

# 3

## THE PLAN AND PACE OF LEARNING IN FIELD

This chapter will explore the plan for and pace of your learning in field. Establishing a plan for your learning is critical and begins with drafting your learning plan. The *pace* of your learning refers to how slowly or quickly you will move from orientation and training to independent practice and requires that you consider several key concepts and steps.

### THE LEARNING PLAN

---

The learning plan is a crucial document in several ways. First, the learning plan provides a sense of direction for your learning that ensures that you have an effective field experience and ultimately accomplish your goals by the conclusion of field. Second, the learning plan helps you pace your learning, meaning it will specifically reference tasks that reflect the process as you move from orientation and training to independent practice. For instance, the learning plan will include tasks that reference shadowing, coworking, and, ultimately, completing tasks independently. Third, the learning plan assists in the fulfillment of the overall purpose of field, which is threefold:

1. to integrate classroom and field,
2. to become socialized to the profession, and
3. to develop as a generalist, ready to apply your generalist training to your practice or to your advanced practice field experience.

It is interesting to note that constructing your learning plan is a useful learning experience in its own right because it mirrors the engagement, planning and contracting, and evaluation phases of the planned change process that you will use with client systems. By developing your learning plan, you are using and integrating what you have learned in the classroom with an important activity of field. Furthermore, writing a learning plan requires competence in professional writing: You need to be able to develop agreed-upon goals and objectives, determine appropriate tasks to meet the goals and objectives, implement strategies identified in the plan, and monitor and evaluate your plan, all of which are important skills for a social worker.

This chapter will provide an overview of the information you need to develop your learning plan and instructions for using your learning plan as an educational tool during field. The chapter covers the elements of a learning plan, including writing learning objectives, selecting

the tasks and roles you will engage in to meet your objectives, and developing a plan for evaluation. In addition to this, the chapter will discuss how the learning plan can act as a road map throughout field, with opportunities to consider the pace of learning and monitor progress.

## Elements of the Learning Plan

As mentioned earlier, certain elements need to go into a learning plan to make it an effective and useful document. A well-constructed learning plan should include

- the goals and objectives of field,
- the tasks and roles you will engage in at your site to meet the goals and objectives,
- a plan for evaluation,
- demographic information, such as your name and your field instructor's name, the agency's name, dates of the plan, and perhaps your title and role, and
- signatures to document agreement by all involved parties.

To familiarize yourself with your learning plan and identify the preceding elements, review the learning plan required by your program. In all likelihood, this document can be found online or in your program's field manual.

## Goals and Objectives

The first step in developing a learning plan is to identify your goals and objectives for field. The ability to identify goals and objectives is grounded in your knowledge of what goals and objectives are and your skill level in writing them. Knowledge about goals and objectives would fall within the curricular area of practice, specifically the planned change process phase of planning and contracting.

In social work practice, a *goal* is defined as a “specific statement of intended outcomes. Goal statements should be clear, meaningful, and attainable. Whenever possible, they should reflect the client's priorities and be stated in the client's own language” (Kagel & Kopels, 2008, p. 69). Obviously, you are not a client, but the ideas reflected in the preceding definition hold true for you in field. That is, the goals you set for field should reflect the intended outcomes of field education. Your goals should be “clear, meaningful, and attainable” (p. 69), in your own words, and reflect your personal goals and interests. Furthermore, goals are the end result: As you are writing your learning plan, ask yourself what you need and hope to accomplish as a result of field.

Although the terms *goals* and *objectives* are often used interchangeably, they are different. Goals tend to be broad, sweeping statements, whereas an objective “is more specific and written in a manner that allows and facilitates measurement and evaluation” (Sheafor & Horejsi, 2015, p. 282). As Sheafor and Horejsi (2015) state,

A properly developed objective meets the following criteria:

- It usually starts with the word *to*, followed by an action verb.
- It specifies a single outcome to be achieved.
- It specifies a target date for its accomplishment.
- It is as quantitative and measurable as possible.
- It is understandable to the client and others participating in the intervention.
- It is attainable, but still represents a significant challenge and a meaningful change. (p. 283)

In the context of field, your goals will reflect large, overarching outcomes of field education and most often include the use of action-oriented verbs such as *to know*, *to learn*, *to develop*, and *to demonstrate*. Given that goals tend to be broad and sweeping in their scope, once you have determined the global outcomes of field education, you will then want to break those into smaller, attainable objectives. Objectives, like stepping stones, will help you meet the larger goal, such as getting across a river. An objective tends to be smaller in its scope, specific, well-defined, concrete, and measurable. I particularly like the idea of an objective being challenging and meaningful. To lend each objective concreteness, you need to indicate what you will be doing, how you will do it, and by when. The type of language that is helpful when writing objectives is language that reflects *behavior*, meaning what you will do. Examples of good action words for field objective could include but are not limited to *attend*, *schedule*, *participate in*, *cofacilitate*, *conduct*, and *write*. Horejsi and Garthwait (1999) state that “a learning objective brings together in a single outcome statement a goal, a description of learning activities, and evaluation criteria” (p. 22). This particular definition is helpful in field. Thus, using this definition as a foundation, look at a possible learning objective for a student:

1. To learn about the cycle of violence . . . (a goal)
2. by reading an article and viewing a video . . . (a description of learning activities)
3. and demonstrating knowledge by presenting content in supervision by end of September and applying knowledge to at least one case by the end of October. (evaluation criteria)

This type of learning objective is useful to you and your field instructor because it is specific and clearly identifies the intended outcome and what you will do to achieve the objective and provides clarity for how you and your field instructor will evaluate whether or not you met the objective. You and your field instructor can easily measure if you read the article and watched the training video by your ability to present the content and apply the knowledge to a specific case in supervision. Thus, having clearly worded objectives takes the mystery out of evaluation and enables you and your field instructor to determine that an objective was met or not met.

