**Table 1: Generalist Roles and Performance Standards**

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| **Role** | **Description** | **Performance Standards** |
| Advocate | “To assist clients in upholding their rights to receive resources and services or to actively support causes intended to change programs and policies that have a negative effect on individual clients or client groups.” (Sheafor) | 1. Gather information to determine client’s eligibility for a service or resource. 2. Determine the nature and magnitude of barriers to service external to client. 3. Select strategy for advocacy based on finding most collaborative, least confrontational method of obtaining entitlement (e.g., collaboration, negotiation, mediation, administrative appeal, legal action). Class advocacy may include changing agency policies and procedures, social policies, or laws. 4. Implement selected strategy and evaluate results. Repeat steps 2 to 4 as necessary. 5. Document each step in the process in a timely manner. |
| Assessment | A systematic process of acquiring an understanding of a client’s needs and desires, motivation, priorities, and capacity for change. | 1. Define the domain(s) to be assessed. 2. Identify an instrument to use in performing the assessment. This may include a formal, written process in use at the agency. 3. Perform the assessment with an agency client using the tool described in #2. 4. Write results of assessment clearly differentiating factual information from opinions and impressions. 5. Have field instructor or person delegated by her/him critique performance and report of results. |
| Broker | Getting access to needed services and resources for an individual or family. | 1. List needs in order of priority. 2. Assess client capabilities and motivation to access and use various resources. 3. Identify services and programs that can meet the client’s needs for which s/he client is eligible. 4. Facilitate access to the needed services or resources. 5. Document each step in the process. |
| Care Coordinator | “The activity of developing, implementing, and monitoring a social service plan to meet the needs of an individual or family.” (NASW Guidelines for the Selection and Use of Social Workers in Sheafor) | 1. Identify client (individual or family) needs and list in order of urgency. 2. Arrange and coordinate delivery of services and supports by two or more agencies. 3. Monitor receipt of services – intervene to reduce or eliminate any barriers that are present. 4. Document contact and process according to agency’s standards. |
| Case Finding/Outreach | **Case finding**: “searching out and identifying those individuals or groups who are vulnerable to or experiencing problems for which the social worker or agency has responsibility to provide needed help and service.” (Dictionary)  **Outreach**: the process of bringing “services and information about the availability of services to people in their homes or usual environments.” (Dictionary) | 1. Specify the service and population (type of client) with unmet need(s) to be targeted. 2. Write strategy for reaching the population or clients with the unmet need(s). Specify potential benefits to clients and how results will be evaluated. Evaluation should include time frames. 3. Implement strategy. 4. Produce written evaluation of results. |
| Case Work | Process designed to help individuals and families solve interpersonal, socioeconomic, and environmental problems through direct face-to-face relationships. | 1. Establish rapport with individual or family client. 2. Identify issues to be addressed in collaboration with client. 3. Write a contract with client specifying plan to resolve issues. Contract should be specific with timelines. 4. Periodically monitor client’s progress providing encouragement and problem solving as needed. 5. Assess and document results of contract. 6. Terminate with client after objectives achieved. |
| Counselor | A procedure in guiding individuals, families, groups, and communities by such activities as giving advice, delineating alternatives, helping to articulate goals, and providing needed information. | 1. Identify the client. 2. Facilitate description of issues concerning client employing “active listening” methods. 3. Assist client to identify alternatives available by providing information and assistance in formulating the issues with greater precision. 4. Help client establish realistic goals. 5. Document process with process recording annotated to indicate how “active listening” skills were or should have been utilized. |

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| Discharge Planner | A service in hospitals and institutions designed to help the patient or client make a timely and healthy adjustment from care within the facility to alternative sources of care when the need for institutional care has passed. | 1. Assess client needs that must be addressed for transition to another level of care. 2. Educate client and/or others with a significant stake in the client’s welfare to those needs and their importance. Also provide client information about adaptations that may be necessary in his/her life to accommodate his/her condition. 3. Identify possible options to obtain care, services, or equipment necessary to meet the client’s needs. 4. Facilitate access to the care, services, or equipment selected by the client and/or significant others. 5. Document process following agency standards. |
| Educator/Trainer | Formal process “to prepare clients or the general public with knowledge and skills necessary to prevent problems or enhance social functioning.” (Sheafor) | 1. Specify target audience and anticipated functional outcomes for the educational process. Subjects could include skill development in communicating, socialization, parenting, managing strong emotions, self care, stress reduction, or activities of daily living. 2. Write or identify curriculum designed to achieve functional outcome. State rationale for using the curriculum employed. 3. Design an evaluation measure. 4. Implement curriculum. 5. Write a critique of process and evaluation of results. |
