship?

Possible responses:
- *Appearance of favoritism*
- *Confused boundaries*
- *Feels uncomfortable*
- *Participant may not want to disclose personal information*
- *Confidentiality concerns*

Ethical Scenarios Activity

☼ PPT 40

Purpose: To practice decision making regarding potential boundary violations.

Materials: Ethical scenarios listed on page 19 of the PG

Estimated Length: 10 minutes

Directions to Trainer: Allow table groups to choose a scenario to discuss (Alaina, Kenzie, Greg, Jayden). It is okay if groups pick the same scenarios or if some scenarios do not get picked.

Trainer Instructions to Learners: Read the scenarios on page 19 In your table groups, choose one scenario to discuss. With your group, answer the questions corresponding to your scenario. The person with the longest fingernails will be the reporter.

Ask groups to share their responses.

Note to Trainer: If time allows, **ask** the large group how they would handle any scenarios that were not chosen by small groups. Potential issues to consider for each scenario are listed in italics after the scenario in TN Appendix B.

Tips for Setting Professional Boundaries

PPT 41

PG 20

We've discussed why boundaries are necessary, but what about how to set them? Here are some tips for setting professional boundaries.

Communicate clearly – Know where your boundaries lie and be clear in sharing this information with others. How much easier would our lives be if everyone was upfront about their boundaries from the first time we met?

Practice saying no – If someone makes a request of you that violates one of your boundaries, it's okay to say no. Do not feel guilty, and do not feel obligated to explain your reasoning.

Create structure – Set agendas for meetings and hold to specific start and end times.

Be proactive – If you don't know what someone else's boundaries are – ask! This will avoid confusion or misunderstanding.

Set boundaries at home – Maintain a healthy work/life balance. Keep your work at work.

High Five for Tips Activity

PPT 42

Purpose: To share group knowledge and expertise on setting professional boundaries.

Materials: Small post-it notes (at least five for each learner)

Estimated Length: 10 minutes

Directions to Trainer: Have small post-it notes on tables. Learners write tips on the post-it notes and then display the notes on their fingers. They walk around the room and read the each other's notes, exchanging notes they like from others. Demonstrate what you want learners to do by putting post-its on your finger and exchanging with your co-trainer.

Trainer Instructions to Learners: *Part One* – Think about tips you can use to set professional boundaries. Using the small post-it notes on your table, write one tip for setting professional boundaries per sheet. Try to come up with five tips. When you're finished, place your post-it notes on your fingers like this. You have five minutes.

Part Two, after five minutes – Now walk around and find another person. Review each other's tips. Then take one tip that you really like from the other person, and they will take one of your tips that they like. Place the new tip on your finger, find another person, and repeat the process. Keep going until I say stop.

Click PPT to start music.

Note to Trainer: The music will play for five minutes. **Click** the PPT if you would like the music to stop before the five minutes is up.

Professional Boundaries Pointer

PPT 43

Take a moment to look at the five tips you collected. Choose one as the pointer that you will take back to the office with you.

Ask Let's hear from a few of you. What is your pointer?

Note to Trainer: If there are any tips listed on the Toolbox flip chart paper, share them with the class.

Self-Care

PPT 44

PG 21

Boundaries are an important component of self-care for case managers. The people we serve have complicated and often overwhelming issues and concerns. To help them through their journey, we must create a culture that values self-care. It's not always easy to take care of ourselves. Demands from work, family, and friends can downgrade self-care to the bottom of your to-do list. But self-care is essential. It is not a sign of weakness. In fact, it is a way of making our minds and bodies stronger, enabling us to continue doing the important work we do.

☼ PPT 45

Have you ever heard the phrase, "If you don't make time for your wellness, you'll be forced to make time for your illness"? This doesn't apply only to physical health. For case managers who do not make time for self-care, potential "illnesses" could include burnout, compassion fatigue, and vicarious trauma.

☼ PPT 46

Burnout is physical and emotional exhaustion caused by feeling powerless and overwhelmed at work.

Compassion fatigue is a diminished ability to empathize or feel compassion for others caused by exposure to those suffering from traumatic events.

Vicarious trauma is the profound shift in world view due to working with participants who have experienced trauma. This is when your fundamental beliefs about the world are altered and possibly damaged by being exposed repeatedly to traumatic material.