Now that we have defined goals and objectives and reviewed the components of an objective of learning, the next step is to consider your learning tasks.

### Multilevel Learning Tasks

The tasks that a social worker engages in to assist clients in meeting their goals and objectives are critical to effective social work practice. Sheafor and Horejsi (2008) define a *task* as

some specified and observable problem-solving action or step that can be evaluated in terms of whether it was achieved or completed. Preferably, a task is an action that can be accomplished in a matter of days or at the most a couple of weeks. A task can be viewed as one of the many steps or short-term activities that must be completed to achieve an objective. (p. 333)

This definition is applicable to field in that you, your field instructor, and field director will all be participating in identifying what you will be doing at the agency to achieve the objectives of learning. The learning tasks will come from a variety of sources. The first source for identifying learning tasks will come from the agency. You want to consider the activities that relate to what the social worker does in the agency. You can determine many of the expected activities by reviewing the current job description of the position with which your role is most closely aligned. By reviewing the job description, you will obtain useful information to translate into your learning plan. Additional sources for researching and identifying your learning tasks will come from activities related to the population served and activities that reflect the social problems addressed by the

agency. Second, you should consider your own personal interests related to your development as a social worker. Again, reflect on what you would like to get out of the field experience and identify tasks aligned to the work you might do. Third, you should consult with your field instructor for ideas for possible tasks that may not be readily apparent. For instance, perhaps you can get involved with a special project or current issue that the agency is experiencing, such as research or program evaluation. Last, look to your program, field director, faculty field liaison, or department faculty for suggested and possibly required learning tasks as well. For instance, many programs require that students complete process recording. The purpose of gathering options from all these sources is to ensure that you are engaging in a comprehensive array of learning tasks.

In addition to identifying the specific learning tasks that you will engage in at your agency, you also need to consider the scope of the learning tasks that you need to develop as a competent generalist practitioner, ready to practice or to apply your generalist training to advanced field instruction. As you will recall from Chapter 1, the generalist field education approach (GFEA) requires students to engage in multilevel tasks. By including multilevel tasks in your learning plan, you ensure that you develop the skills necessary to practice at multiple levels. This is important in order to prepare you to assume a variety of different types of positions and job responsibilities after you complete your education.

Multilevel tasks fall within four primary levels or areas of practice that are specifically referenced in the educational policies and accreditation standards (EPAS) (Council on Social Work Education [CSWE], 2015). The primary levels are *micro* (individuals and families), *mezzo* (treatment and task groups), and *macro* (organizations, communities, and may include policy/legislature and research). In addition, given field education's emphasis on socialization and professional development, the last level or area of tasks would be those that contribute to your professional socialization.

Sometimes it is hard to identify at what level—micro, mezzo, macro, or professional socialization—a specific field task fits within and or to take advantage of a particular task that may present itself. This most often occurs when students engage in mezzo, macro, or professional socialization tasks, such as attending staff meetings, engaging in administrative tasks, reading training materials, conducting research, and completing documentation. However, when a task is clearly defined and linked to a particular level of practice, students are better able to identify the purpose the task can play in their development as a social worker. As a result, the student develops a better understanding of the depth and breadth of social work practice at all levels of practice.

So far, the necessity of having multilevel practice experiences has been established; however, in all likelihood, your tasks will be clustered in one or two levels that reflect the services and role of the social worker in the agency, meaning you may have more tasks in one area than the other areas. This is understandable because you probably selected the agency in part due to the services and role of the social worker and had a desire to learn to practice in that particular area. Yet, your development and socialization as a generalist practitioner may be hampered if you don't have opportunities to complete tasks at other levels as well. Thus, you may need to look beyond the social worker's role within the agency to identify additional opportunities, as many social workers provide specific tasks within an agency.

For example, I worked with a student at an agency who provided primarily micro-level case management services to individuals. The student loved the agency and services and was receiving an excellent learning experience. However, the experiences were heavily focused on practice with individuals. As a result of the need to engage in multilevel tasks, the student identified two mezzo-level learning tasks: (1) cofacilitate a group and (2) conduct educational presentations in the community. These particular services were done by another group of social workers in the agency, so the field instructor had to connect the student with the other social workers. Fortunately, it ended up being a fairly easy process to set up the learning tasks. As a result, the student added two mezzo practice tasks to the learning plan, and to the field instructor and field liaison's satisfaction, the student reported that the work not only complemented the case management services but also helped develop important group practice skills. By the completion of the field experience, the student felt better prepared as a soon-to-be professional social worker.

To facilitate the process of identifying the multilevel learning tasks, complete Integrative Activity 3.1. Once you have identified your multilevel tasks, include them in your learning plan. The list came from several sources, namely agencies, the literature (Birkenmaier & Berg-Weger, 2007; Hendricks, Finch, & Franks, 2005; Plionis, Bailey-Etta, & Manning, 2002; Riebschleger & Grettenberger, 2006), and input from students, faculty, and field instructors. The list is not exhaustive; you can engage in a task that is not on this list as long as it is a social work task and can be linked to a goal statement.

## INTEGRATIVE ACTIVITY 3.1

### IDENTIFYING MULTILEVEL LEARNING TASKS

**Directions:** Identify the tasks that you will engage in at your agency by placing a check mark in the box next to each task. You must select tasks from all four areas.

#### Educational Policy 2.0—Generalist Practice

To promote human and social well-being, generalist practitioners use a range of prevention and intervention

methods in their practice with diverse individuals, families, groups, organizations, and communities, based on scientific inquiry and best practices. The generalist practitioner identifies with the social work profession and applies ethical principles and critical thinking in practice at the micro, mezzo, and macro levels.