| Group Worker | Both “an orientation and method of intervention in which small numbers of people who share similar interests or common problems convene regularly and engage in activities designed to achieve their common goals objectives also include exchanging information, developing social and manual skills, changing value orientations, and diverting antisocial behaviors into productive channels.” (Dictionary) | [Limited to psycho-educational groups, self-help groups, support groups, task groups, and skill development groups. See Clinician for psychotherapy process groups.]   1. State the purpose and objectives of the group. 2. State criteria for participation in group. 3. Establish group rules and guidelines (for already established group, write them) 4. For groups other than support or self-help:    1. state number of sessions or date by which group objectives will be attained;    2. write lesson plan or agenda for each session; 5. Lead and document 6 or more group sessions (10 if self-help or support group without structured content; 6. Prepare written evaluation of results including critique of facilitator. |
| Mediator/Arbitrator | A formal process intended to resolve disputes between the client and other persons or organizations without litigation.  (NASW Standard for Social Work Mediators) involves demonstrating the ability to appropriately conduct mediation which is mutually acceptable, impartial, and helps the participants negotiate a consensual and informed settlement. A mediator should be able to reduce the obstacles in communication, maximize the exploration of alternatives and address the needs of those who are involved. The mediator’s role is to empower the system so that it does not have to resort to outside parties, such as the courts or arbitrators, to make the decisions. | 1. Document parties accept mediation process without reservation and impartiality of mediator. 2. Identify the area(s) of dispute and issues on which the parties agree. 3. Probe to determine each party’s greatest and least critical needs. 4. Facilitate suggestions from the parties to resolve the dispute – reinforcing those leading toward convergence. Assure that no party is being pressured or intimidated into an unfair agreement. 5. Suggest possible resolutions when parties appear unable to progress on their own. 6. Facilitate convergence toward a mutually acceptable resolution. Write agreement for parties to sign when achieved. 7. Document with process recording and written transcript with annotations by student and supervisor critiquing student’s performance. |
| Program Developer/Planner | Systematic process of collecting information, identifying alternative courses of action, and making recommendations to those empowered to implement them. | 1. State specific issue or problem. 2. List specific requirements for solution and any proscriptions. 3. Document research used as basis for generating alternative courses of action. 4. Select action and state how it best meets requirements specified in #1 above. 5. Formulate recommended action(s) and disseminate to people empowered to act on them. 6. Evaluate and critique process in respect to resolving the specific issue or problem identified in step #1. |
| Protection of Vulnerable Individuals | The process of investigating reports of harm to dependent individuals and making provision for an array of services necessary to protect them from further harm and provide for their welfare. | 1. State criteria for class of people to be protected. 2. Define type and magnitude of harm subject to protection. 3. Investigate report of suspected harm to an individual member of the class defined in #1. 4. Write report of investigation and conclusions/recommendations for further action. Report must:    1. identify alleged victim and perpetrator (these may be blacked out before submission to instructor);    2. specify alleged harm done to victim;    3. state facts established by investigation;    4. identify issues on which stories or evidence are contradictory;    5. state conclusions and rationale for arriving at these conclusions;    6. make recommendations for further action based on findings and conclusions. |
| Resource Information & Referral | Assessing needs and informing people of existing benefits and programs and the procedures for obtaining or using them. (Dictionary) | 1. Assist client in specifying the issue or problem for which s/he is seeking assistance at this time. Establish parameters for referrals including cost, time, distance, sensitivity to diversity issues, etc. 2. Determine readiness of client to accept a referral by taking action to follow through on it. 3. Determine the best available resource referrals that meet the client’s needs. 4. Present more than one option to client including the potential benefits and losses of each. 5. Facilitate decision by client and insure that client has understanding of risks and benefits of his/her choice. 6. Assist client to gain access to resource including writing necessary contact information. If possible, have client place call from office or make call on client’s behalf. Whenever possible, provide the client with the name of a specific contact person. Document reason if not possible. 7. If the client’s problem is complex, provide the client with a brief written statement, addressed to the resource, detailing the problem and the services desired by the client. 8. Make arrangements for client to get to resource if s/he is unable to do so without assistance. This includes help when barrier is psychological as well as physical. 9. Obtain client’s permission to follow up and determine outcome of referral – preferably by a report back to you from the client. 10. Document each step of the process. 11. Repeat until at least 10 clients have completed every step in the cycle. |