Self-Assessment Activity

☼ PPT 47

Purpose: Learners assess their own level of compassion satisfaction and potential risk for compassion fatigue.

Materials: Printed copies of the PROQOL Self-Assessment (one for each learner). Pen or pencil for each learner.

Estimated Length: 15 minutes

Directions to Trainer: Learners complete and score their own self-assessments.

Trainer Instructions to Learners: We're going to take a self-assessment for you to gauge your own level of compassion satisfaction and see if you have any potential areas of concern. This assessment does not provide any type of diagnosis, and your score may change, depending on the type of day you're having. When you're finished answering the questions, add up your score on the following pages.

Click PPT to start music.

Note to Trainer: Click the PPT to stop the music after 15 minutes has passed or everyone has completed the assessment.

Ask What surprised you about your score?

If you have any concerns about your score, you may want to check out the CBT in the Learning Center titled, Secondary Trauma.

Self-Care Strategies

☼ PPT 48

PG 22

In addition to strategies for managing your time well and enforcing your boundaries, we'll look at some strategies for self-care.

It is important to try various self-care activities so that you find those that work best for you. Taking time for yourself should be enjoyable; if it feels like a chore, try something else.

Read the list of self-care strategies in your participant guide, and put a star next to the activities you already do regularly.

Now go through the list again, and put a heart next to the activities you want to try.

Ask What else would you include on this list if you were providing self-care strategies for a new case manager?

Possible Responses: Take breaks, Keep regular work hours and stop thinking about work when the business day is over, Find healthy hobbies, Go outside, Take a walk

Deep Breathing & Mindfulness

☼ PPT 49

One of the simplest things we can do to combat stress is to breathe. Deep breathing doesn't take long, doesn't require any special equipment, and can be done almost anywhere. Here's a chance for you to try it.

Sit up straight.

Take a long, slow deep breath through your nose.

Stand up.

Take a deep breath, feeling the air going into your lungs.

Make yourself aware of the path that the air is taking as it enters and leaves your body. Put your hand on your abdomen, feeling it expand and contract with each breath. Put your hand on your chest, feeling it expand and contract with each breath.

Focus on your breathing for at least two minutes, noticing how your body responds.

Click PPT to start music.

Note to Trainer: The music will play for two minutes, allowing learners to focus on their breathing.

You can try deep breathing at your desk, when stuck in traffic, or anywhere you need to refocus.

Another easy self-care strategy is to practice mindfulness.

PPT 50

Mindfulness is defined as simply paying attention to right now, on purpose, from a place of kindness and curiosity, and without judgement.

PPT 51

PG 23

You can practice mindfulness through *meditation*. This could be as simple as sitting quietly and being aware of your breath. There also are many free apps and online resources for guided meditation.

Another way to practice mindfulness is through *yoga*. You could join a structured class, or practice in your own home by watching YouTube videos.

A third way to practice mindfulness is through *movement*. This could be walking, dancing, or martial arts, such as tai chi.

A fourth type of mindfulness activity is *gratitude* journaling. There is no wrong way to keep a gratitude journal, but experts recommend quality over quantity. It's better to be specific and write in depth with detail about one thing you are grateful for, rather than simply jotting down a laundry list of items.

Prioritizing Self-Care

PPT 52

PG 24

One of the most common excuses for a lack of self-care is, "I don't have time." However, self-care does not have to be time-consuming. Read the list of ideas in your participant guide for self-care activities that you can do in 2 minutes, 5 minutes, 10 minutes, and 30 minutes.

Gallery Walk - Self Care Suggestions

PPT 53

Purpose: Learners contribute and share ideas for various self-care practices.

Materials: One marker per group. Prepared flip chart paper hung up around the room, one with each of the following headings:

- 2 Minutes
- 5 Minutes
- 10 Minutes
- 30 Minutes

Estimated Length: 10 minutes

Directions to Trainer: Divide learners into four groups. Have prepared flip chart paper hung prior to this activity. In groups, learners walk around the room, adding their ideas for self-care practices, based on the amount of time given at the top of the flip chart paper. Every 2-3 minutes have groups rotate to a different flip chart paper. Instruct learners to review the current list, then add any additional ideas. Continue this until all groups have the opportunity to add their ideas to each flip chart paper.