#### Professional Socialization

- Set a supervision time.
- Attend supervision sessions.
- Develop and use an agenda during your supervision session.
- Keep supervision session notes.
- Orient to the agency and field education.
- Tour the agency.
- Introduce yourself to all staff.
- Conduct an agency analysis.
- Examine your mission, goals, and objectives.
- Learn about programs and services.
- Learn about funding and review a budget.
- Review the organizational structure; identify or place yourself on the organizational chart.
- Obtain and read agency policies and procedures.
- Develop and complete a training plan.
- Review and complete agency documentation.
- Complete professional paperwork, such as mileage reimbursement or incident reports.
- Review agency client system records.
- Write reports.
- Identify your title.
- Identify your primary tasks.
- Set up your work space; obtain computer/voice mail access.
- Identify your work schedule.
- Discuss the dress code.
- Engage in ethical behavior.
- Read the National Association of Social Workers (NASW) code of ethics and any agency ethical standards.
- Identify common ethical dilemmas in a practice setting.
- Identify and analyze ethical dilemmas using the NASW code of ethics.

(Continued)

(Continued)

	<ul style="list-style-type: none"> <li>• Conduct an ethics analysis of agency practices. ☐</li> <li>• Develop a professional identity. ☐</li> <li>• Join a social work club or professional organization (i.e., NASW, community group). ☐</li> <li>• Identify philanthropic activities. ☐</li> <li>• Engage a mentor. ☐</li> <li>• Attend agency/community/campus trainings/events. ☐</li> <li>• Engage in self-care activities and monitor your stress and burnout levels. ☐</li> <li>• Complete field paperwork. ☐</li> </ul>
<b>Micro—individuals and families</b>	<ul style="list-style-type: none"> <li>• Shadow services to individuals and families. ☐</li> <li>• Reach out to individual clients and families by telephone or in writing to set up appointments for interviews. ☐</li> <li>• Conduct intake interviews. ☐</li> <li>• Conduct assessments with individuals and families. ☐</li> <li>• Complete a social history. ☐</li> <li>• Complete an ecomap. ☐</li> <li>• Complete a genogram. ☐</li> <li>• Engage in casework/case management services with individuals and families. ☐</li> <li>• Establish a caseload. ☐</li> <li>• Contract with a client to develop a service plan. ☐</li> <li>• Develop and implement interventions and plans. ☐</li> <li>• Complete documentation. ☐</li> <li>• Complete case notes. ☐</li> <li>• Make referrals—broker on behalf of clients. ☐</li> <li>• Analyze your communication skills. ☐</li> <li>• Complete your interview checklist. ☐</li> <li>• Complete process recording. ☐</li> </ul>
<b>Mezzo—group tasks/treatments</b>	<ul style="list-style-type: none"> <li>• Observe a treatment group. ☐</li> <li>• Cofacilitate a treatment group. ☐</li> <li>• Gather information to determine client interest in a group (needs assessments). ☐</li> <li>• Develop an outline for planning a group. ☐</li> <li>• Develop curriculum/group session activities. ☐</li> <li>• Complete group notes and other required documentation. ☐</li> <li>• Increase your knowledge of types of groups/research group skills. ☐</li> <li>• Facilitate group sessions. ☐</li> <li>• Attend team meetings, interdisciplinary treatment team meetings, and individualized education program meetings. ☐</li> <li>• Attend a task group/join a committee. ☐</li> <li>• Cofacilitate a task group meeting; develop an agenda, write minutes, learn parliamentary procedure from <i>Robert's Rules of Order</i> by Henry Robert. ☐</li> <li>• Complete meeting minutes. ☐</li> <li>• Facilitate a task group. ☐</li> </ul>
<b>Macro—organizational practice or community policy/legislature, or research</b>	<ul style="list-style-type: none"> <li>• Engage in organizational practice. ☐</li> <li>• Participate in fund-raising activities. ☐</li> <li>• Engage in grant writing. ☐</li> <li>• Engage in research activities to support activities of the organization; assist in the agency's annual report and auditing. ☐</li> <li>• Explore/participate in program evaluation. ☐</li> <li>• Write flyers, brochures, or newsletters regarding agency services or programs. ☐</li> <li>• Attend board meetings. ☐</li> <li>• Analyze social/agency policy(ies). ☐</li> <li>• Write a policy. ☐</li> </ul>

- Develop and implement a program.
- Engage in community organizing.
- Conduct a community needs assessment.
- Participate in a community action/coalition group/task force.
- Develop an agreement to work with another agency, including establishing funding.
- Engage in policy development.
- Research legislative history of an existing or proposed program.
- Engage in advocacy at the legislative/bureaucratic level.
- Prepare and present testimony in support of a policy or program reform.
- Engage in political practice.
- Participate in voter registration.
- Organize and disseminate information regarding a levy or important issue.
- Participate in a campaign.
- Engage in canvassing, tabling, or phone banking.

Sources: This task list was developed from *Learning to Teach, Teaching to Learn*, by Hendricks, Finch, and Franks, 2005; *The Practicum Companion for Social Work*, by Julie Birkenmaier and Marla Berg-Weger, 2007; and the Generalist Practice Scale, developed by Riebschleger and Grettenberger, 2006.

If you are asked to complete a task that is not on the list, you will want to determine if it is an appropriate task. To determine if a task is appropriate, explore two things. First, find out if the task is normally completed by the social workers at the agency. If that is the case, then it is fine for you to engage in that task. For example, suppose you were asked to provide child care for the parents in a substance-abuse group meeting. In doing so, you learned that all the social workers in the agency rotate through the role because attendance at the group is better if child care is offered. In this case, taking on the task might fit the criterion of being part of a multilevel learning experience. That being said, the student still needs to consider how the task relates to the larger goals and objectives. Assisting in child care could be linked to diversity and cultural competence if working with the children increases the student's understanding of child development, or it could be linked to professional development in the area of fulfilling the role of the social worker in the agency. However, the student also must consider the appropriateness of the task in the context of the time available and as compared to other task opportunities. In other words, a student may not want to spend time each week engaging in child care when other learning options are available. Therefore, a thorough discussion with the field instructor to evaluate all of the preceding possibilities is necessary.

