Best Practices for Field Instruction: Competency-Based Approaches to Achieving Professional Excellence

Located within the world’s finest public university and one of the most diverse regions in the nation, the School of Social Welfare strives to transform the systems that perpetuate poverty and disadvantage by:

• Developing effective leaders committed to solving complex social problems
• Conducting and utilizing research to improve social service delivery and policy
• Preparing the next generation of culturally competent social workers dedicated to serving the most vulnerable members of our society
YOUR PRIMARY RESOURCES
MULTI-LEVEL PRACTICE ACROSS THE ECOLOGICAL LEVELS

- Engage
- Assess
- Intervene
- Evaluate
- Transition

advanced concentration areas

- Methods
  - Management and Planning
- Settings
  - Community Mental Health
  - Health
- Age-Based Populations
  - Children and Families
  - Gerontology and Aging

ADVANCED CONCENTRATION AREAS

Practice
Research

Policy
Field

Concentration

Flexibility
Depth

Electives
THE THREE FUNDAMENTAL ROLES OF FIELD INSTRUCTOR

**Supporter**
Creates an environment that supports learning and growth, helps students feel understood, manage anxiety, take risks, negotiate challenges, and build professional confidence and identity.

**Teacher**
Identifies key learning goals and directly explains; creates related observational opportunities; designs rehearsal opportunities for student, observes their performance, and provides helpful and constructive feedback about strengths and ways to improve.

**Administrator**
Plans and organizes, assigns work, upholds quality standards, monitors and evaluates to standards, establishes due dates, addresses problems efficiently and directly, serves as gatekeeper.

FIELD INSTRUCTION BEST PRACTICES

- Offer, supportive, assessment-based, instructional relationship
- Clearly Identify competency outcomes, tasks, processes, and standards
- Provide direct instruction; design opportunities to observe, do and be observed doing practice
- Facilitate self-reflection and integration; provide honest feedback and competency-based evaluation
INSTRUCTIONAL RELATIONSHIP

- Planned, thoughtful orientation (3-4 weeks)
- Time for the student to understand day-to-day operations and all of the multi-level agency, community, and social/economic factors that shape service delivery
- Time to review of all relevant safety and risk reduction policies as well as client confidentiality and privacy policies
- Time to assess relevant knowledge, skills, and attitudes, hopes and fears, style of learning, and personal, temperamental, cultural, and/or identity related factors that may inform how they approach Time to make instructor’s expectations and approach to teaching
- Thoughtful map of learning for the year that is assessment based

CLEARLY IDENTIFIED COMPETENCY OUTCOMES

<table>
<thead>
<tr>
<th>1. Engagement with Individuals, Families, Groups, Organizations, and/or Communities</th>
<th>2. Consultation, Coordination, and Collaboration</th>
<th>3. Assessment of Individuals, Families, Groups, Organizations, and/or Communities</th>
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<tbody>
<tr>
<td>7. Evaluation of Systemic Efforts or Interventions</td>
<td>8. Planning for Transition and/or Termination</td>
<td>9. Written and Verbal Communication Skills</td>
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DEVELOPING A STELLAR LEARNING AGREEMENT

- Selection of tasks from the agency environment that match your working assessment of the student, promotes competency development and evaluation, and corresponds to agency-based opportunities.
- Describe the overarching nature of the setting and the student's primary learning goals.
- Key content areas include:
  - Orientation Activities
  - Case or Project-Based Assignments
  - Community, Agency, or System Improvement Project
  - Meeting Participation and/or Management
  - Participation in Field Instruction
  - Other (example: group work; cultural competence etc.)
- Attend ethically to task selection for students who are bilingual/bicultural or from underrepresented groups.

DIRECT INSTRUCTION AND OBSERVATIONAL OPPORTUNITIES

- Providing a verbal overview of key roles, skills, and knowledge domains.
- Watching you and other talented persons doing the tasks they will be responsible for.
- Reflecting upon what they observed.
- Selection of the right quality, complexity, and quantity of opportunities available within the agency to promote MSW level competencies.
- Setting the conditions for observation in advance and the expectation of risk-taking.
OBSERVATIONALLY-BASED FEEDBACK

- Observing a cross-section of student’s work
  - Observing an intake evaluation
  - Co-managing cases or projects
  - Co-leading groups or meetings
  - Observing participation in meetings, with other disciplines
  - Listening to 5-7 minute audio or video slices of student work
- Providing feedback in a timely manner
- Balancing appraisal of natural strengths with areas where improvement is desirable (magic ratio 3-4:1)
- Prioritizing the most important corrective feedback to give
- Providing behaviorally specific observations using descriptive, objective language
- Praising and recording progress and setting the next goal

COMMIT TO THE WEEKLY INSTRUCTIONAL HOUR

- Establish a regular, expected time
- Encourage the student to develop the agenda (and it is also a good idea to have your own)
- Pro-actively review administrative and orienting information
- Consult about problems, challenges, and successes
- Ask great questions that invite self-reflection and learning integration
- Share your practice wisdom as it applies
- Link to professional values, theories, and knowledge (e.g. what might your practice methods instructor say about this?)
- Provide support and encouragement and direct feedback
- Vary what you are doing as student grows more capable
- Evaluate how the weekly hour went and how it could be improved the following week
REFLECTION AND INTEGRATION

- Requires consistent weekly time to look at the big picture together beyond day-to-day procedures and tasks
- Involves wide-ranging discussions:
  - How was that for you?
  - What do you make of . . . ?
  - What cultural and diversity factors should we consider?
  - What concepts, theories, and principles have you learned at School that could apply here?
  - What did you learn in your courses this week?
  - What social work values and principles apply?
  - What are your ideas about how to proceed?
  - What skills do you think are involved here?
  - What support or information would you like?
  - What was the most helpful part of today’s instruction? How could I help you more?

