

**A Training Curriculum  
for Social Work Students in  
California Departments of  
Adult & Aging Services**

Barrie K. Robinson, MSSW

Andrew E. Scharlach, PhD

School of Social Welfare  
University of California at Berkeley  
Berkeley, CA 94720-7400

April 30, 2004

These materials were developed by the Consortium for Social Work Training in Aging with funds from the John A. Hartford Foundation of New York. Inquiries about the curriculum should be directed to the Project Coordinator, Barrie Robinson, at the School of Social Welfare, University of California, Berkeley ([bkr@berkeley.edu](mailto:bkr@berkeley.edu)).



# *Executive Summary*

This manual presents a training curriculum for social work students in county Departments of Adult and Aging Services (DAAS) in California. It was developed over a four-year period (1999-2003) by the Consortium for Social Work Training in Aging (CSWTA) with generous funding from the John A. Hartford Foundation of New York, as part of its Practicum Partnership Program, an innovative initiative to strengthen social work training in aging.

These materials are designed for use by Departments of Adult and Aging Services as well as social work education programs. Materials can be used to enhance current internships being offered by DAAS, as well as to establish new training programs. Our hope is that DAAS and schools of social work will work together to prepare increasing numbers of students to serve California's older adult population through the public aging services system.

Materials were tested and refined over a three-year period with cohorts of MSW students from three schools of social work in the greater San Francisco Bay Area. This model was shown to be very effective in providing comprehensive training in aging services. However, users of this manual will want to modify materials as needed to best accommodate their resources and training goals.



# *Consortium for Social Work Training in Aging*

## **Consortium Members**

### **University of California, Berkeley/School of Social Welfare**

James Midgley, Dean  
Barrie Robinson, Project Coordinator and Co-Principal Investigator  
Andrew Scharlach, Co-Principal Investigator  
Teresa Dal Santo, Project Associate  
Jesse Tamplen, Graduate Assistant  
Kelly Mills-Dick, Graduate Assistant

### **San Francisco State University/School of Social Work**

Eileen Levy, Dean  
Dianne Mahan, Director of Field Education

### **San Jose State University/College of Social Work**

Sylvia Rodriguez Andrew, Dean  
Barry Goldman-Hall, Director of Field Work  
Sara Tanehaus, Field Faculty Liaison

### **Alameda County Social Service Agency/Adult & Aging Services**

Linda Kretz, Director  
Reggie Henderson, Division Director of APS/Public Guardian

### **Contra Costa County Employment & Human Service Division/ Aging & Adult Services Division**

Robert Sessler, Manager  
Ruth Atkin, Analyst for Adult Protective Services

### **City and County of San Francisco Department of Adult & Aging Services**

Derek Lam, Executive Director  
Mary Counihan, APS Section Manager  
Cindy Bircher, Adult Protective Services Supervisor

### **San Mateo County Health Services Agency/Aging & Adult Services**

Charlene Silva, Director  
Pam Borrelli, Health Services Manager  
Chris Rodriguez, Supervisor of MSSP/Linkages, AIDS Case Management

### **Sonoma County Human Services Department/Adult & Aging Services Division**

Robin Schaefer, Division Director  
Diane Kaljian, Section Manager

### **Santa Clara County Social Services Agency/ Department of Adult & Aging Services**

Betty Malks, Director  
Jamie Buckmaster, APS Program Manager



# Table of Contents

<b>Introduction</b> .....	1
Development of the Training Curriculum.....	
Role of the Consortium for Social Work Training in Aging .....	
Some Outcomes of the CSWTA Training Curriculum .....	
<b>The Need for Training Professional Social Workers in Public Aging Services</b> .....	
The Demographic Imperative .....	
The Role of Social Work in Aging Services.....	
Impact of the Lack of Professionally Trained Personnel .....	
Aging Services Personnel in Public Social Services .....	
Hartford Foundation Initiatives for Strengthening Social Work Training in Aging.....	
<b>Overview of the Training Curriculum</b> .....	
Rationale .....	
Goals and Objectives of the Curriculum.....	
Overview of Training Methods .....	
<b>Components of the Training Program</b> .....	
<i>Primary Program Area</i> .....	
Selection of Primary Program Areas.....	
Orientation to Primary Program Areas .....	
Student Assignments in Primary Program Areas .....	
Guidelines for Case Assignments .....	
<i>Program Rotations</i> .....	
Suggested Content of Program Rotations .....	
Implementing the Program Rotations.....	
<b>Training Coordinator and Field Instructor Responsibilities</b> .....	
<i>Training Coordinators</i> .....	
<i>Field Instructors</i> .....	
Field Instructor Responsibilities.....	
Recruiting Field Instructors .....	
Availability of Qualified Field Instructors .....	
Training for Field Instructors.....	
<b>Student Recruitment and Curricular Support</b> .....	
Recruiting, Interviewing and Selecting MSW Students .....	
Providing Curricular Support to Students.....	
Providing Curricular Support to Students.....	
<b>Evaluation</b> .....	
<b>Conclusion</b> .....	

*Appendix A: Sample Intern Rotation Schedule*

*Appendix B: Hartford Practicum Partnership Program: Geriatric Social Work Competency Scale*

*Appendix C: Sample Student Satisfaction Survey*

*Appendix D: Sample Field Instructor Satisfaction Survey*

## LIST OF TABLES

Orientation Activities.....	
Factors to be considered when determining caseload assignments.....	
Sequencing of learning activities.....	
Guidelines for Casework Assignments.....	
Program Rotation Activities.....	
Area Agency on Aging (AAA).....	
In-Home Supportive Services (IHSS).....	
Adult Protective Services (APS).....	
Public Guardian/Conservator Program (PG).....	
Multi-Purpose Senior Service Program (MSSP).....	
Training Coordination Activities.....	
Guidelines for Selecting Field Instructors.....	
Estimate of Field Instructor’s Time.....	
Sample Field Instructor Commendation Letter.....	
Sample Training Outline for Field Instructors.....	
Sample Description of Student Internship.....	
Sample Student Internship Applications for Departments of Adult & Aging Services.....	
Sample Questions for Student Interviews.....	
SEMINAR OUTLINE: An Overview of the Aging Services Network.....	
SEMINAR OUTLINE: The Aging Process.....	
SEMINAR OUTLINE: Health and Illness in Later Life.....	
SEMINAR OUTLINE: Cognitive Changes in Later Life.....	
SEMINAR OUTLINE: Competence Determination and Informed Consent.....	
SEMINAR OUTLINE: Mental Illness In the Elderly.....	
SEMINAR OUTLINE: Cultural Competence in Working with Older Adults.....	
SEMINAR OUTLINE: Careers in Aging.....	

# *Introduction*

## **Development of the Training Curriculum**

The Consortium for Social Work Training in Aging (CSWTA) developed this training curriculum over a four-year period (1999-2003) with the support of a grant from the John A. Hartford Foundation of New York. This project was one of six national sites funded as part of several initiatives to strengthen social work training in aging. These grants, referred to as the Practicum Partnership Programs (PPP), were designed to create innovative internship models for training MSW students to work effectively with the elderly. Sites were chosen by the foundation after a competitive process in which fifty MSW programs from around the country submitted proposals for creating training models based on guidelines established by the foundation. These guidelines included the creation of consortia of agencies and MSW programs, and the incorporation of rotations among aging programs in order to expose students to the continuum of populations and aging services.

The School of Social Welfare at the University of California, Berkeley, drafted the original training model for this project, and also served as the lead agency in the development of the CSWTA. Representatives from schools of social work at San Jose State and San Francisco State University, as well as from departments of adult and aging services from the greater San Francisco Bay Area, were then invited to participate in the development of a consortium. The CSWTA was charged with the task of preparing a detailed plan for implementing the training model during the period from 1999-2000. At the end of this period, the CSWTA was among six sites that received implementation funding for three more years.

Of the six PPP projects funded by the Hartford Foundation, CSWTA was the only project that focused exclusively on public sector services. The

public sector was chosen for several reasons. First, county departments of adult and aging services (DAAS) serve the most vulnerable elderly and disabled adults, reflecting social work's basic mission. Consequently, it is essential for social workers to become familiar with public aging services, in order to provide effective service to these populations, and to become leaders in the field. In addition, all of the participating schools of social work are part of public universities with strong public service missions, and, consequently, are committed to developing MSW training sites in county departments. Also, there has been a relative lack of MSW internships in departments of adult and aging services. This represented a significant gap in training opportunities for MSW students interested in aging, as well as in developing a potential applicant pool for public sector employment in aging.

## **Role of the Consortium for Social Work Training in Aging**

CSWTA members were involved in every aspect of developing and implementing the training curriculum. This included setting goals for the training, developing a standard student application, reviewing all student applications and selecting students for the internships, developing guidelines for recruiting and selecting Field Instructors, designing a student seminar series, and developing and implementing program rotations.

Successful development of CSWTA hinged on gaining the commitment of DAAS directors at the beginning of the project. In practical terms, they were asked to commit significant staff resources to the project by appointing representatives who would attend monthly and then quarterly meetings throughout the grant period, and who in most cases also served as Training Coordinators in their departments for the duration of the grant.

In addition to developing an innovative training model, the CSWTA provided a unique opportunity for direct collaboration among DAAS and MSW programs. The regular CSWTA meetings provided members with opportunities to explore training issues, and exchange information with a peer group that is typically not available in their agencies. While all members have benefited, this collaboration has been especially helpful to those members who have not trained MSW students previously. Examples of specific training issues that were discussed include recruitment and support of Field Instructors, strategies for garnering the support and involvement of DAAS programs in working with students, the appropriate role of Training Coordinators, and screening and selection of students.

### **Some Outcomes of the CSWTA Training Curriculum**

A total of 68 students from the three participating MSW schools applied to the project during the three-year grant period. This is compared to approximately 10 students who indicated an interest in aging public internships for the three-year period before the project. This significant increase reflects the interest that students have in well-developed, comprehensive training experiences, as well as in the field of public sector aging services. During the project, a total of 54 separate internships were offered in six DAAS sites, and 37 MSW students from the three participating schools were

trained. This stands in contrast to the three-year period preceding the project, when only nine students were trained in four sites. These outcomes were due to the creation of new training infrastructures within DAAS, including the appointment of Training Coordinators and recruitment of Field Instructors. Another factor was the increased focus of the academic programs on recruiting students into public service internships.