On the other hand, if the agency doesn't normally provide child care and you are asked to do that or if other non-social work staff provides child care most of the time, this might not be an appropriate task for you. For instance, suppose that a student is asked to watch the child while the social worker meets with the child's mom to discuss the case. If child care is usually provided by a non-social work staff member and providing child care is not normally what the social worker would be doing, then attending to the child probably is not an appropriate learning task. Taking care of the child, while undoubtedly important to the work, may actually be taking away from your learning because you would otherwise be observing the social worker working with the mom. Again, the student and field instructor need to discuss and determine the purpose of a task and how the task is linked to the achievement of the student's goals and objectives.

Second, it is important to determine if a particular task has merit and will contribute significantly to your learning, the latter being the most important. However, making a determination about the value of a particular task is not always cut and dry. For instance, suppose you are asked to cover the phones because there is a crisis in the agency and all the staff are pulled into a meeting. Answering the phones at the front desk is not the job of the social worker, but you can help out, as all professionals do from time to time, and the task actually becomes a great learning experience in that the student can speak to clients firsthand and get a sense of the types of

calls the agency gets and what to do with the callers. At the end of the day, this particular task proves to be beneficial, even though it was clearly situation specific; that is, you will not answer the phones on a regular basis, but on that day, doing something that wasn't the social worker's job ended up being productive.

One last example is the opposite of the preceding scenario. In this particular situation, a student was asked by a staff member of the agency to complete a task not normally done by the social worker. It involved performing physical care activities with the client. At the time, the student thought it might not be an appropriate task, but the field instructor was not at the agency and the student did not feel comfortable saying "no." The student completed the task but was very upset about being asked in the first place. Fortunately, the student completed the task without any harm being done to themselves or the client, and the student even reported some benefit in completing the task. However, in a later discussion with the student about the situation, it became clear that the task could have put the student at risk, and the student reported being extremely uncomfortable. The student was told to discuss the situation with the field instructor and establish a plan for determining appropriate tasks and how to handle situations that may come up when the field instructor is not at the agency. This is an example of a situation where a student is asked to do something that is not appropriate or productive and even created some concern on the part of the student.

As shown from all the examples offered, it is extremely important that you determine your primary tasks, ensure that everyone in the agency knows your role and primary tasks, and feel empowered to evaluate the requests that will come up from time to time in your agency. The best way to provide clarity with regard to your tasks is to

- create a well-constructed and comprehensive learning plan,
- identify the tasks and roles you will regularly engage in on the learning plan,
- ask your field instructor to let others in the agency know your role and primary tasks, and
- when and if you are asked to do something outside of your learning plan, pause and reflect on the appropriateness of the task and, if necessary, ask the purpose and goal of the task. If you are still unsure, consult with your field director or faculty field liaison.

The goal is for you to join the agency fully as a team member, which may require flexibility on your part from time to time, while at the same time ensuring that you are not asked to do things that are clearly not related to your development as a social worker.

Now that you are familiar with multilevel learning tasks, the next thing to think about as you are putting your learning plan together is the foundational roles of social work that you may use in conjunction with a task.

### Foundational Roles of Social Work Practice in Field

The GFEA outlined in Chapter 1 requires that students engage in the foundational roles of social work. This is due to the fact that, from a generalist perspective, the foundational roles that the professional social worker uses are critically important to effective practice, as can be seen in its inclusion, implicitly or explicitly, in various definitions of *generalist practice*. I often hear students use the terms *case manager*, *advocate*, *facilitator*, and *educator*, but the students do not usually identify these as foundational roles of social work practice. Instead, students use them in more general ways or understand that a particular role happens to be the name of a particular job, as is the case with the term *case manager*. Conversely, students rarely state, "I brokered today," but regularly talk about referring a client to a service, which is the function of the role of the broker. Thus, it is important to increase your understanding of the foundational social work roles and how those roles are referred to in your agency and to ensure that you have

opportunities to use the roles in your practice in field. This will, in part, be accomplished by including various foundational roles in your learning tasks as well as increasing your knowledge and understanding of the roles you are providing in the context of your position at the agency. For instance, if your agency identifies the primary role of the social worker as a case manager and you will be fulfilling that role as a student, ask yourself, *what does that mean to be a case manager? What is the role of a case manager? How do I manage a case?* As a result of this focused examination and answering these questions, you will become more grounded in that particular role. Last, the more familiar you are with the foundational roles used by the social worker(s) in your agency, the better you will be able to develop competence in attending to your professional roles and boundaries, a practice behavior associated with identifying and conducting yourself as a professional social worker.

Kirst-Ashman and Hull (2009) identify eight foundational roles of social work: counselor, educator, broker, case manager, mobilizer, mediator, facilitator, and advocate (pp. 25–26). With regard to the use of the foundational roles of social work practice, DuBois and Miley (2005) state that

rather than the social worker's starting with the roles or strategies and then determining the plans of action, the nature of the situation should drive the selection of roles and strategies. Client systems' challenges, rather than the preferred methods of practitioners, generate strategies. (p. 229)

The notion of fitting the role to the need versus providing the role because that is what the social worker or agency does at the agency is a critical concept for you to grasp in your practice in field and one that can be complicated by your overarching role within the agency.