Trainer Instructions to Learners: Let's expand on these lists. I'm going to divide you into four groups, and each group will go to one of flip chart papers hanging on the wall. Each group will need a scribe. Add additional ideas for self-care, based on the time frame given at the top of the page. Every few minutes, groups will rotate to a different flip chart paper. Review the list and add any additional ideas. We will continue to rotate until all groups have the opportunity to add their ideas for each timeframe.

Take a moment to look at all of the self-care suggestions we compiled. Add any additional ideas for self-care that stood out to you to the list in your Participant Guide.

Ask What is a suggestion you noticed that you hadn't thought of? Which self-care suggestions are you eager to try?

Connections

☼ PPT 54

We've reviewed some ideas for how you can practice self-care, but it's not just about you. Self-care doesn't happen in isolation; you also need to maintain positive relationships. Self-care can be as much about spending time in the company of others as it is about making time for ourselves. It is important to recognize that some of our connections may not be sources of support, and may, instead, weigh us down or contribute to our stress.

Personal Network Profile Activity

☼ PPT 55

PG 25

Purpose: Learners create their own support network and evaluate strengths and weaknesses.

Materials: Personal Network Chart on PG 25

Estimated Length: 20 minutes

Directions to Trainer: Give learners a few minutes between each step of the instructions to complete that step before moving on to the next step. Click at each step of the instructions to display abbreviated directions on the PPT.

Trainer Instructions to Learners: Let's examine your support network with an activity that comes from material developed by Wisconsin Department of Health Services, Division of Quality Assurance and the University of Wisconsin-Oshkosh Center for Community Development, Engagement and Training (CCDET) as part of the federal Caregiver Abuse and Neglect Prevention Project.

1. In each category, write the names of up to four people you turn to for support in that category. It's okay if you cannot come up with four people.
2. Assign each person a number, based on how helpful they are. 1 = not helpful; 5 = very helpful.
3. Circle the categories where you feel that you need or would like more support.
4. Put an "x" next to members of your network who you rely on too much.
5. Put a star next to people you might rely on more often.

Ask What struck you as you identified your support network?

Answers will vary depending on individual learners' strengths and experience.

Finding the Inspiration: Why Cube Activity

PPT 56

PG 26

Working to help others can be stressful and exhausting. At times, organizations may deal with financial difficulties, staff shortages, and unrealistic demands. In the midst of this chaos and stress, it is helpful to take the time to step back and remember why you are doing this work, and what keeps you going in times of difficulty. We all have bad days at work, but there also are moments and days that remind you why you work in this field.

Purpose: Learners create a Why Cube as a physical reminder of their own motivation.

Materials: White foam cube, unassembled, and permanent markers (can be multi-colored; at least one for each learner)

Estimated Length: 15 minutes

Directions to Trainer: Complete a cube prior to class to show as an example if needed. Have cubes and markers on the tables. Learners write their answer to each question on one side of the foam cube with a marker. They then put the cube together by punching out the foam pieces and pushing the ends together. The questions from the participant guide are listed in italics below.

1. *What is the most rewarding moment at your job?*
2. *What do you love about your job?*
3. *Whose lives have you touched? (Initials only)*
4. *Why did you take your current job?*
5. *What is a compliment you have received from a co-worker or supervisor?*
6. *What is something you do well?*

Trainer Instructions to Learners: Read the questions on the puzzle pieces on page 26 of your guide. Using a permanent marker, write your answers to these questions on the foam pieces, one answer per piece. When you are finished, assemble your cube. If you would like to keep your answers private, you may assemble the cube with your answers facing inward.

Note to Trainer: Pass out evaluations while learners are finishing up their why cubes.

It may be helpful to keep your cube on your desk once you return to your office, as a reminder of your "why".

Closing

PPT 57

Effective time management, setting and maintaining professional boundaries, and practicing self-care will help you feel fulfilled in your role as a Case Manager, along with improving your case management skills.

Sentence Prompts

PPT 58

Let's close out the day by hearing your take-aways. Read the sentence prompts on the screen, and decide which one you would like to complete. We will give you a couple minutes to come up with your sentence.

Let's go around the room and hear from each of you.

PG 31 - 46

Appendix D contains a list of tools for you to use back at your office or at home as needed to help with time management, maintaining professional boundaries, and self-care.