An evaluation of the project provided evidence of the program's effectiveness in training and retaining social work students for work in the field of aging. At the end of their training year, 73% of the MSW Hartford Fellows indicated that it was very likely that they would take a job working with or on behalf of older adults, and almost 60% indicated that they had a particular interest in jobs in public social services. Agencies also reported that the Hartford Fellows demonstrated superior skills and knowledge in subsequent civil service job interviews as compared with other candidates.

Another important outcome of this collaborative partnership has been the increased understanding about the field of aging and public sector aging services that has been gained by the participating MSW programs. This has resulted in greater awareness that schools must provide curricular support for students in aging internships through courses and seminars, as well as specialized support for DAAS training staff, particularly the newly developing role of Training Coordinators within DAAS.

# *The Need for Training Professional Social Workers in Public Aging Services*

## **The Demographic Imperative**

Rapid increases in the size and diversity of the elderly population have prompted concerns regarding whether existing human and social resources were sufficient for meeting the needs of older persons. Particular concern has been expressed regarding the adequacy of aging services, and the availability and training of personnel providing those services. While most attention has been directed towards paraprofessionals or physicians, a number of recent reports have raised serious questions regarding the adequacy of professional social work services for older persons.<sup>1-7</sup>

The elderly population is growing rapidly. Persons over the age of 65 make up 13% of the U.S. population and by 2040 are expected to reach 21%.<sup>8</sup> The fastest growing segment of the elderly population is persons over 85 years of age, 46% of whom are disabled.<sup>9</sup> Not only is the population of older adults increasing, but also it is extremely diverse. Between 1990 and 2030 the non-Hispanic, white elderly population (those age 65 and older) is expected to increase by 93 percent, while the older minority population is expected to increase by 328 percent.<sup>10</sup>

California is at the forefront of these changes. The state is home to the largest population of people over 65 years of age compared to all other states

and is also the most diverse state other than Hawaii. In California, the population of people over 65 years of age is over 3.5 million and is projected to increase by 172% over the next 40 years.<sup>11</sup> In 2000 California's elderly population was 70.3% non-Hispanic white, 14.5% Hispanic, 9.7% Asian and Pacific Islander, 5% Black and 0.5% American Indian; however, by 2040 non-Hispanic whites will only make up 46% of the elderly in California.<sup>12</sup> These figures are causing administrators, practitioners, and consumers of aging services to question the preparedness of aging policies, programs and personnel to meet the demands of this growing population.

## **The Role of Social Work in Aging Services**

Increasing numbers of older adults have complex conditions marked by chronic physical or mental health problems; co-morbidities; and problematic personal, interpersonal, social, and economic situations. These complex conditions warrant comprehensive multi-dimensional assessments, as well as assistance accessing and paying for community resources – a combination of services typically described as case management. Evaluations regarding the effectiveness of case management suggest that older individuals receiving these services are less likely to require institutional care in addition to experiencing an improved quality of life along with their caregivers.<sup>13</sup>

<sup>1</sup> Council on Social Work Education. (2001). A blueprint for the new millennium. Washington, DC: CSWE.

<sup>2</sup> Scharlach, A., Damron-Rodriguez, J., Robinson, B., & Feldman, R. (2000). Educating social workers for an aging society: A vision for the 21st century. *Journal of Social Work Education*, 36(3), 521-538.

<sup>3</sup> Rosen, A., & Zlotnik, J. (2001). Social work's response to the growing older population. *Generations*, 25(1), 69-71.

<sup>4</sup> Dawson, S., & Surpin, R. (2001). Direct-care healthcare workers: You get what you pay for. *Generations*, 25(1), 23-28.

<sup>5</sup> Stone, R. (2001). Research on frontline workers in long-term care. *Generations*, 25(1), 49-57.

<sup>6</sup> Bonder, B., Martin, L., & Miracle, A. (2001). Achieving cultural competence: The challenge for clients and healthcare workers in a multicultural society. *Generations*, 25(1), 35-42.

<sup>7</sup> Blanchette, P., & Flynn, B. (2001). Geriatric medicine: An approaching crisis. *Generations*, 25(1), 80-84.

<sup>8</sup> U.S. Bureau of the Census. (2000). Census 2000 Summary File 1, Matrices P1, P3, P4, P8, P9, P12, P13, P17, P18, P19, P20, P23, P27, P28, P33, PCT5, PCT8, PCT11, PCT15, H1, H3, H4, H5, H11, and H12. Washington, DC: U.S. Government Printing Office.

<sup>9</sup> Administration on Aging. (2000). A profile of older Americans: 2000 [Online]. Available: <[www.aoa.gov/aoa/stats/profile/default.htm](http://www.aoa.gov/aoa/stats/profile/default.htm)>

<sup>10</sup> U.S. Bureau of the Census. (1996). Current population reports, Special studies, P23-190, 65+ in the United States. Washington, DC: U.S. Government Printing Office.

<sup>11</sup> Lee, R., & Villa, V. (2000). Population Aging in California. Berkeley, CA: California Policy Research Center.

<sup>12</sup> Lee, R., & Villa, V. (2000). Population Aging in California. Berkeley, CA: California Policy Research Center.

<sup>13</sup> Challis, D. (1993). Case management in social and health care: Lessons from a United Kingdom program. *Journal of Case Management*, 2(3), 79-90.

Good case management requires complex skills requiring substantial training and expertise. Social workers are particularly well suited to provide the case management and related services needed by disabled older adults since their education and training focus on the complex nature of human problems, including the interface among physical, mental and social aspects of individuals.<sup>14-15</sup> Social workers also are trained to assist clients and their families to navigate through the various fragmented, poorly coordinated, and complex health, mental health and social service systems.<sup>16-18</sup>

### **Impact of the Lack of Professionally Trained Personnel**

Lack of professionally trained social workers has a potentially negative impact on aging services. Research suggests that workers lacking professional training and skills may neglect essential aspects of assessment and case management, such as client self-determination and related ethical issues, possibly resulting in inadequate care plans that do not fully meet clients' needs.<sup>19</sup> In addition, workers with less professional training may not be adequately prepared to handle difficult ethical issues, or to help clients navigate complex funding and service delivery systems. Professionally trained social workers, on the other hand, are more likely than paraprofessionals to provide effective case management services for clients with complex problems.<sup>20-21</sup>

### **Aging Services Personnel in Public Social Services**

Despite the increasing need for social workers in aging services, there is a substantial shortage of social workers with professional training to work with older clients, and most social workers lack adequate gerontological knowledge and skills. It has been estimated that 60,000 to 70,000 social workers are needed to provide aging services,<sup>22</sup> whereas only about 5,000 of the 155,000 members of the National Association of Social Workers claim aging as their primary field of practice.<sup>23</sup> Moreover, only about 3% of social work students specialize in geriatric social work during their MSW training, and perhaps only another 2% take any classes at all in social work with older adults.<sup>24-25</sup> Furthermore, the curricula of most social work schools lack adequate aging content,<sup>26</sup> with the majority of social work programs offering fewer than two elective courses related to aging.<sup>27</sup>

A statewide survey of personnel in California's public aging services departments, conducted by the Center for the Advanced Study of Aging Services (CASAS) at the University of California, Berkeley, found substantial gaps in the professional education and training of the state's aging services personnel. In adult protective services, where advanced assessment and intervention skills are needed, only 42 percent of the workers had an MSW; 36 percent of other case managers had an MSW; 4 percent of In-home Support Services pro-

<sup>14</sup>Rosen, A., & Zlotnick, J. (2001). Social work's response to the growing older population. *Generations*, 25(1), 69-71.

<sup>15</sup>Vourlekis, B., & Greene, R. (Eds.). (1992). *Social work case management*. New York: Aldine De Gruyter.

<sup>16</sup>Nelson, G. (1995). The field of adult services. In G.M. Nelson, A.C. Eller, D.W. Streets, & M.L. Morse (Eds.), *The field of adult service: Social work practice and administration* (pp. 3-16). Washington, DC: NASW Press.

<sup>17</sup>Austin, C. (1990). Case management: Myths and realities. *Families in Society: The Journal of Contemporary Human Services*, 71(7), 398-407.

<sup>18</sup>Lens, V., & Pollack, D. (1999). Welfare reform: Back to the future! *Administration in Social Work*, 23(2), 61-77.

<sup>19</sup>Morrow-Howell, N. (1992). Clinical case management: The hallmark of gerontological social work. *Geriatric Social Work Education*, 18(3-4), 119-131.

<sup>20</sup>Challis, D. (1999). Assessment and care management: Developments since the community care reforms. In Royal Commission on Long Term Care (Eds.), *With respect to old age: Long term care rights and responsibilities* (pp. 69-86). England: Royal Commission on Long Term Care.

<sup>21</sup>National Chronic Care Consortium. (2000). *Case management: Methods and issues*. Bloomington, MN: National Chronic Care Consortium.

<sup>22</sup>National Institute on Aging. (1987). *Personnel for health needs of the elderly through the year 2020*. Bethesda, MD: Department of Health and Human Services, Public Health Service.

<sup>23</sup>Rosen, A., & Zlotnik, J. (2001). Social work's response to the growing older population. *Generations*, 25(1), 69-71.

<sup>24</sup>Scharlach, A., Damron-Rodriguez, J., Robinson, B., & Feldman, R. (2000). Educating social workers for an aging society: A vision for the 21st century. *Journal of Social Work Education*, 36(3), 521-538.

<sup>25</sup>Damron-Rodriguez, J., Villa, V., Tsent, H., & Lubben, J. (1997). Demographic and organizational influences on the development of Gerontological social work curriculum. *Gerontology & Geriatrics Education*, 17(3), 3-18.

<sup>26</sup>Scharlach, A., Damron-Rodriguez, J., Robinson, B., & Feldman, R. (2000). Educating social workers for an aging society: A vision for the 21st century. *Journal of Social Work Education*, 36(3), 521-538.

<sup>27</sup>Damron-Rodriguez, J., Villa, V., Tsent, H., & Lubben, J. (1997). Demographic and organizational influences on the development of Gerontological social work curriculum. *Gerontology & Geriatrics Education*, 17(3), 3-18.

professionals had an MSW; 6 percent of Information and Referral workers had an MSW; and 12 percent of workers in various other programs had an MSW.