In addition to identifying the role of the social worker at the agency and the foundational roles used by the social workers to assist their clients, it is also key to identify the role of other professionals with whom you will work, when applicable. The CSWE (2015) added interprofessional practice to the EPAS, given the increased awareness about the benefits of interprofessional practice for client system outcomes (World Health Organization, 2010). Schaefer and Larkin (2015) provide an overview of how interprofessional education learning opportunities were infused throughout the curriculum in one undergraduate program to ensure the goal of developing this important competency in students. They go on to state that “social work's strength as a profession, rooted in collective practice, can be used to move social work into a leadership position in IPE [interprofessional education]” (Schaefer & Larkin, 2015, p. 179). Thus, it is important to extend this training to field by providing students with the necessary opportunities to develop and demonstrate this competency in their practice. The Interprofessional Education Collaborative identifies the ability to “use the knowledge of one's own role and those of other professions to appropriately assess and address the health care needs of patients and to promote and advance the health of populations” (2016, p. 10) as one of the four core competencies necessary for interprofessional collaborative practice. The best way for you to develop this competence is to increase your understanding of both your role and the role of other professionals in your field setting.

To assist you in the process of meeting all of the expectations above, review and discuss Integrative Activity 3.2 in class or with your field instructor. The first thing this activity asks you to do is to discuss and clarify your role, the role of other professions with whom you will work closely (if applicable), and the foundational roles used by the social worker in his or her practice with client systems. To guide you in this exploration and discussion,

- review the agency job description to determine your role,
- identify the other professions with which you will work closely and determine their role,
- review the professional roles of social work practice and consider the opportunities for using the various roles within the agency, and
- link the various roles to your multilevel learning tasks.

## INTEGRATIVE ACTIVITY 3.2

### IDENTIFYING FOUNDATIONAL ROLES OF SOCIAL WORK IN FIELD

**Purpose:** The purpose of this activity is threefold. First, it will assist you in identifying your role in the agency and the role of other professionals, if applicable. This is accomplished by you and your field instructor (1) reviewing the agency job description of the social worker and (2) deciding together, based on the opportunities, learning objectives, and your interests, what your primary role will look like. Second, the activity will provide you with the opportunity to identify the other professionals with whom you work and their roles. Last, you will review the foundational roles of social work practice and identify tasks in which you will be able to integrate those roles and thus, develop competence.

**Competency 1: Demonstrate Ethical and Professional Behavior**

Social workers understand the profession’s history, its mission, and the roles and responsibilities of the profession. Social workers also understand the role of other professions when engaged in interprofessional teams.

**Educational Policy 2.0—Generalist Practice**

To promote human and social well-being, generalist practitioners use a range of prevention and intervention methods in their practice with diverse individuals, families, groups, organizations, and communities based on scientific inquiry and best practices.

Role of Social Worker in Agency		Primary Role as Student	
(Review the job description of a social worker in the agency and describe it.)		(Identify and describe the student’s primary role.)	
Role of Other Professionals			
(Identify other professionals with whom you will work closely and describe their role within the agency.)			
Foundational Social Work Role	Role Defined	Field Task: Identify the field task(s) and targeted client systems that will enable you to fulfill the identified role.	Processing and Evaluation: Identify how your ability to perform the role will be processed and evaluated.
Counselor	This role is fulfilled by the student when the student provides support, encouragement, and suggestions and assists the client in the planned change process. For example, a student might listen to, support, and explore options for how a mother might handle her child’s problems in school.		
Educator	This role is fulfilled by the student when he or she provides information and teaches within the client system. For example, a student will provide information to the client system about anger management in the context of a group for urban youth.		

Broker	This role is fulfilled when the student links a client system with a needed resource. For instance, the student might refer the client to an Alcoholics Anonymous or a Narcotics Anonymous group.		
Case Manager	This role is fulfilled by the student when he or she coordinates needed services provided by different community agencies. For instance, the student might coordinate the services for a client who is being discharged from the hospital.		
Mobilizer	This role is fulfilled by the student when he or she convenes community people and resources to identify needs. For example, a student might encourage community residents to address crime that is not being addressed through a community policing program.		
Mediator	This role is fulfilled by the student when he or she resolves disputes and conflicts between system members. For instance, the student might work as a go-between for members of a neighborhood and local developers.		
Facilitator	This role is fulfilled by the student when he or she leads groups. For instance, a student might run a group for girls in a community youth program.		
Advocate	This is fulfilled by the student who stands up for and represents the needs or interests of a client so that the client receives resources. For instance, the student may contact the landlord on behalf of the client requesting an extension on an eviction notice.		
Other:			

One role that you as a student in field can target is that of *brokering* or linking clients with needed resources. This is a vital role and can be accomplished by first researching and updating community resources and then linking your clients to a needed resource. Other common roles that students will practice while in field are case manager, advocate, counselor, facilitator, and educator.

In terms of your professional socialization and development, it is necessary to have opportunities to explain your role to clients, staff in the agency, other professionals, students in courses, and faculty. Thus, it may be useful for you to develop a student job description.

Once you have reviewed the eight foundational roles, when you are developing your learning plan and identify tasks, integrate a role into the task whenever possible. For example, going back to the student who was able to add the two mezzo practice tasks, both tasks included a foundational role of social work practice in the task: (1) facilitate a support group and (2) educate clients by conducting community-based presentations. As you can see, both *facilitate* and *educate* were included in the learning task and specifically reference a foundational social work role. By writing your learning task in a way that includes a role, whenever possible, you will become grounded in the roles themselves and ensure that you are having opportunities to use the role in your practice. One last thing to consider is that some learning tasks will not include a foundational role. This may be due to the fact that the task is very straightforward, as in the example of reading an article and viewing a video to develop knowledge. In fact, many of the orientation and training-related learning tasks may not involve a role. It is when the student moves from orientation and training to practice that the roles become clearer.

Now that you have reviewed multilevel learning tasks and how to integrate the foundational roles of social work into a learning task, the last part of the learning objective is the plan for evaluation.

### The Plan for Evaluation

If you refer back to the guiding definition of a *learning objective*, you will recall a well-constructed learning objective also includes a plan for evaluation. It enables you and your field instructor to determine if the learning task was completed and the corresponding goal and objective met. A well-constructed learning objective includes information that identifies how the objective will be evaluated (the evaluation plan), which ultimately sets the stage for the final field evaluation process.