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| 7. Evaluation of Systemic Efforts or Interventions | 8. Planning for Transition and/or Termination | 9. Written and Verbal Communication Skills |
COMPETENCY BASED SUMMATIVE EVALUATION

Assessment of Individuals, Families, Groups, Organizations, and/or Communities:
Collects, analyzes, and applies relevant information to promote the effective delivery of clinical services and/or execution of administrative and planning projects.

<table>
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<tr>
<th>Improvement Needed</th>
<th>Competence</th>
<th>Mastery</th>
</tr>
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<tbody>
<tr>
<td>✔️ Unable to collect essential information</td>
<td>Collects most of the relevant information</td>
<td>Consistently collects the most relevant information</td>
</tr>
<tr>
<td>✔️ Overlooks biological, developmental, psychological, social, cultural, community, and/or spiritual factors</td>
<td>Considers factors on multiple levels including biological, developmental, psychological, social, cultural, community, and spiritual factors</td>
<td>Selects the most critical factors on biological, developmental, psychological, social, cultural, community, and spiritual levels</td>
</tr>
<tr>
<td>✔️ Ignores or undervalues client system’s experience of diversity including poverty, oppression, and discrimination</td>
<td>Considers some diversity factors including poverty, oppression, and discrimination</td>
<td>Thoughtfully considers the most relevant diversity factors including subtle factors like micro-aggression</td>
</tr>
<tr>
<td>✔️ Unable to balance strength and needs</td>
<td>Balances appraisal of strengths and needs in most instances</td>
<td>Consistently balances strengths and needs</td>
</tr>
<tr>
<td>✔️ Fails to organize and analyze information</td>
<td>Organizes and analyzes information sufficiently</td>
<td>Efficiently organizes, analyzes, and condenses information</td>
</tr>
<tr>
<td>✔️ Draws spurious or inaccurate conclusions</td>
<td>Draws conclusions that are mostly well-founded and well-supported</td>
<td>Draws accurate conclusions and applies understanding in a creative manner</td>
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Provide your global rating on each competency

Considering the above items (i.e. the components) and other relevant factors, how would you rate the student’s overall level of competence related to assessment?

1.1 2 3 4 5 Unable to Assess

Not Competent Competent Exceptional Mastery

Assign a number to the nearest .50 increment
YOUR COMMENTS MATTER

- Please provide comments in the comment boxes that include specific, observable behaviors the student has demonstrated to you that indicate competency development

**Student strengths or accomplishments:** Jane demonstrated excellent capacity to engage the children she was assigned to assess. She demonstrate persistence and creativity, seeming able to connect with children that even experienced providers had difficulty getting to talk. She was able to elicit quite a bit of speech from a client who was selectively mute in part because of her improved comfort with silence.

**Specific ways student could enhance or improve competency in this area:** Although parents reported that their children were extremely fond of and positively impacted by Jane, she appears to heavily prefer working with children to their parents. Over the year I did see her improve her ability to engage the parents and natural supports of the child but would encourage continued enhancement in her engagement skills with adults and other meso-systems that critically shape children’s lives and development.

OVERALL GRADE RECOMMENDATION

<table>
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<th>FIELD INSTRUCTOR’S GRADE RECOMMENDATION</th>
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<tr>
<td>Note: If you are uncertain about which grade to recommend, please check the “Request for Consultation” box and your assigned field consultant will contact you.</td>
</tr>
<tr>
<td>☐ SATISFACTORY</td>
</tr>
<tr>
<td>☐ UNSATISFACTORY</td>
</tr>
<tr>
<td>☐ REQUEST FOR CONSULTATION</td>
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GATEKEEPING IS A CRITICAL FUNCTION

- Most Common Problems
  - Inability to consistently attend and be physically, cognitively, and emotionally present for agency-based learning tasks
  - Difficulty engaging others and forming the range of relationships needed to succeed
  - Poor judgment and boundaries related to communication and interpersonal relationships
  - Lacks capacity and/or willingness to respond to feedback within an agreed-upon timeline

THREE THINGS TO REMEMBER

There are three things to remember when teaching:

1. Know your stuff,
2. Know whom you are stuffing, and
3. Stuff them elegantly.

--Lola May
CONCRETELY SUMMARIZED

- Provide your student with at least a three-week orientation to your agency environment and practice context
  - Attend to intern safety by reviewing protective protocols and selecting cases and projects thoughtfully
  - Provide your student with opportunities to observe competent others performing tasks they are learning
- Select educational activities that match your assessment of the student and your practice context
- Spend a dedicated hour with your student each week
- Provide timely, specific, honest, clear, and thoughtful feedback that balances supporting student strengths and challenging them to grow
- Consult and confer throughout

THIS IS WHAT IT FEELS LIKE
WANT TO KEEP LEARNING?

15-hour CEU Course on Advanced Field Instruction and Clinical Supervision

Thursday, October 22, 2015
Thursday, October 29, 2015

To pre-register, please email swfield@berkeley.edu

THANK YOU, LIFELONG MEDICAL CARE AND GILLIAN FYNN, LCSW

2015 Field Agency and Field Instructor of the Year