The lack of master’s level experience and training among aging services workers was further demonstrated by the MSW requirements of vacant positions. An MSW was required for only 35 percent of current APS vacancies and only 50 percent of vacant case management positions. No MSW was required for any of the vacancies in IHSS, Information and Referral, or other programs. When asked to identify the greatest barriers to hiring aging services personnel, 72% of respondents cited the lack of qualified applicants with gerontology experience and/or training. Respondents also were asked for policy and program recommendations that would help to meet their agency’s current and future personnel needs in aging services. Many respondents suggested developing programs to recruit and train aging service workers, including increasing the emphasis on gerontology in university courses and programs. Also suggested were incentives and training programs for professional development of existing staff with and without MSW’s.

<b>PERCENT MSW PERSONNEL, BY PROGRAM</b>	
<b>PROGRAM</b>	<b>% CURRENT STAFF WITH MSW</b>
Adult Protective Services	42%
In-home Supportive Services (IHSS)	4%
Case Management	36%
Information and Referral	6%
Other	12%

### **Hartford Foundation Initiatives for Strengthening Social Work Training in Aging**

The shortage of professionally trained social workers with knowledge and skills in aging services has prompted a number of recent efforts to improve the recruitment and training of social work students to serve elderly populations. Foremost among these has been the Geriatric Social Work Initiative of the John A. Hartford Foundation of New York. In collaboration with social work education programs the Geriatric Social Work Initiative seeks to enhance the gerontology skills of current and future social workers through three main strategies: faculty development, curriculum enhancement, and gerontology-rich training experiences.

Hartford-sponsored faculty development initiatives include a Faculty Scholars Program, which provides mentorship and gerontological research training for promising new social work faculty, and a Doctoral Fellows Program, which offers doctoral dissertation grants, career guidance, professional development and networking opportunities. Hartford-sponsored curriculum enhancement initiatives include a Faculty Development Program, which offers one- and four-day institutes on developing and implementing gerontological curriculum in social work courses; a Geriatric Enrichment Program, which supports gerontological curriculum transformation in 70 BSW and MSW programs nationally; and the Council on Social Work Education (CSWE) Strengthening Aging and Gerontology Education for Social Work Project (SAGE-SW), which provides educational resources and technical assistance to schools of social work to improve gerontological social work education nationally. Finally, high-quality gerontology-rich training experiences are promoted through the Practicum Partnership Project (PPP), which fosters development of local consortia among academic programs and field training sites. The training model described in this manual reflects the experiences of one of the PPP consortia.

# Overview of the Training Curriculum

## Rationale

Public sector aging service systems comprise a unique array of programs and services for vulnerable older and disabled adults that are not available elsewhere in the community. Because these systems constitute a critical link in the social welfare system, it is essential that gerontological social workers understand the services provided by county departments of adult and aging services (DAAS). This is vital for social workers that choose to work within these departments, as well as for those who work in community-based agencies. Additionally, broad knowledge of the aging public sector service system will greatly enhance social workers' ability to assume leadership roles in the field. The need for developing future leaders in aging who can meet the challenges of our aging society is now widely recognized by state and county administrators, and social work training programs.

## Goals and Objectives of the Curriculum

The overall goal of this training curriculum is to increase the numbers of professional social workers able to provide effective service and leadership in county departments of adult and aging services.

The objectives of the training curriculum are:

- To provide social work students with a range of learning opportunities that will enable them to develop effective social work practice skills with older and disabled clients who are served by DAAS;
- To provide social work students with a comprehensive understanding of the full range of programs and services delivered by DAAS programs.

## Overview of Training Methods

The training model incorporates two training methods that are outlined briefly below, and discussed in detail in the next section of the manual:

- (1) Students learn social work practice skills working under the supervision of a Field Instructor in a "Primary Program Area";

Students are assigned to one county department of adult and aging services for the entire academic year where they develop specific social work practice skills. Within the department, they are assigned to a Field Instructor in a Primary Program Area (PPA), such as adult protective services or the public guardian. During the first several weeks of their internship, students receive an in-depth orientation to their PPA in preparation for undertaking learning assignments that are developed in conjunction with their Field Instructor. Later in the internship, students undertake casework assignments or projects in their PPA. The particular learning assignments will vary depending upon students' specialization within their school.

- (2) Students complete structured rotations through all other DAAS programs.

In addition to developing practice skills in a particular PPA, students also complete structured rotations through all DAAS program areas during the first half of the internship experience. The purpose of these rotations is to expose students to the full range of DAAS programs and services before they assume primary responsibility for a caseload or a project.

# Components of the Training Program

## A. Primary Program Area

### Selection of Primary Program Areas

The selection of specific Primary Program Areas depends on two criteria: (1) availability of qualified Field Instructors; (2) availability of appropriate learning opportunities.

The overarching criterion for selecting Primary Program Areas is their capacity to provide students with appropriate learning activities. This means that programs should be able to offer a range of assignments that enable students to develop professional practice skills and knowledge. In general, these skills include the ability to differentially assess the needs of individuals, groups and communities, and to develop appropriate interventions to address those needs. An additional goal of this training curriculum is providing students with a broad exposure to a range of diverse elderly clients.

Each school has a written list of specific social work practice skills that it expects its students to acquire. Training Coordinators should work closely with the school's field faculty to identify programs that meet these expectations. Once potential programs are identified, Training Coordinators should consult with the managers of these programs to discuss how student training can be developed within each program.

### Orientation to Primary Program Areas

Students begin in a Primary Program Area (PPA) for the first three to four weeks of their internship. This provides them with a "homebase" within DAAS, and gives them with a context for learning about other DAAS programs that will be introduced later through structured rotations. These first weeks in their PPA also provide an opportunity

to begin establishing relationships with their Field Instructor and other program staff.

During these initial weeks, students complete at least the following activities. These activities are typically planned and implemented jointly by the Training Coordinator and Field Instructors:

#### ORIENTATION ACTIVITIES

- Receive an overview of the Department as a whole
- Receive a basic orientation to the Primary Program Area including:
  - Program goals/objectives
  - Organizational structure
  - Staffing
  - Clientele & eligibility criteria for services
  - Management information systems
  - Record keeping and documentation requirements
  - Program budget and funding sources
- Meet PPA staff
- Accompany PPA staff on home visit(s)
- Observe at least one client intake and assessment
- Review policy and procedures manuals
- Attend relevant staff meetings
- Schedule/conduct interviews with key PPA staff
- Schedule site visits to agencies related to PPA
- Draft the Learning Contract with Field Instructor

### Student Assignments in Primary Program Areas

Students learn specific social work practice skills in their assigned PPA by assuming responsibility for a small client caseload and/or project under the direction of a Field Instructor. Specific assignments will generally depend upon the particular methods of practice they have selected. "Direct service stu-

dents” focus on working directly with clients and their families, and typically assume responsibility for a small client caseload. “Indirect service students,” on the other hand, focus primarily on management and administration, and typically are assigned projects that involve program development, evaluation, and/or policy analysis.

It is likely that most students accepted for internship will be direct service students. Consequently, the materials developed for this curriculum focus on how casework assignments are organized. In the following sections, we provide guidelines regarding:

- the types of clients to be assigned
- how to determine student caseloads
- factors to consider when determining caseload assignments
- the sequencing of learning activities
- casework assignments in APS and MSSP/Linkages.

#### **Types of clients students should be assigned:**

Both first and second year students should be primarily assigned clients representing a diversity of cultural, racial, and ethnic backgrounds. The case mix should also include clients with a range of social supports and needs, as well as a range of cognitive, medical, psychosocial, and physical issues.

#### **A reasonable client caseload for a student to carry:**

The number of clients should be determined primarily by the Field Instructor, with input from the school’s field faculty liaison. In general, second year students are expected to carry more clients than first year students because they are in the field more days and are presumed to have a greater level of knowledge and skill.

#### **FACTORS TO BE CONSIDERED WHEN DETERMINING CASELOAD ASSIGNMENTS**

- Is the student’s level of knowledge and skill appropriate for the assignment?
- How complex is the student’s current caseload?
- What other field activities or assignments is the student involved in besides casework? (E.g. staff meetings, trainings)
- How much traveling time is involved in home visiting? How familiar is the student with the agency’s catchment area? How much additional time does the student need for travel if s/he uses public transportation?
- Is the student adequately prepared, ready and willing to take on additional assignments?

#### **FACTORS TO BE CONSIDERED WHEN SEQUENCING OF LEARNING ACTIVITIES**

**Step One:** Students are provided with several opportunities to observe other staff performing a variety of tasks, and are “debriefed” afterwards by the Field Instructor and/or staff involved. These tasks include client intake, re/assessment, family conferences, care plan development, group treatment, and case presentations.

**Step Two:** Students are provided with several opportunities to co-perform these tasks with staff, and are “debriefed” afterwards by the Field Instructor and/or staff involved. Examples include co-conducting intakes and assessments, co-facilitating a family or group treatment meeting, and assisting with follow-up casework activities such as locating resources to implement a client’s care plan, as well as practice charting and developing care plans.

**Step Three:** Students are provided with opportunities to perform these tasks independently, with continuing supervision by the Field Instructor.

## **Guidelines for Case Assignments**

Following are guidelines for making assignments in adult protective services and MSSP/Linkages, since these PPAs are the most likely to host students. These guidelines are based on extensive student feedback regarding effective approaches to introducing and organizing casework assignments. Field Instructors can use this material in structuring learning assignments, such as developing role plays and preparing supplemental reading for students.

### **GUIDELINES FOR CASEWORK ASSIGNMENTS**

#### **Casework Assignments in Adult Protective Services:**

Students should receive *independent assignments of at least one case of each of the following types:*

- Self-neglect case
- Physical abuse case
- Financial abuse case
- Neglect case
- Care management case

#### **Casework Assignments in MSSP/Linkages:**

Students should receive *independent assignments of at least one case of each of the following types:*

- Case involving physical impairment
- Case involving cognitive impairment
- Case involving complex medical conditions
- Case involving nursing home placement or other discharge situation

These independent assignments should be made only after students have received a comprehensive orientation to program and role requirements and have shadowed at least one worker on a similar case. Students also should receive comprehensive preparatory information about each case:

#### **Preparatory Information**

- Theoretical information about each type of case
- Indicators of each type of case
- Policies and procedures relevant to each type of case, including required paperwork
- Medical & psychosocial background information about each type of case, including medical terminology and pharmacology
- Assessment techniques and questions relevant to each type of case
- Appropriate goals and interventions for each type of case
- Factors which indicate the need for case management
- Types of resources available and most commonly used for each type of case
- Cultural factors/considerations relevant to each type of case

## *B. Program Rotations*

After students complete their orientation to the basic organizational and practice components of their Primary Program Area, they begin a series of structured rotations through the other program areas of the department. These rotations are scheduled intermittently throughout the first semester, alternating with students' return to their Primary Program Areas for two or three weeks before the next rotation.