The evaluation plan includes information such as due dates, the number of times something is done, and the activities or resources used to measure an objective for learning and goals. Referring back to the sample learning objective, notice that several things are identified to assist in evaluating that learning objective. For instance, you and your field instructor can readily determine if a specific due date when something is to be completed was met and if an activity, such as discussing in supervision and applying content learned to a case, has been completed. Obviously, meeting a due date or completing an activity will not be the only standard by which an objective is evaluated, particularly in the context of the final field evaluation, but starting with a well-constructed objective will set the stage. The final field evaluation will most likely take place at the end of each semester or quarter and weighs heavily in the grade you receive for field. A well-constructed final evaluation will reflect the learning plan and relate directly to the goals and objectives you and your field instructor have set forth. The evaluation process should involve both you and your field instructor, along with any other critical players in the agency, in reviewing your progress and determining an overall evaluation of your performance. Make sure to conduct a self-assessment and be ready to discuss your assessment as well as hear your field instructor's assessment of your performance. If you have any concerns or questions about the outcome of your evaluation, discuss those with your field instructor first, as he or she may be able to resolve them. If that discussion does not sufficiently address your concerns, take them to your faculty field liaison or field director.

Table 3.1 offers a way to think about and practice developing learning objectives for field that integrate all of the areas discussed previously; namely, a goal statement, learning tasks with an integrated role, and a plan for evaluation.

**TABLE 3.1 ■ Developing Objectives for Learning**

Objective for Learning		
1. Goal Statement	2. Learning Task(s) (with an Integrated Role)	3. Plan for Evaluation
Sample Goal Statement:		

As you can see, an objective for learning consists of a goal statement, learning task(s), and a possible integrated role and plan for evaluation. This format is in keeping with Horejsi and Garthwait's (1999) definition of *learning objectives*, but instead of the objective being one multifaceted sentence, the objective for learning is broken down into three parts: (1) a goal statement, (2) learning task(s) with integrated role, and (3) plan for evaluation, which makes it easier to write and evaluate. Using Table 3.1, construct one sample objective for learning.

### REFLECTION QUESTION 3.1

Now that you have had a chance to review the elements of the learning plan, specifically focusing on goals and objectives, tasks and roles, and a plan for evaluation, the first thing to think about is what you are hoping to accomplish. In your answer, jot down goal statements. Next, consider expectations

for field as identified by your program, field instructor, and the agency. Then, start thinking about the kinds of multilevel tasks and roles you can engage in as well as those that you want to engage in. Last, identify ways in which your tasks, objectives, and goals can be evaluated.

### ROOM TO REFLECT

### Developing Your Learning Plan

In order to develop a well-constructed learning plan that includes all the information discussed thus far, complete Integrative Activity 3.3. This activity will give you all the necessary information to draft your program's learning plan as well as develop your skill in writing learning objectives.

## INTEGRATIVE ACTIVITY 3.3

### CONSTRUCTING THE FIELD LEARNING PLAN

**Purpose:** The purpose of this activity is to assist you in gathering the information you will need to complete your program's learning plan as well as to develop your skill in writing objectives for learning.

**Directions:** Referring back to Integrative Activities 3.1 and 3.2 and using the guideline set forth in Table 3.1, complete all areas.

**Competency 7:** Assess Individuals, Families, Groups, Organizations, and Communities

- develop mutually agreed-on intervention goals and objectives based on the critical assessment of strengths, needs, and challenges within clients and constituencies

#### 1. Primary role within agency: (Refer to Integrative Activity 3.2)

#### 2. Primary tasks: (Refer to Integrative Activities 3.1 and 3.2)

Micro Individuals:  Families:
Mezzo Groups: (Indicate Type/Treatment and/or Task)
Macro Organization:  Community: (Indicate Type of Community, Policy/Legislature, or Research)

**3. Identifying learning objectives:**

List all of the goals and objectives you are hoping to accomplish as a result of your field experience. To gather this list, consider the goals of the social worker(s) at the agency; your personal interests, goals, and objectives as a professional social worker; goals and objectives that relate to the population served or services offered; special projects or issues impacting the agency; and goals and objectives for field as outlined by your university field director, faculty field liaison, and course work.

In each of the five overarching areas of field competence (see Chapter 1), practice writing learning objectives, including multilevel learning tasks integrating the foundational roles of social work and the evaluation plan. Refer back to the list you developed above and link it to the five overarching goal areas.

**Goal Area 1:** Socialization and professional development as a social worker in field.

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

(Continued)

(Continued)

**Goal Area 2:** Ethical practice and consideration of diversity and social justice.

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

**Goal Area 3:** Integration of knowledge, values, and skills acquired in the classroom with the practice experiences of field

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

Do not copy, post, or distribute

**Goal Area 4:** Effective communication skills in field

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

**Goal Area 5:** Application of the planned change process with individuals, families, groups, organizations, and communities in field

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

(Continued)

(Continued)

**Other:** Competence specific to field site and program

Learning Objective:	Learning Tasks with Roles:	Evaluation Plan:

### Effective Use of the Learning Plan

As discussed at the beginning of this chapter, the learning plan provides direction and assists you in achieving what you hope to accomplish in field. You need to consider how to best use the document as a tool in your learning and development as a competent social worker. The first and most obvious use is to keep a copy of the learning plan and periodically review it on your own and in supervision with your field instructor. Students have asked me countless times for a copy of their learning plan so they and their field instructor could complete the final field evaluation. I am usually surprised and concerned that neither the student nor the field instructor had a copy to begin with, and I question their ability to have effectively monitored their progress in field without having referenced their learning plan. Second, if issues come up with regard to your tasks, such as being asked to engage in a task that is not on your learning plan or not having an opportunity to complete a task that is on the learning plan, use the learning plan as a way to resolve the issue. For instance, a student had a task on the learning plan that the student was not getting to complete because the student was spending too much time each day completing another task. By reviewing the learning plan and discussing the agreed-upon tasks with the field instructor and identifying the issue (the fact that the student wasn't getting to a particular task because the other task was taking up so much time), the student renegotiated the days at field. This renegotiation of the time spent on tasks allowed the student to have the time necessary to complete all the agreed-upon tasks. When you have your learning plan and refer to it, you often can avoid issues in the first place and more swiftly resolve an issue if one does come up. Last, use the learning plan to monitor your progress. This helps develop your confidence as you cross off tasks that you have accomplished and helps you refocus your time to complete those tasks that may have fallen through the cracks and have yet to be accomplished. Remember, the number of hours spent per week in field will seem like a lot at first, but once you are working, the time goes very quickly. So, it is important to stay on top of your time and use it in the most productive ways possible.