Trainer Appendix A – Trivia Quizzes

Trivia Quiz

1. What is the name for the Jewish New Year?
    a. Hanukkah
    b. Yom Kippur
    c. Rosh Hashanah

2. How many blue stripes are there on the U.S. flag?
    a. 7
    b. 13
    c. 0

3. What is the color of Donald Duck's bowtie?
    a. Red
    b. Yellow
    c. Blue

4. What was the name of the band Lionel Richie was a part of?
    a. King Harvest
    b. Spectrums
    c. Commodores

5. On a dartboard, what number is directly opposite number 1?
    a. 6
    b. 15
    c. 19

6. Which country held the 2016 Summer Olympics?
    a. China
    b. Brazil
    c. Italy

7. Which planet is the hottest?
    a. Venus
    b. Saturn
    c. Mars

8. Who was the only U.S. President to resign?
    a. Herbert Hoover
    b. Richard Nixon
    c. George W. Bush

9. What is a group of lions called?
    a. Pack
    b. Herd
    c. Pride

10. In which city can you find the Liberty Bell?
    a. Washington, D.C.
    b. Boston
    c. Philadelphia

11. In *Pirates of the Caribbean,* what was the name of Captain Jack Sparrow's ship?
    a. The Marauder
    b. The Black Pearl
    c. The Slytherin

12. According to Forest Gump, "life was like…"
    a. A bag of lemons
    b. A handful of roses
    c. A box of chocolates

13. What is the rarest blood type?
    a. O
    b. A
    c. AB-Negative

14. In *The Wizard of Oz*, the Tin Man wanted to see the wizard about getting …
    a. A brain
    b. An oil can
    c. A heart

15. Which U.S. state is known as the Sunflower State?
    a. Florida
    b. California
    c. Kansas

Answer Key: 1.c, 2.c, 3.a, 4.c, 5.c, 6.b, 7.a, 8.b, 9.c, 10.c, 11.b, 12.c, 13.c, 14.c, 15.c

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Trainer Appendix B – Ethical Scenarios

Alaina:

You are meeting with a W-2 applicant, who is a mother of three children. She is facing the breakup of her marriage. She is very concerned about how her children will respond, what steps she can take to minimize the disruption to their lives, and how she will manage financially with the reduced income. Do you decide to relate your own experience of divorce and the parenting issues that followed? Explain your decision.

If groups choose to self-disclose, what is the purpose? It should only be done if it would be helpful to the participant. Did they use the A-O-A method?

Kenzie:

A favorite participant is removed from your caseload due to moving out of the area. After several years, you see her at a shopping mall. She offers to take you to the food court for lunch to show appreciation for all the help you provided during the time she was on W-2. Do you accept? Why or why not?

If groups choose to accept the lunch meeting, did they let the former participant pay for the meal? Would they pay for the meal? Would they each pay for their own meals? Because of the lapsed time, accepting the meal does not pose a boundary violation. However, what happens if the former participant needs to reapply for W-2? What if another current participant sees you eating with the former participant?

Greg:

You have a participant who recently became a CMF after gaining employment at a small tax accounting business. He has shared with you that the business is struggling, and he does not know what he will do if the business fails. He asks to prepare your taxes this year. What do you say?

Exchanging money for goods or services with a current participant is generally considered a boundary violation. It could be seen as favoritism. If groups choose to decline the tax preparation offer, did they offer any other way to help out the participant? For example, could they allow him to advertise his business on a community bulletin board in the lobby?

Jayden:

Jayden is your neighbor's daughter. Your neighbor stopped by yesterday to tell you that Jayden is applying for services as she desperately needs help finding a job. Your neighbor asks you to do anything you can to help her. Your neighbor helps you out a lot and has never asked for anything in return. When you get back to the office, you see 10 submitted applications via ACCESS. Jayden's application is 8th. It looks like she was able to select an interview appointment 3 days from now, but you did have a cancellation this afternoon. How will you proceed?

While you may feel a personal obligation to help your neighbor's daughter, you must follow policy and process applications accordingly. This includes treating each applicant and participant fairly. It may be best to talk out the situation with your supervisor and have a colleague process Jayden's application to avoid a potential conflict of interest.

- Some scenarios are modified from WEST CAP, Ethics and Boundaries in Helping Professions curriculum