This intermittent scheduling of program rotations throughout the first semester is more effective for student learning than concentrating them all in the beginning of the internship. This conclusion is based on extensive student feedback over the course of the Hartford grant. The original curriculum clustered all of the rotations at the beginning of the first semester, based on the assumption that students would need to be familiar with all DAAS programs before they began assignments in their PPAs. However, students reported that completing all rotations in the first several weeks was too much information delivered too soon. Most importantly, students reported that they lacked a frame of reference for understanding the information. The concentrated rotation schedule also prevented them from forming relationships with their Field Instructors until late in the first semester.

Each program rotation consists of a basic introduction to the program. Instructional methods should be balanced between didactic/information-giving and hands-on activities that directly expose students to the clientele and practical operations of the program area. In general, an overview of the program is first provided by the program director, and includes program goals/objectives, organizational structure, funding sources and budget, staffing, clientele served, and program eligibility criteria and procedures. This information-giving is then followed by a variety of activities such as accompanying staff on home visits to observe intake, assessment and/or reassessment processes; making site visits to other agencies closely related

### **PROGRAM ROTATION ACTIVITIES**

Receive basic introduction to program including:

- Program goals/objectives
- Organizational structure
- Funding sources and budget
- Staffing
- Clientele served
- Eligibility criteria and procedures

Accompany staff on home visits

Make agency visits

Review client charts/files

Attend program staff meetings

to the program area; reviewing client charts/files; and attending program staff meetings.

The length of each rotation may vary depending on the complexity of the program area, the number of activities scheduled, and the availability of program staff to host students. For example, the In-Home Supportive Services rotation may be scheduled over a period of one or two days depending on how many home visits are scheduled in addition to didactic presentations. In contrast, the public guardian rotation may take three or four days due to the comparative complexity of the program. A rule of thumb for planning the overall length of a rotation is how long it will take to introduce students to the basic components of the program.

### **Suggested Content of Program Rotations**

Below are suggested outlines for structuring program rotations in DAAS programs, including Area Agency on Aging, In-Home Supportive Services, Adult Protective Services, Public Guardian/Conservator, and Multipurpose Senior Service Program.

### **AREA AGENCY ON AGING (AAA)**

- Receive basic introduction to program including:
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
  - Community needs-assessment process and area plan
- Review AAA four-year plan
- Visit several contract/vendor programs
- Accompany staff on program monitoring visit(s)
- Observe senior Information and Assistance referral process
- Attend public hearing and/or Commission on Aging meeting
- Attend Board of Supervisors meeting if AAA is in county system
- Attend program staff meeting

### **ADULT PROTECTIVE SERVICES (APS)**

- Receive basic introduction to program including:
  - APS authorizing legislation, particularly reporting requirements and abuse definitions
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Review several client files
- Accompany staff on home visit(s) to observe intake and assessment process
- Make site visits to agencies closely related to program (e.g. Ombudsman office, Elder Abuse Prevention program, District Attorney's office, etc).
- Attend Multidisciplinary Team (MDT) meeting
- Attend program staff meeting

### **IN-HOME SUPPORTIVE SERVICES (IHSS)**

- Receive basic introduction to program including:
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Review a client chart to become familiar with records required
- Accompany staff on home visit(s) to observe intake and assessment process
- Make site visit to an agency closely related to program (e.g. Choreworker Registry)
- Review several client charts/files
- Attend program staff meeting
- Attend Public Authority meeting

### **PUBLIC GUARDIAN/CONSERVATOR PROGRAM (PG)**

- Receive basic introduction to program including:
  - Relevant state statutes re: probate and LPS conservatorship
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Accompany staff on home visit(s) to observe intake and assessment process
- Make site visits to agencies closely related to program (e.g. court investigator office, private conservatorship program)
- Review several client files
- Attend conservatorship court hearing
- Attend LPS hearing
- Attend program staff meeting

### **MULTI-PURPOSE SENIOR SERVICE PROGRAM (MSSP)**

- Receive basic introduction to program including:
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Accompany staff on home visit(s) to observe intake, assessment and/or reassessment process
- Make site visit to agencies closely related to program (e.g. adult day health care center, nursing home, Board & Care)
- Review several client charts/files
- Attend program staff meeting if possible

### **Implementing the Program Rotations**

The program rotations are perhaps the most complicated aspect of the training curriculum, especially if students come from different schools with different field schedules. With this in mind, we offer the following suggestions:

#### **Some tips regarding program rotations:**

- For each program rotation, a lead staff person should be identified who will oversee students' activities during the rotation period. Training Coordinators should confirm the rotation schedule with the lead person in each program area shortly before students are scheduled in order to confirm plans.
- Students should receive a written schedule of activities with contact persons and locations of meetings, etc. This might be in the form of a checklist which students initial or check off as they complete the activities. All program staff that will be involved with the students during the rotation should also receive a copy of the schedule. A sample rotation schedule is included in Appendix A.
- At the beginning of each program rotation, students should be given a basic introduction to the

program area, followed by various activities that illustrate the introductory information.

- Program rotations should include opportunities for students to accompany staff on home visits whenever possible. This recommendation is based on extensive student feedback that identified home visits as one of their most important learning activities.
- Students often need assistance arranging to accompany staff, especially in the early weeks of their internships when they are unfamiliar with staff, and/or unsure how to make these arrangements themselves. Consequently, Training Coordinators or other staff should directly link students to cooperative staff who will take them out on home visits.
- Students should prepare for home visits beforehand by reviewing client files and discussing the purpose of the visit. If possible, students should be debriefed after visits regarding their observations, questions, and reactions.
- At the end of each rotation period, students should have an opportunity to debrief with the Training Coordinator and/or program staff. These debriefings are particularly useful in helping students process their experiences, and also in providing information for improving future rotations.

# Training Coordinator and Field Instructor Responsibilities

## A. Training Coordinators

Training Coordinators are agency staff who are responsible for coordinating and overseeing all aspects of student training. This typically includes identifying specific program areas for internships, recruiting Field Instructors, serving as liaison to schools, and planning student orientation activities. This coordinating position is crucial when there are multiple student interns, and/or several programs involved in the training.

Because a central feature of this training program is the use of rotations through all DAAS program areas, the appointment of a Training Coordinator is essential to its success. Implementing rotations requires considerable time and effort in planning and coordinating across program areas, as well as the authority within the agency to collaborate with managers of these programs. These activities are typically not possible for individual Field Instructors in a specific program area, who generally lack needed authority or access to other program managers.

Most DAAS have not previously had Training Coordinators due to their current lack of emphasis on student training. Therefore, it is essential for social work programs to take an active role in advocating for these appointments with DAAS directors. Reallocating staff time to a new function may be a challenging task for DAAS directors, particularly in times of scarce resources.

Typically, Training Coordinators have other job duties, and devote only a portion of their time to student training. Estimates of the time required to perform training coordination activities are given below, although actual time may vary from agency to agency:

### TRAINING COORDINATION ACTIVITIES

- (1) Identifying potential internships within the agency, including collaborating with program supervisors, recruiting qualified field instructors, and drafting internship descriptions (8 hours)
- (2) Conferring with Schools related to student placement process, including providing updated information about available internships, arranging for and/or conducting student interviews, providing feedback to schools about student selections (3 hours per student)
- (3) Planning student orientation activities, including coordinating with other programs within the agency and with other programs outside the agency (15-20 hours)  
**NOTE:** If orientation activities include structured rotations through other program areas, add an additional 5 hours per program rotation; if only updating already established program rotation schedules, add 2 hours per program rotation.
- (4) Coordinating with appropriate departments to insure students' compliance with required agency paperwork and regulations, such as criminal clearances/fingerprinting, medical examinations, immunizations, personnel paperwork, etc. (1-2 hours per student)
- (5) Arranging office space, telephone and other equipment, supplies, computer access, etc. (1-2 hours per student)
- (6) Monitoring the overall training experiences of students and field instructors, and providing routine support and/or problemsolving as needed (1-2 hours per month for each student/field instructor dyad)  
**NOTE:** If student has special needs or encounters unusual problems, add additional time.
- (7) Orienting new field instructors and their supervisors (4 hours per Field Instructor)
- (8) Attending professional development seminars and/or meetings related to student training (4-8 hours)

Several factors are important for ensuring the success of the Training Coordinator's efforts. In selecting Training Coordinators, their positions within DAAS are an important consideration. In general, those Training Coordinators who are senior managers or supervisors are best able to cross program lines in order to garner the necessary cooperation for planning and implementing rotations. Other selection considerations include the overall quality of their working relationships with other programs, and the comprehensiveness of their knowledge about the department and staff. It also is vital that Training Coordinators have strong and visible support from DAAS directors in order to carry out these activities, particularly for the first year or two as the Department institutionalizes student training.

Schools should be prepared to provide training, technical assistance and support to the new Training Coordinators as they develop this important function. This may include special training, and provision of resource materials such as books and videos. Schools can also convene periodic meetings with other Training Coordinators so that they have a forum for supporting each other, and for sharing ideas.

### *B. Field Instructors*

#### **Field Instructor Responsibilities**

All professional social work fieldwork programs use the model of matching each student to a Field Instructor who is responsible for guiding, mentoring, supporting and evaluating the student throughout the internship. Field Instructors form the heart of any training program.

Traditionally, Field Instructors have primary responsibility for planning, coordinating, and evaluating student learning activities for the entire

year. These are always challenging roles, requiring an understanding of adult learning styles, as well as the appropriate selection, pacing and sequencing of assignments for each student's skill level and readiness. This training model brings new challenges due to the scheduling of program rotations that interrupt the traditional flow of student/Field Instructor interactions and work on assignments.

A particular planning challenge is identifying the kind of case or project assignment that can be given to students who will be gone for one, two or three days every few weeks while completing rotations. Due to this rotation feature, direct service students generally co-work cases with other staff longer than they may do in more traditional models, and independent casework may be delayed until the second half of the internship experience. In addition, students are generally not assigned crisis cases or other time-intensive work since they may not be available to respond as needed and/or comply with deadlines for required paperwork. The impact of rotation scheduling is perhaps less problematic for indirect service students who may be better able to coordinate project assignments around rotations.