## The Pace of Learning

Once you have completed your official learning plan, it is helpful to consider how the learning plan can facilitate the pace of your learning. This refers to how quickly or slowly you move from orientation and training to independently practicing as a social work student. The learning plan should include tasks that reflect the pace, with some involving shadowing and cofacilitating to others reflecting independence. The first thing to discuss related to the pace of your learning is your transition from shadowing to independent practice.

### From Shadowing to Independent Practice

The transition you will make from shadowing to practicing independently as a social work student is similar to the steps involved in training (see Chapter 2), with an important step in your training plan being shadowing. However, how you move from that first day when you shadowed the social worker doing a home visit as part of your training to conducting home visits with your own cases as an independently practicing social work student is an important process to consider. There is no hard-and-fast rule; a lot of this process will be individualized to the style of your field instructor, the training process at your agency, the needs of your role, and your skill level as the student. However, you can do a few things to facilitate this transition.

First, make sure you have opportunities to shadow and observe many different social workers doing a variety of tasks and roles. Observing other social workers is an excellent learning experience for three reasons:

1. You are exposed to a lot of different styles of social workers.
2. You meet a variety of clients experiencing a variety of issues.
3. You begin to reflect on how you will handle a similar situation when you are practicing.

All of this becomes important as you move from shadowing to independent practice. As a part of your shadowing experience, make sure you can observe your field instructor providing various tasks and roles whenever possible. Observing your field instructor will give you a sense of who that person is as a social worker and an opportunity to see a more experienced worker. This contributes to your development and often helps you identify more targeted goals or markers of competent practice. For instance, a student observed the field instructor conducting intakes and, as a result, identified the skill level of the field instructor, specifically the instructor's ability to seamlessly engage the client and gather the needed information. The student noted that the style was very conversational. As a result, the student wanted to be able to do that. The ability of the student to target a skill as something they hoped to accomplish became very useful with regard to establishing the pace and steps involved in meeting that goal.

Next, begin to perform a task while under direct observation. As nerve-racking as this can be, it is an important part of the process. Year after year, at the end of field, students tell me they wish they had had more opportunities to be observed and to be given specific targeted feedback. To bridge this gap, I encourage you to do a few tasks under direct observation. The reason this is such a helpful task is because it is the best way to get feedback. Also, in terms of the learning process, you can engage in a task without having to know everything or be expected to handle every eventuality because your field instructor or agency designee is there with you. Once you get over the nervousness of working under direct observation, you will notice that it is actually comforting to have someone there completing the task with you.

The last step is to complete learning tasks independently. You have defined your role within the agency, been orientated and trained, and have clearly identified your learning tasks in the learning plan; now it is time to engage in those tasks independently. Let's discuss what this might look like. In most agencies, it will be very straightforward: You will be assigned a caseload, project, or task that you will complete independently. However, in some agencies, independent work will need to be defined and perhaps even negotiated. For instance, in some agencies, a

student cannot have official case assignment, meaning the student cannot be identified as the primary social worker on the case. However, it is necessary for a student to have some version of a caseload and independent role on the cases; so, even if the student cannot be the *official* case-worker, he or she can still learn the cases and work as independently as possible. Another way to think about independent practice as a social work student is to describe what something should not look like; for instance, a student who comes to field every day and is randomly assigned to workers, cases, and tasks, or a student comes to field each day and has to find work to do. Both situations can happen, and they tend to create a hectic learning environment that is not effective. How casework should actually look is as follows: The student is assigned certain cases to work and coworks those cases with the agency social worker. *Coworking* refers to the student and social worker working in tandem, with the student leading sessions or visits, asking questions to gather needed information, and completing any documentation, which is then reviewed and signed off on by the agency social worker. Another example is in the case of a student who is in an agency where official and legal reports are completed and presented. In this case, the student can work on the report and write a rough draft; based on that, the social worker completes the final version and presents it to the recipient (such as in a court hearing) with the student present. The primary goal of all field tasks, regardless of how the task has to be structured for a student, is to give the student a sense of continuity through case assignment and the ability to practice as independently as possible. Other students will be in a setting that easily translates to independent practice, thus the preceding situations will not be an issue. Either way, it is important that the learning plan reflect the plan for your eventual independent practice and that you discuss this process with your field instructor during the first few weeks of field.

As a final thought, it is interesting to note that macro-level tasks that target the organization—such as updating the resource manual, researching evidence-based practices, or developing a new program—lend themselves nicely to independent practice. Take, for example, a student who will be developing a new policy for the agency. Once the student and field instructor determine the plan for how best to approach this task (such as researching the policy need, identifying other agencies that have the policy, and finding resources that can assist in developing the policy), the student will have a great deal of control over completing this task independently.

### REFLECTION QUESTION 3.2

As you think about practicing independently, what does that look like in your agency? What are you excited about, and what are your concerns? What do you need

from yourself, your field instructor, and the field director or faculty field liaison to become independent at your field site?

### ROOM TO REFLECT

## Troubleshooting—Discussing the Pace of Learning

From time to time throughout your field experience, the pace of your learning may ebb and flow. This can be due to a number of variables and may require troubleshooting. During various points in the process of going from shadowing to independent practice, issues can arise, such as a student feeling that he or she is endlessly shadowing and not having opportunities to begin coworking; has no real opportunity for independent practice; or, conversely, is thrown into running a group the second week of field and has no idea what he or she is doing. Last, a student might be avoiding independent practice because the student is unsure about whether he or she can be effective.

All of the preceding situations can happen and, in fact, they are more common than not. So, it is important to discuss the pace of your learning in supervision. For some, this conversation will flow easily and naturally, but for others, it may be more difficult. This is one of the reasons why attending and using supervision is a professional socialization task, but sometimes it is not easy to develop this relationship and use it to discuss your learning process. Once again, this is where your learning plan can be an effective tool, but only if it clearly identifies the tasks that will assist you as you move from shadowing to independent practice.

If you are having issues with the pace of your learning, bring the learning plan to your field instructor and discuss your progress on various tasks. Also, your field director, faculty field liaison, and site visit can be effective resources to use to address any concerns you are having with regard to the pace of your learning. The bottom line is to ensure that you, the university, and the agency are all doing their part to create the best learning environment and experience possible.

## FREQUENTLY EXPERIENCED SITUATIONS

The following is a frequently experienced situation that relates well to this chapter. Review the situation and consider how you might go about handling this situation should it happen to you.

### **I'm not doing what I thought I would be doing; can I get a new placement?**

I'm so frustrated; I'm not doing any of the things I thought I would be doing. To make matters worse, my field instructor keeps asking me to do things that I don't think I should be doing. Can I get a different placement?

Although this was touched on in this chapter, this is a common experience that often requires specific attention. First and foremost, any time you have a question about the tasks you are or are not engaging in, you must discuss this openly and honestly with your field instructor.

In fact, whenever students or field instructors bring up issues about field, I ask each person if they have discussed the issue with the other party. I can't tell you how often I am told, "No." I always send each party

back to discuss the situation with the other. I realize that this may be easier said than done, so let's talk about discussing your concern about tasks with your field instructor.

First of all, you can refer to your learning plan. If the task you are not getting an opportunity to engage in is on the learning plan, you can refer to the learning plan and discuss how to incorporate that task into your days at field. If the task is not on your learning plan, you can say that you have several tasks already included on the plan, some of which you are having a hard time getting to, and that you won't be able to complete the requested task at this time. Tell your field instructor that you are open to discussing including the task, but you will have to drop another task due to the time constraints of the field placement.

Finally, the student's leap to wanting to switch placements is not so uncommon. My position with the students I work with has always been that the problems that come up while in field are often important learning opportunities. If a student switched placements every time there was an issue, (1) they would be constantly switching and (2) they would miss out on an

*(Continued)*

(Continued)

important learning opportunity to develop professional skills that will be necessary when practicing. Those skills include assertiveness, being one's own advocate, and professional communication. If a student is particularly nervous about discussing an issue with their field instructor, I encourage the student to write down

what he or she wants to say, practice with me or the other students, and fully prepare for the meeting.

If the problems do not get better, then you may need to discuss with your field director if the placement is appropriate. But this should be the last conversation to have, not the first.

## Suggested Field Tasks

- Identify your primary role and tasks.
- Review the social worker's job description.
- Identify other professionals with whom you work and learn about their roles.
- Identify learning opportunities and objectives.
- Develop a learning plan.
- Identify multilevel tasks to achieve the goals and objectives identified on your learning plan.
- Evaluate your progress in meeting the goals and objectives of field and core competencies and practice behaviors.
- Discuss the pace of learning.

## References

- Birkenmaier, J., & Berg-Weger, M. (2007). *The practicum companion for social work: Integrating class and field work*. Boston, MA: Pearson Education.
- Council on Social Work Education (CSWE). (2015). *Educational policy and accreditation standards*. Alexandria, VA: Author.
- DuBois, B., & Miley, K. (2005). *Social work: An empowering profession*. Boston, MA: Allyn and Bacon.
- Hendricks, C., Finch, J., & Franks, C. (2005). *Learning to teach, teaching to learn: A guide for social work field education*. Alexandria, VA: CSWE Press.
- Horejsi, C., & Garthwait, C. (1999). *The social work practicum: A guide and workbook for students*. Boston, MA: Allyn and Bacon.
- Interprofessional Education Collaborative. (2016). *Core competencies for interprofessional collaborative practice: 2016 update*. Washington, DC: Author.
- Kagel, J., & Kopels, S. (2008). *Social work records*. Long Grove, IL: Waveland Press.
- Kirst-Ashman, K., & Hull Jr., G. (2009). *Understanding generalist practice* (5th ed.). Belmont, CA: Brooks/Cole.
- Plionis, E., Bailey-Etta, B., & Manning, M. (2002). Implementing the generalist model in practice: Implications for curriculum and best practices. *Journal of Teaching in Social Work, 22*(3/4), 103–119.
- Riebschleger, J., & Grettenberger, S. (2006). Assessing graduating BSW field students' preparation for

generalist practice. *The Journal of Baccalaureate Social Work*, 12(1), 184.

Schaefer, J., & Larkin, S. (2015). Interprofessional education in undergraduate social work education. *The Journal of Baccalaureate Social Work*, 20(1), 179–188.

Sheafor, B., & Horejsi, C. (2008). *Techniques and guidelines for social work practice*. Boston, MA: Pearson Education.

Sheafor, B., & Horejsi, C. (2015). *Techniques and guidelines for social work practice*. Boston, MA: Pearson Education.

World Health Organization. (2010). *Framework for action on interprofessional education and collaborative practice*. Retrieved March 8, 2018, from [http://www.who.int/hrh/resources/framework\\_action/en](http://www.who.int/hrh/resources/framework_action/en)

Do not copy, post, or distribute