#### **Recruiting Field Instructors**

Identification and selection of Field Instructors within the Primary Program Areas is a critical component in implementing the training program. The criteria for selecting Field Instructors are established by the Council on Social Work Education, which accredits schools of social work. For MSW training, the basic criteria include having a master's degree in social work, having been out of graduate school for at least two years, and having been on staff for a sufficient length of time to thoroughly understand their work. Schools may add additional requirements. The following is a complete list of selection criteria developed by CSWTA:

## GUIDELINES FOR SELECTING FIELD INSTRUCTORS

- a Master's degree from an accredited school of social work\*
- a minimum of two years postgraduate work experience in the area in which s/he is supervising
- has been on staff for a sufficient period of time to have acquired a thorough understanding of their job, and the operations of the program
- is available to provide weekly field instruction meetings with the student (generally 60 minutes)
- an ongoing commitment to professional social work education
- knowledge of the agency, its policies, procedures and its relation to the community
- willingness to participate in training and other field events, and to work with the School's field faculty liaison throughout the field education process
- an understanding of adult learning styles
- the ability to provide structured learning experiences
- experience and knowledge of the aging process

**\*NOTE:** Agency staff who do not have an MSW but who have other relevant Master's degrees and meet all other criteria above may be granted exceptional permission by the School to serve as Field Instructors for indirect service students only.)

Training Coordinators typically have the primary responsibility for identifying and recruiting Field Instructors. In this process, Training Coordinators generally work collaboratively with program supervisors who can assess which staff have the required qualifications, temperament, and experience to work with students. In addition to identifying potential Field Instructors, supervisors are often in the best position to personally recruit them, and have the authority to adjust their work schedules if needed. Alternately, Training Coordinators may do the formal recruitment with permission from managers.

To facilitate recruitment of Field Instructors, CSWTA has developed detailed guidelines about the role and activities of Field Instructors, includ-

ing time projections for each activity. These guidelines are very useful in recruiting and orienting new Field Instructors, who often overestimate or underestimate the amount of time and effort required. They are also useful in giving supervisors a realistic understanding of the scope of the work expected of Field Instructors. This is crucial because Field Instructors typically carry their own client caseloads, and must have adequate release time to work with students. Consequently, it is essential that Training Coordinators and school field faculty address these caseload issues directly with DAAS directors, program administrators and supervisors early in the recruitment process, because union contracts in some counties specify that work assignments cannot be altered without formal union negotiations.

## ESTIMATE OF FIELD INSTRUCTOR'S TIME

**NOTE** The following time estimates include basic field instruction activities for one student for 30 weeks. Additional time may be required if the student has special instructional needs or if the Field Instructor assists 2nd year students with their required research project. Time estimates are broken down in two ways: by type of activity, and semester by semester. Together, all of these activities total approximately 106 hours for the entire school year.

### **Estimated Time by Type of Activity:**

#### Administrative activities: (31 hours)

- Attending field instructor training: 8 hours
- Pre-planning for student's arrival: 4 hours
- Preparing/coordinating orientation activities: 6 hours
- Developing the learning contract: 4 hours
- Conducting mid-term and end-of-term student evaluations: 6 hours
- Coordinating/attending site visits by school liaison: 3 hours

#### Supervision activities: (75 hours)

- Scheduled weekly instruction/supervision sessions (60 minutes/week): 30 hours
- Unscheduled instruction/supervision (60 minutes/week): 30 hours
- Reviewing student's documentation: 15 hours

### **Estimated Time by Semester:**

#### Fall semester: (60 hours)

- Attending field instructor training: 4 hours
- Pre-planning for student's arrival: 4 hours
- Preparing/coordinating orientation activities: 6 hours
- Developing the learning contract: 4 hours
- Conducting mid-term student evaluation: 3 hours
- Coordinating/attending site visits by school liaison: 1.5 hours
- Scheduled weekly instruction/supervision session (60 minutes/week): 15 hours
- Unscheduled instruction supervision (60 minutes/week): 15 hours
- Reviewing student's documentation: 7.5 hours

#### Spring semester: (46 hours)

- Attending field instructor training: 4 hours
- Conducting end-of-term student evaluation: 3 hours
- Coordinating/attending site visits by school liaison: 1.5 hours
- Scheduled weekly instruction/supervision sessions (60 minutes/week): 15 hours
- Unscheduled instruction supervision (60 minutes/week): 15 hours
- Reviewing student's documentation: 7.5 hours

Other strategies that are effective in both recruiting and retaining Field Instructors include special recognition and training. Schools can issue certificates of appreciation to Field Instructors, and send annual letters of commendation to their supervisors, DAAS directors, and the HR office for their personnel files. The schools can also provide special recognition at school functions and in

newsletters, and also encourage DAAS to recognize their work in similar ways within the agency. Schools can also provide Field Instructors with special orientation and training, as well as invite them to student seminars and other school lectures and events, for which they might receive continuing education credits. The following is a sample letter of commendation:

### SAMPLE FIELD INSTRUCTOR COMMENDATION LETTER

\_\_\_\_\_, Executive Director  
County of \_\_\_\_\_, Department of Adult & Aging Services  
25 Main Street, Suite 650  
San Francisco, CA 94102

Dear \_\_\_\_\_,

On behalf of the School of Social Welfare, we would like to commend \_\_\_\_\_ for her invaluable participation during the past year as a Field Instructor. \_\_\_\_\_'s contributions included interviewing and selecting potential students, mentoring the students and facilitating their learning experiences. Specifically, this involved developing and overseeing a learning contract with the student; providing the student and student's school with mid-term and final evaluations; providing regular weekly instruction, supervision, and consultation to her student regarding assigned casework, as well as ongoing support and encouragement.

Field Instructors are the backbone of MSW training programs, and it is only because of \_\_\_\_\_'s commitment to professional training and willingness to add this extra activity to her job duties that we have been able to implement this training program. Her excellent mentorship has given her student an invaluable gift of experience and expertise that will significantly enhance our community's ability serve its older adults. With your continued encouragement and support of her role as a field instructor, we hope that others will follow her example in shaping the next generation of gerontological social workers.

Sincerely,

cc: to Field Instructor  
to Field Instructor's supervisor

## Availability of Qualified Field Instructors

The availability of qualified Field Instructors varies widely in DAAS, and is the most significant challenge in implementing the training model. These variations stem partly from divergent civil service staffing requirements across counties. Job classifications and educational requirements vary widely for the same type of job. Consequently, some DAAS have more professional social workers and a greater capacity for training MSW students than others. For example, not all adult protective service programs require their staff to have MSW degrees, and therefore lack the capacity to train MSW students.

If program areas lack qualified Field Instructors, alternative approaches might be implemented. These include the recruitment of MSWs from other programs within DAAS or from affiliated agencies that agree to serve as Field Instructors. This approach requires that they work closely with the program supervisor or other program staff to ensure that students receive adequate supervision for task assignments. Another alternative is having field faculty from affiliated social work programs provide the required student supervision. This is typically an interim arrangement until MSW Field Instructors are available in the agency.

## Training for Field Instructors

Field Instructors need training and support from schools of social work. This is particularly important for helping new Field Instructors understand their instructional roles, and how to effectively work with students. Schools also provide faculty liaisons who work with Field Instructors and students, and provide general oversight of the internship. Their specific responsibilities vary somewhat from school to school, and may include approving learning contracts, reviewing student performance evaluations, making visits to the agencies, and providing consul-

tation and problem solving to Field Instructors and students. New Field Instructors often require special guidance and support from faculty liaisons as they learn their new training roles. The following is a sample training curriculum for Field Instructors:

### SAMPLE TRAINING OUTLINE FOR FIELD INSTRUCTORS

#### Theories of Adult Learning and Experiential Learning

#### Role of the Field Instructor

- creating and maintaining an effective learning environment
- student orientation
- planning the learning contract
- evaluating student performance
- teaching theory, practice and cultural competence
- mentoring and modeling

#### Teaching Tools for Field Instruction

- individual and group supervision
- indirect methods of instruction (e.g. use of process recording, audio and video recording)
- direct methods of instruction (e.g. sitting-in, co-working; role playing)

#### Introduction to Student Competencies in Aging

- Implications for student assignments
- Implications for student performance evaluations

#### Guidelines for Developing Student Assignments

# *Student Recruitment and Curricular Support*

## **Recruiting, Interviewing and Selecting MSW Students**

Schools of social work use a variety of methods for matching students with internship opportunities. Schools typically develop a list of approved internships, in order to inform students about available options. After reviewing the information, students and/or their faculty field liaison select one or more internships that match the student's individual interests and educational goals of each student. Students then interview at selected agencies. After the interviews, agencies inform students and/or the schools if they are acceptable, and students also give feedback to the agency and their school about which internship they prefer.

Central to the recruitment process is how schools disseminate information about the prospective internships. Effective methods include electronic web pages, individual meetings with field faculty to discuss potential internships, and internship "fairs" where agency staff discuss specific internships with students. Of these methods, personal contact with prospective students is particularly effective through internship fairs and/or meetings with agency representatives who explain the training opportunities and personally encourage students to apply. In this regard, it is highly recommended that students have opportunities to meet DAAS staff and learn about their work, particularly because students often have inaccurate information about public aging services. This can also be accomplished by inviting DAAS staff to speak to classes and field seminars, and arranging site visits to DAAS.

The type of information about internship options that is made available to prospective students is another important consideration. Typically, students review a vast amount of written information

about many agencies in order to make internship selections. Consequently, detailed, interesting, and compelling internship descriptions tend to get noticed and selected.

Other information that should also be included is the clientele served, special requirements, and additional training support provided such as stipends, seminars, etc. Additional information can also be provided to prospective students by students who either are currently in DAAS internships or have already completed them. This allows prospective students to obtain firsthand information from their peers. Additionally, written student evaluations about their experiences in DAAS settings should also be made available to prospective students.

Students who completed the CSWTA training consistently commented that they were initially attracted to the training model because it appeared to be comprehensive and well organized. An important component of this was the use of a standard DAAS internship application form is another consideration in recruiting students.

Students often report that internship applications send a message that the agency is organized and takes the process of student recruitment and selection seriously. At a minimum, the application should include questions about the student's professional goals, prior experience with older adults, and expectations about the internship. This information can be used by DAAS staff to screen applicants for a minimum level of skill and knowledge before selecting applicants for in-person interviews. These questions also give students an idea of what to expect at the interviews, and help them to prepare. Applications also provide the opportunity to include additional detailed information about DAAS placements, including descriptions of all the

**SAMPLE DESCRIPTION OF STUDENT INTERNSHIP**

Name of Department \_\_\_\_\_

Name of Primary Program Area for Student Assignment (e.g. MSSP, AAA, APS)

Mailing Address of Program \_\_\_\_\_

Contact person for Program:

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail \_\_\_\_\_

Address: \_\_\_\_\_

(1) List the MSW Field Instructor(s) for this placement. (NOTE: Please attach current resume for each Field Instructor listed.)

(2) Indicate the number of student internships available in this program area by student year and method of practice:

\_\_\_\_\_ **Number of internships available for Direct Service Students**

\_\_\_\_\_ 1st year students \_\_\_\_\_ 2nd year students

\_\_\_\_\_ **Number of internships available for Indirect Service Students**

\_\_\_\_\_ 1st year students \_\_\_\_\_ 2nd year students

**(3) Indicate any special requirements for these internships:**

\_\_\_ medical exam Do you provide the exam? \_\_\_ YES \_\_\_ NO

\_\_\_ TB screen Do you provide the test? \_\_\_ YES \_\_\_ NO

\_\_\_ criminal records check: Do you provide this? \_\_\_ YES \_\_\_ NO

\_\_\_ valid driver's license

\_\_\_ access to own car for home visits

\_\_\_ language ability: List language(s) required \_\_\_\_\_

\_\_\_ required meetings/trainings: List days/times \_\_\_\_\_

\_\_\_ other requirements: \_\_\_\_\_

(4) Describe the clientele served by this program:

(5) List the learning activities in which the student would participate, including staff/agency meetings, trainings/dates, etc:

(6) List other information about this internship that students might find interesting and/or helpful in selecting this placement:

Person completing this form: \_\_\_\_\_

Telephone number: \_\_\_\_\_ E-mail \_\_\_\_\_ Date: \_\_\_\_\_

programs to which the students will be exposed. If there is more than one DAAS that provides internships in a region, a standard application might be

developed that also includes information about all of the available DAAS internships. The following is a sample internship application:

**SAMPLE STUDENT INTERNSHIP APPLICATION FOR DEPARTMENTS OF ADULT & AGING SERVICES**

DEADLINE TO SUBMIT APPLICATION TO FIELD OFFICE: [Date]

Student Name \_\_\_\_\_ Date \_\_\_\_\_

Student's Mailing address \_\_\_\_\_

Student's Phone number \_\_\_\_\_ E-mail \_\_\_\_\_

I am enrolled at: \_\_\_\_\_ [School]

in the following practice area or method \_\_\_\_\_

Indicate to which county/counties you are applying, and in which programs within each county you are most interested:

County: \_\_\_\_\_

APS PG AAA Linkages MSSP

Instructions:  
Please attach your resume to this form, and respond to the following questions (1-2 paragraphs for each section; all sections not to exceed 3 pages). **Submit three copies of this application and your resume to your Field Director by [date].** You will be notified the following week if you have been selected to interview at the agency. All approved interviews must be completed by [date]. Placements assignments will be confirmed by the week of [date].

**PROFESSIONAL GOALS:**  
What are your professional goals?

**STATEMENT OF INTENT:**  
What do you expect to learn by working in a department of adult and aging services?  
Be as specific as you can about your learning goals and objectives.

**EXPERIENCE WITH OLDER ADULTS:**  
What prior experience do you have working with older adults and their families?  
(Include all relevant personal, volunteer, and/or work experience)

**PRIOR TRAINING OR COURSE WORK IN AGING**  
What training and/or course work in aging have you completed? (Specify date, length, where taken, and brief description of the training and/or course work.)

**LEARNING/SUPERVISION:**  
What are your expectations regarding field supervision?  
Describe how you learn best, and how your field supervisor can facilitate this process.

NOTE: This information will be used by internship site in its student selection process.

The agency interview itself is another important factor in recruiting students. Students' impressions about staff, and the availability of potential learning opportunities gained through the interview, are critical in their selection of internships. Poor interview experiences typically result in students going to other agencies. Indeed, data analysis of the interview process for applicants to CSWTA internships revealed that almost 15% of all applicants ultimately selected other non-DAAS internships after their interview due to poor interview experiences.

An example of poor interviewing technique is the interviewer's use of "employee" instead of "student," which gives students the impression that they may just be substituting for employees rather than being regarded as learners. Another problem commonly identified by students is a non-directive interviewing style where students are not asked questions. This gives the impression that interviewers are not prepared and/or not interested in the student. In order to maximize recruitment of applicants, schools need to help interviewers utilize appropriate interviewing techniques. In addition, agency interviewers need to prepare interview questions and an interview format that makes students feel welcome and wanted.

### **SAMPLE QUESTIONS FOR STUDENT INTERVIEWS**

- 1) What drew you to social work?
- 2) What were you doing before coming to school?
- 3) What is your experience working with clients?
- 4) What is your experience working in a social service agency?
- 5) What are your short/long term career goals?
- 6) Why are you interested in this placement?
- 7) What are your learning goals, i.e. what skills and knowledge do you want to acquire at this internship?
- 8) What do you expect to learn at this internship?
- 9) What are your expectations of field supervision?
- 10) What is your learning style/how do you learn best?

# *Curricular Support to Students*

Curricular support should be provided to students in DAAS internships to enhance their ability to work effectively with elderly clients and their families. Schools have the primary responsibility for providing aging content in all courses, and for offering courses that focus on this population. Indeed, recent California legislation requires that all college-level health and human services programs offer content in aging (AB 2202).

If schools do not offer aging courses or seminars, students can be referred to other departments on campus or community education offerings that provide instruction in these areas. Other approaches include web-based materials, and library resources such as journals, books, and videos on aging that students can borrow. Students should also be encouraged to attend special seminars and workshops that are offered in the community. Schools can facilitate this by serving as a clearinghouse of information. Agencies can also provide tuition for interns to attend these events when possible.

Development of curricular materials is greatly enhanced when Training Coordinators and Field Instructors are included in the process. They provide current perspectives on specific areas to be

addressed, as well as how these areas are related to public sector service delivery. Additionally, they can also be invited to serve on field advisory committees and as classroom speakers. In so doing, social work educational curricula can be helped to reflect the latest developments and current issues in social work practice in aging services.

The following topic areas were found to be particularly effective in supporting students' work in DAAS:

- An Overview of the Aging Services Network
- The Aging Process
- Health and Illness in Later Life
- Cognitive Changes in Later life
- Competency Determination & Informed Consent
- Mental Illness in the Elderly
- Cultural Competence in Work with Older Adults
- Careers in Aging

Sample outlines for seminars based on each of these topics are presented on the following pages:

**SEMINAR OUTLINE:**  
**AN OVERVIEW OF THE AGING SERVICES NETWORK**

**FEDERAL PROGRAMS FOR OLDER ADULTS**

- I. Department of Health Services**
  - A. Administration on Aging
  - B. Health Care Financing Administration
    - Medicare
    - Medi-Cal
- II. Social Security Administration**
  - A. Social Security
  - B. Disability Insurance
  - C. Supplemental Social Insurance
- III. Department of Housing and Urban Development**
  - A. Public Housing Authorities
  - B. Section 8 Housing programs
- IV. Department of Veterans Affairs**
  - A. In-Patient Services
  - B. Out-Patient Services
  - C. Social Services

**CALIFORNIA LONG TERM CARE PROGRAMS**

- I. Department of Health Services**
  - A. Office of Long Term Care
  - B. On Lok/Programs for All Inclusive Care for the Elderly
  - C. Social Health Maintenance Organizations
  - D. Medi-Cal Division
  - E. Licensing & Certification Division
- II. Department of Social Services**
  - A. Adult Protective Services
  - B. In-Home Supportive Services
  - C. Supplemental Security Income/State Supplemental Payment Program
- III. Department of Mental Health**
  - A. Caregiver Resource Centers
  - B. Community Mental Health Services
- IV. Department of Aging**
  - A. Office of Long Term Care Ombudsman
  - B. Long Term Care Services
  - C. Community Services
  - D. Medi-Cal Services

**SEMINAR OUTLINE:**  
**THE AGING PROCESS**

**I. Theories about the Aging Process**

**II. The Physiology of Aging**

- Cardiovascular
- Respiratory
- Skeletal
- Musculature
- Organ Systems

**III. Sensory Changes**

- Hearing
- Vision
- Taste/Smell
- Touch/Tactile

**IV. Psychological & Cognitive Changes**

- Memory
- Learning
- Reasoning & Judgment
- Psychological Wellbeing

**V. Social Changes**

- Retirement
- Social Networks

**SEMINAR OUTLINE:**  
**HEALTH AND ILLNESS IN LATER LIFE**

**I. Chronic Illness vs Acute Illness**

- A. Definitions
- B. Difference in Treatment Approaches
  - Care vs. Cure
  - Patient/Doctor Collaboration
  - Patient Education
  - Family Involvement

**II. Functional Status**

- A. Definitions
  - Activities of Daily Living
  - Instrumental Activities of Daily Living
- B. Tools for Measuring Functional Status

**III. Common Medical Conditions in Later Life**

- Cardiovascular
- Respiratory
- Skeletal
- Muscular
- Organ Systems

**IV. Medications in Later Life**

- Common Prescription Medications
- Over-the-counter Drugs
- Drug Interactions
- Medication Management Tips

**V. Staying Well in Later Life**

- Diet
- Exercise
- Alcohol Use
- Social Involvement
- Spirituality

**SEMINAR OUTLINE:**  
**COGNITIVE CHANGES IN LATER LIFE**

**I. Normal Cognitive Changes**

- A. Memory
- B. Learning
- C. Reasoning & Judgment

**II. Abnormal Cognitive Changes**

- A. Reversible dementias
- B. Non-reversible dementias
- C. Differential diagnosis (depression vs dementia vs delirium)

**III. Mental Status Exams**

- A. Types of Exams
- B. Uses and Abuses

**IV. Treatments & Interventions for Cognitive Changes**

- A. Reversible Dementias
- B. Non-reversible dementias
- C. Family Interventions

**SEMINAR OUTLINE:**  
**COMPETENCE DETERMINATION  
& INFORMED CONSENT**

**I. Defining Competence**

**II. When/Why is Competence an Issue?**

**III. Assessing Competence**

- Assessment Tools
- Levels of Competence

**IV. Competency and Informed Consent**

- Ethical Foundations
- The Practice & Process of Informed Consent
- Criteria for Assessing Competence to Consent
  - Informability
  - Cognitive and Affective Ability
  - Resolution/Recounting/Resignation

**SEMINAR OUTLINE:**  
**MENTAL ILLNESS IN THE ELDERLY**

**I. Mental Health and Aging: Then and Now**

**II. Differences between Younger and Older Adults**

**III. Rates & Risk Factors of Mental Illnesses for the Elderly**

**IV. Common Mental Illnesses & Treatment**

**Modalities:**

- Depression
- Anxiety
- Psychosis

**V. The Social Worker's Role**

- Interventions
- Assessment
- Making Referrals

**SEMINAR OUTLINE:**  
**CULTURAL COMPETENCE IN WORKING  
WITH OLDER ADULTS**

**I. What is "cultural competence?"**

**II. What cultural information is relevant in working with older adults?**

- A. African and African-American cultures
- B. Latin cultures
- C. Asian cultures
- D. European cultures

**III. What developmental issues in later life have special cultural dimensions?**

- A. Death and dying
- B. Help seeking and dependency
- C. Caregiving and family responsibility
- D. Physical illness
- E. Mental illness
- F. Cognitive impairment

**IV. What are specific cultural competencies in social work practice that have special cultural dimensions?**

- A. Establishing relationships
- B. Interviewing/assessment
- C. Planning and implementing treatment plans
- D. Termination

**V. Special Considerations**

- A. Working with translators
- B. Language and terminology

**SEMINAR OUTLINE:**  
**CAREERS IN AGING**

**I. Types of Gerontology Agency Settings & Social Service Jobs**

- A. HealthCare
- B. Mental Health
- C. Senior Housing
- D. Advocacy
- E. Wellness/Prevention Programs
- F. Caregiver Support Programs
- G. Public Sector Aging Service

**II. Public Sector/Civil Service Employment**

- A. Each county is different
- B. Hiring processes
- C. Job classifications
- D. Finding out about civil service jobs
- E. Civil service examinations

**III. Getting a Job in Aging**

- A. Clarifying your career goals
- B. Assessing your personal attributes and professional skills
- C. Developing a job hunting plan
- D. Finding out about jobs in aging
  - Informational interviews
  - Networking
  - Published resources
- E. Preparing your resume
- F. Interviews

**IV. Continuing Education Resources in Aging**

# Evaluation

As noted above, the overall goal of this training curriculum is to increase the numbers of professional social workers trained to provide effective service and leadership in county departments of adult and aging services. In particular, this training curriculum is designed to promote achievement of the following objectives:

1. Improve social work students' ability to practice effectively with elderly and disabled clients;
2. Increase students' knowledge and understanding of aging programs and services;
3. Increase the number of social work students trained in DAAS;
4. Increase the number of students studying gerontology in Schools of Social Work.

To ensure that the training is achieving these goals, an evaluation should be built into the development and implementation of the training curriculum. This evaluation should assess the adequacy of the training process as well as the extent to which the training is producing the intended effects. Taken together, this information can enable program planners to make timely revisions to maximize the effectiveness of the program.

Information should be gathered from all stakeholders, including students, departmental field instructors, and social work field faculty, using a combination of written evaluations, informal focus groups, and individual informational interviews. Ideally, information should be gathered at several points in the year, so that adjustments can be made if necessary.

Recommended evaluation components include the following:

## **Students:**

As part of the orientation process and again at the end of the training period, students could complete a written questionnaire that assesses: (1) knowledge and understanding of aging programs and services; (2) self-perceived competence in social work with older adults; (3) career interests in aging services.

Knowledge of aging programs and services might be assessed by asking students to provide definitions of common aging programs, such as the following:

## **Definitions:**

AAA  
APS  
HICAP  
RCFE  
MSSP  
IHSS  
PCSP  
Linkages  
Public Guardian  
LPS Conservatorship  
Medicare Part A  
Medicare Part B

A useful tool for evaluating students' self-rated gerontological social work competence has been developed by the Council on Social Work Education in conjunction with the John A. Hartford Foundation Practicum partnership projects (see Appendix A). Among other uses, these self-ratings can assist students and field instructors to assess students' strengths and weaknesses at the beginning of the training period, identify areas for growth and development, and evaluate students' progress in improving competence at the end of

the training period. Career interests might be evaluated by asking students to rate the likelihood that they will work professionally with elderly clients, and in public aging services, upon completion of their MSW. Differences between scores before and after participation in the training program could easily be tabulated.

In addition, at the end of the training program, students could be asked to complete a brief written questionnaire regarding their satisfaction with specific aspects of the curriculum (see Sample Student Satisfaction Survey, Appendix B). Focus groups or individual interviews could be held with students to gather information regarding their overall experiences in the training program, with particular emphasis on components they found most rewarding and specific recommendations for improvement. These meetings should be held at the end of the training experience, and also informally at several points during the year.

#### **Departmental Field Instructors:**

On a yearly basis, field instructors could be asked to complete a brief written questionnaire regarding their satisfaction with specific aspects of the training curriculum (see Sample Field Instructor Satisfaction Survey, Appendix C). In addition, focus groups or individual interviews could be held with field instruc-

tors, program managers, and other cognizant departmental personnel to gather information regarding their overall experiences with the training program, including the impact of the program on the DAAS' ability to provide effective services to its clients, challenges in implementing the training curriculum, and recommendations for curricular modifications. These meetings should be held at least annually, and preferably more often on an informal basis.

#### **Social Work Field Faculty:**

On a yearly basis, field faculty from participating schools of social work could be asked to complete a brief written questionnaire summarizing the numbers of students receiving education or training in aging services, including students specializing in gerontology, taking aging-related courses, doing field placements in settings serving older adults, or doing field placements specifically in public services with older adults. In addition, focus groups or individual interviews could be held with field faculty, to gather information regarding their overall experiences with the training program, including any ways in which the program has implemented the academic curriculum, challenges in implementing the training curriculum, and recommendations for curricular modifications. These meetings should be held at least annually, and preferably more often on an informal basis.

# *Conclusion*

The training curriculum presented in this manual is designed to assist Departments of Adult and Aging Services and social work education programs to improve their capacity to train social workers to work effectively with aging individuals. Materials can be used to enhance current internships being offered by DAAS, as well as to establish new training programs. Our hope is that DAAS and schools of social work will work together to prepare increasing numbers of students to serve California's older adult population through the public aging services system.

This curriculum was developed by the Consortium for Social Work Training in Aging (CSWTA) with generous funding from the John A. Hartford

Foundation of New York, as part of its Practicum Partnership Program, an innovative initiative to strengthen social work training in aging. Tested over a three-year period by three schools of social work and six county DAAS in the greater San Francisco Bay Area, this model was shown to be very effective in providing comprehensive training in aging services. Other counties throughout California now have the opportunity to further refine and replicate this training model, in accordance with local resources and training goals. In this way, it is hoped that the model can contribute to better-trained social workers, more effective public aging services, and ultimately a better quality of life for older adults throughout California.

## **Appendix A: Sample Intern Rotation Schedule** **San Mateo County Aging and Adult Services**

**Primary Program:** ADULT PROTECTIVE SERVICES

**Field Instructor:**

**Training Coordinator:**

**Fall Semester:** The fall semester consists of orientation to student's Primary Program area (APS), and rotations through Secondary Program areas (MSSP/Linkages, IHSS/Public Authority, Public Guardian, AAA). At the end of each training period, students will meet with the Training Coordinator regarding their questions and what they learned.

**Week 1-5:** (Sept. 3 – Oct. 5) Primary program area ~ APS

- Receive brief overview of the Division as a whole
- Receive basic orientation to Adult Protective Services including:
  - Program goals/objectives
  - Organizational structure
  - Staffing
  - Clientele & eligibility criteria for services
- Meet program staff
- Attend weekly unit meetings: Scheduled Thursdays @ 8:30am
- Accompany staff on home visits
- Schedule/contact follow-up interviews with primary program staff
- Schedule site visits to agencies related to APS
- Draft Learning Contract

**Week 6:** (Oct. 8-12) Rotation through MSSP/Linkages

- Receive basic introductions to program including:
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Accompany staff on home visits to observe enrollment and reassessment process
- Make site visit to Adult Social Day/Adult Day Health Program
- Review client charts/documentation requirements
- Attend staff meeting/care planning

**Week 7:** (Oct. 15-19) Primary Program – APS

- More in-depth orientation including:
  - Management information systems

- Record keeping and documentation requirements
- Program budget and funding sources
- Accompany staff on home visits
- Make site visits to agencies related to program
- Observe intake and assessment process
- Attend staff meeting – Thursday @ 8:30am
- Finalize Learning Contract

Week 8: (Oct. 22-26) Rotation through Area Agency on Aging (AAA)

- 8:30 APS unit Meeting
- 10:00-12:00 AAA and Commissions Overview of Programs
- 1:00 APS

Week 9: (Oct. 29-Nov. 2) Rotation through IHSS/Public Authority

- Receive basic introduction to program including:
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
  - Eligibility criteria for services
- Accompany staff on home visits to observe intake and assessment process
- Review client charts

Week 10: (Nov. 5-9) Primary Program – APS

- Accompany staff on home visits
- Attend staff meeting – Thursday @ 8:30am
- Conduct an intake with staff supervision
- Co-conduct an assessment with staff, write up assessment for review

Week 11: (Nov. 12-16) Rotation through Public Guardian

- Receive basic introductions to program including:
  - Relevant state statutes re: probate and conservatorship
  - Program goals/objectives
  - Organizational structure
  - Funding sources and budget
  - Staffing
  - Clientele served
- Accompany staff on home visits
- Review charts
- Attend conservatorship hearing
- Attend LPS hearing
- Attend staff meeting

Week 12: (Nov. 19-23) Thanksgiving Holiday

Week 13: (Nov. 5-16) Primary Program – APS

- Accompany staff on home visits
- Attend staff meeting – Thursday @ 8:30am
- Conduct an intake with staff supervision
- Co-conduct an assessment with staff, write up assessment for review

Week 14: (Dec. 3-7) Primary Program – APS

- Begin casework co-assignment with staff

Week 15: (Dec. 10-14) Primary Program – APS

- Thursday, Dec. 13, 2-4pm: In-Service: "Working with the Difficult, Resistant Client"
- Friday, Dec. 14: Rotation through Area Agency on Aging (AAA)

Week 16: (Dec. 17-21) Primary Program – APS

- Continue casework co-assignment with staff

**Spring Semester:** Students will receive incremental case assignments that include a diverse case mix, and that interrelate to other program areas when possible. Additional site visits and shadowing of staff in other program areas will be scheduled throughout the semester.

**APS:**

Students will receive independent assignments of at least one case of each of the following types after having shadowed at least one worker on a similar case, and after receiving preparatory information.

- Self-neglect case
- Physical abuse case
- Financial abuse case
- Neglect case
- Care management case

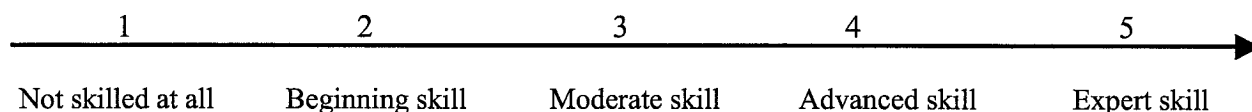
Preparatory information for case assignments to include:

- Theoretical information about each type of abuse
- Indicators of each type of abuse
- Information in Policy & Procedure Manual relevant to each type of case
- Factors which indicate need for case management
- Types of resources available and most commonly used for each type of abuse
- Cultural factors/ considerations relevant to each type of abuse

## HARTFORD PRACTICUM PARTNERSHIP PROGRAM GERIATRIC SOCIAL WORK COMPETENCY SCALE

This scale enables students to rate their own skills in gerontological social work practice. The following are a listing of skills recognized by geriatric social workers as important to work effectively with and on behalf of older adults and their families. For some skills, examples are provided as illustrative not inclusive. **Please use the scale below to thoughtfully rate your current skill:**

- 1 = Not skilled at all (I have no experience with this skill)
- 2 = Beginning skill (I have to consciously work at this skill)
- 3 = Moderate skill (This skill is becoming more integrated in my practice)
- 4 = Advanced skill (This skill is done with confidence and is an integral part of my practice)
- 5 = Expert skill (I complete this skill with sufficient mastery to teach others)



**Please give us any comments and/ or suggestions regarding the skills in each section.**

### I. VALUES AND THEORETICAL PERSPECTIVES

**Skill Level  
(0-5)**

- |   |       |
|---|-------|
| 1 Assess and address values and biases regarding aging.   | _____ |
| 2. Respect and promote older adult clients' right to dignity and self-determination.  | _____ |
| 3. Apply ethical principles to decisions on behalf of all older clients with special attention to those with limited decisional capacity.       | _____ |
| 4. Address diversity among older adult clients, families, and professionals (e.g., class, gender, and sexual orientation).                      | _____ |
| 5 Address the cultural, spiritual, and ethnic values and beliefs of older adults and families.  | _____ |
| 6. Relate concepts and theories of aging to social work practice (e.g. cohorts, normal aging, life course perspective, social exchange theory). | _____ |
| 7. Relate social work perspectives and related theories to practice with older adults (person-in environment, cognitive behavioral theory)      | _____ |
| 8 Identify issues related to losses, changes and transitions over their life cycle in designing interventions.                                  | _____ |

9. Support persons and families dealing with end of life issues related to dying, death and bereavement. \_\_\_\_\_

10. Enact the perspective and values of social work in geriatric interdisciplinary practice while respecting the roles of other disciplines. \_\_\_\_\_

Comments \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. ASSESSMENT: INDIVIDUAL AND FAMILY**

**Skill Level  
(0-5)**

1. Use empathy and sensitive interviewing skills to engage older clients in identifying older adult's strengths and problems. \_\_\_\_\_

2. Adapt interviewing methods to potential sensory, language, and cognitive limitations of the older adult. \_\_\_\_\_

3. Conduct a Comprehensive Geriatric Assessment (CGA) (bio-psychosocial evaluation). \_\_\_\_\_

4. Ascertain health status and measure functioning (e.g. ADLs and IADLs) of older clients. \_\_\_\_\_

5. Assess cognitive functioning and mental health status of older clients (e.g. depression, dementia). \_\_\_\_\_

6. Assess social functioning (e.g. social skills, social activity level) and social support of older clients. \_\_\_\_\_

7. Assess the needs and level of stress and burden of families and other caregivers. \_\_\_\_\_

8. Administer and interpret standardized assessment and diagnostic tools that are appropriate for use with older adults (e.g. Depression scale, Mini-Mental Status Exam). \_\_\_\_\_

9. Develop clear; timely, and appropriate service plans with measurable objectives for older adults. \_\_\_\_\_

10. Reevaluate and adjust service plans for older adults on a continuing basis. \_\_\_\_\_

Comments \_\_\_\_\_  
\_\_\_\_\_

---

---

### III. INTERVENTION: INDIVIDUAL AND FAMILY

**Skill Level  
(0-5)**

1. Establish rapport and maintain an effective working relationship with older adults and family members. \_\_\_\_\_
2. Enhance the coping capacities and mental health of older persons through a variety of therapy modalities (supportive, psychodynamic). \_\_\_\_\_
3. Utilize group interventions with older adults and their families (bereavement groups, reminiscence groups). \_\_\_\_\_
4. Mediate situations with angry, hostile and resistant older adults and family members. \_\_\_\_\_
5. Engage caregivers in reducing their stress and burdens and maintaining their own mental and physical health. \_\_\_\_\_
6. Provide social work case management to link elders and their families to resources and services. \_\_\_\_\_
7. Use educational strategies to provide older persons and their families with information related to wellness, disease management (e.g. Alzheimer's disease, end of life care). \_\_\_\_\_
8. Apply skills in termination in work with older clients and their families. \_\_\_\_\_
9. Advocate on behalf of clients with agencies and other professionals in accessing quality services for older adults. \_\_\_\_\_
10. Adhere to laws and policies related to older adults (e.g. elder abuse reporting, legal guardianship, advance directives). \_\_\_\_\_

Comments \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### IV. AGING SERVICES, PROGRAMS AND POLICIES

**Skill Level  
(0-5)**

1. Outreach to older adults and their families to insure appropriate use of the service continuum (e.g. health promotion, long term care, mental health.) \_\_\_\_\_
2. Adapt organizational policy, procedures and resources to facilitate the provision of services to

diverse older adults and their family caregivers.

\_\_\_\_\_

3. Identify and develop strategies to address service gaps, fragmentation, discrimination, and barriers that impact older persons.

\_\_\_\_\_

4. Include older adults in planning and designing programs

\_\_\_\_\_

5. Develop program budgets that take into account diverse sources of financial support for the older population.

\_\_\_\_\_

6. Evaluate practice and programs in order to promote effective outcomes for older adults.

\_\_\_\_\_

7. Apply evaluation and research findings to improve practice and program outcomes.

\_\_\_\_\_

8. Advocate and organize with the public, agencies, and legislators to promote the needs and issues of a growing aging population.

\_\_\_\_\_

Comments

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Appendix C: Sample Student Satisfaction Survey

### **Overall**

(1) Indicate your level of **agreement or disagreement** with the following statements by marking the appropriate box which best captures your experience:

	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
My Field Instructor was supportive, knowledgeable and available for consultation.					
The overall learning environment at my internship was welcoming and positive.					
As a result of this training experience, I feel more confident working with older adults.					
I would recommend this internship to other students.					
I received adequate support from my school's faculty liaison.					
The agency staff were responsive and genuinely interested in my training.					
I was provided with the resources I needed to perform my assignments (e.g. adequate space, computer, telephone).					

### **Program Rotations**

(2) Indicate your level of **agreement or disagreement** with the following statements by marking the appropriate box which best captures your experience:

	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
The information provided through the program rotations was essential to my ability to perform effectively.					
The intermittent scheduling of the program rotations was an effective way to introduce these program areas.					
The program rotations were well coordinated.					
The program rotations provided me with a useful orientation to a range of programs and services.					
Overall, the staff involved in the program rotations were welcoming and prepared .					
The program rotations could be spread out throughout the entire year without significantly affecting my ability to perform effectively.					
I had adequate time to develop practice skills, even with time spent completing the orientation/rotations.					

## Appendix D: Sample Field Instructor Satisfaction Survey

### Program Rotations

(1) Indicate your level of **agreement or disagreement** with the following statements by marking the appropriate box which best captures your experience:

	Strongly Disagree	Disagree	No Opinion	Agree	Strongly Agree
a. The orientation provided through the program rotations was essential to my student's ability to perform effectively.					
b. The intermittent scheduling of the program rotations was an effective way to introduce these program area..					
c. The scheduling of program rotations would be better scheduled together in the beginning of the internship rather than intermittently throughout the semester.					
d. The program rotations were well planned and coordinated.					
e. The program rotations provided students with a useful orientation to a range of programs and services.					
f. Overall, the lengths of the program rotations were about right in length for providing a sufficient understanding of the department's operations.					
g. The program rotations could be spread out throughout year without significantly affecting the student's ability to perform effectively.					
h. Students had adequate time to develop practice skills, even though they spent significant time completing the program rotations..					
i. Because of the time students spent in the program rotations, I had to alter the way I organized their assignments.					
j. I would encourage other MSW staff to become Field Instructors.					

(2) If you altered the way in which you **organized your student's assignments** due to the program rotation schedules that students completed, please describe what alterations you made and why:

(3) What were the **most useful aspects** about having the students complete rotations through of all the department's program areas?

(4) What were the **disadvantages**, if any, of having the students complete rotations through of all the department's program areas?

(5) If you could **redesign the program rotations**, what would you suggest regarding:

(a) the content of the rotations

(b) the scheduling of the rotations

(c) other comments:

(6) Do you have any **suggestions about training resources** that would have helped you in your work with your students? (ex. books, trainings, etc.)

(7) Did you have **adequate administrative support** from your department regarding your role as a field instructor?  
\_\_\_ YES \_\_\_ NO

PLEASE COMMENT:

(8) Did your students' **school provide needed support** for you and your students?  
\_\_\_ YES \_\_\_ NO

PLEASE COMMENT:

(9) Please provide **other comments** about your experience this year as a Field Instructor that will help us to improve it for you and others in the future: