UTILIZATION OF MANPOWER IN A PUBLIC WELFARE SETTING

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ABSTRACT

This study is concerned with the social work man-power problem
as it exists in the social assistance sector of the public Welfare field.
The purpose of the study was to determine if a rational plan for the de-
ployment of social work personnel could be devised that would result in
more effective and appropriate utilization of social work staff with
varying levels of training and competence.

The project is an exploratory study based on Richan's suggest-
ion that a plan for worker deployment can be more effectively developed
by first determining the degree of organizational or professional con-
trols present or required in the performance of the various tasks in a
public welfare agency.

A list of tasks performed in the issuance of social allowance
from initial contact through to termination was drawn up by the research-
ers on the basis of their knowledge and combined twenty-two years experi-
ence in this area. This list of one hundred twenty-eight tasks was
presented in the form of a questionnaire to seven experienced social
workers carrying urban and rural caseloads in three public welfare offices.
The workers were asked to determine over a two week period, by noting
their daily activities, if the list was accurate, complete and unambig-
uous.

This validated list of tasks was presented to a panel of four-
teen judges holding Master of Social Work degrees and at least two years'
experience in the public welfare field for rating. The rating proced-
ures were based on a five point scale of autonomy of worker functioning
required in the performance of the different tasks.

Beck's definition of worker autonomy was accepted as appropriate
for the purposes of this study as it incorporates the explicitness of
guides to the workers, the visibility of worker activity and the degree of
required organizational support for social work standards.

This method of data collection, the use of the questionnaire and
the rating scale, was considered the most feasible as they were easy to
administer, flexible, allowed for fine definition with a specific frame of
reference, inexpensive financially and in terms of worker-judge-researcher
time.

An analysis of our study findings revealed that only 9 per cent
of the listed tasks received 80 per cent of judge rating agreement that
was necessary to establish its reliability of the ratings. It was sig-
nificant, however, that the judges' ratings usually followed a pattern
tending to cluster at two adjacent ratings.

While it is obvious that the instrument is not yet reliable,
the fact that 42 per cent of the tasks received over 60 per cent agreement
is encouraging and leads the researchers to conclude that the study is
going in the right direction.

It was also tentatively concluded that the closeness of the ratings seemed to indicate either that the rating scale of autonomy was not fine enough to allow distinctions between adjacent ratings or that the tasks were not defined with sufficient clarity for the judges to make distinctions regarding the amount of autonomy required in the performance of the task.

The judges were queried on the problems they encountered in their ratings and their remarks led the researchers to re-examine the definitions of the tasks, and although they had been validated by the field workers in the initial phase of the study, it became evident that definitions of a great number of tasks could be unclear or confusing when they were rated by the employment of the autonomy criterion. This re-examination led the researchers to revise all tasks receiving less than 80 per cent agreement.

It is concluded that there is no indication that the criterion of autonomy should be rejected. Rather, if the revised list of tasks can be given to judges to rate again, it is felt that a much higher degree of reliability can be established. Should the new ratings prove to be reliable, the way will then be clear to develop a task assignment scheme to be employed in a field study.

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CHAPTER I

INTRODUCTION

The Scope and Importance of the Problem

The utilization of manpower is a problem presently causing

concern in all fields of social welfare--in public assistance, family

and children's services, medical and psychiatric services, and the field

of corrections.   Both from the literature and from actual experience, it

soon becomes evident that caseloads are too heavy and too general to allow

workers to provide full services on a selective basis according to need.

Indeed, due to the severe lack of professional personnel, we find numerous

agencies using unqualified workers to provide a whole range of services

including those, such as marital counselling and adoptions, which were trad-

itionally the preserve of the highly skilled professional worker.

Our interest is limited specifically to the field of public

welfare.   While the particular tasks in this area of social work are to

establish eligibility for financial assistance and other forms of material

aid, public welfare also has the function of rehabilitation and, hopefully,

prevention of further social dysfunction.   Due to the fact that the public

welfare worker is often the first and perhaps the only resource, an

individual or a family has, not only with matters of a material nature, but

also with more general social dysfunctioning, we feel that the importance of

improving the quality and quantity of service offered the client is of the

utmost importance.   Furthermore, since many public welfare workers have not

completed or even begun their professional education and are often required

to attempt to deal with problems far beyond their capabilities, a simple

utilitarian scheme for assignment of social work tasks would provide a better

measure of protection to the client.   Often the client is too vulnerable to

withstand the unskilled worker's tampering. However, as many public welfare clients come with a specific and recognizable material need, but, require little or no other help, it would seem there is definitely a place for the non-professional in public welfare. A classification scheme for social work tasks and an appropriate scheme for assignment of tasks to workers would thus free the professional worker to provide more intensive and skilled forms of treatment and allow the client to receive help more quickly and at the same time, help more appropriate to his needs.

Current Practices

Until recently, the Department of Social Welfare [1] made little attempt to classify tasks or to devise a scheme for maximizing use of staff. Professional and non-professional workers handled the same cases with a resulting inability and lack of opportunity to provide comprehensive service to meet client needs. Large caseloads and the heavy demands of the legal aspects of determining eligibility for financial assistance left the workers little time either for establishing need for casework treatment or for carrying it out when this was indicated.

An attempt to correct the situation was made two years ago with the introduction of "caseload streaming"--that is, assigning priority cases to special workers who were to give more intensive service. The criteria for establishing priority has been based on the individual worker's belief that the case required some form of special attention. Unfortunately, these decisions are often made by non-professional workers who do not possess diagnostic training or skill. Therefore, cases requiring intensive treatment are sometimes overlooked and buried in "administrative caseloads" while other cases are referred through for intensive treatment when no need for it

1   Within this chapter, the Department of Social Welfare specifically
     referred to is that of the Province of British Columbia.

exists.   This lack of an adequate scheme for task assignment, the shortage

of professional workers to handle the intensive treatment caseloads, and

the failure of the Department of Social Welfare to reduce caseloads for

either the professional or non-professional worker to manageable proportions

has not led to encouraging results in this program to date.   Caseloads

range from as high as 60 highly active, intensive care cases for the prof-

essional, to as high as 200 cases for the administrative worker.

One of the thesis members handling a caseload of 180 social

assistance cases, during the summer of 1966, kept a diary for ten days of

his daily activities.   It is readily discernible that the major portion of

time was spent handling administrative details (recording, filing, issuing

ancillary medical services and so forth) and in establishing eligibility.

It is significant that time was available for only two interviews of a more

intensive nature.   Thus, we must consider whether it is actually a streaming

of cases about which we are concerned, or more likely, the streaming of tasks

performed in relation to any specific case.

We should like to discuss one other effort to maximize staff

deployment.   Some municipalities, have tried to separate administrative

detail from casework practice.   To our knowledge, no attempt has yet been

made to determine the importance of administrative tasks to the building

casework relationships.   Our belief is that this system is inoperable due

to this factor as it has led to what should be casework decisions being

made by administrative personnel on an administratile basis.

Unfortunately, no public welfare agency in this province has yet

tried to implement a scheme utilizing welfare aides in the capacity of aides,

although some have been hired by Vancouver City Social Service as full social

workers.   Thus, no really effective attempt has been made to utilize staff

to maximum potentials.

Decisions Needing to be Made

As indicated above, we feel that rather than use classifications of cases, we should concentrate more on individual tasks. In addition to providing a classification of cases, such an approach would allow some division of tasks on individual cases.

Consequently our first step will be to collect and define specific tasks performed by social workers in the public assistance field. In order to classify these tasks, we shall have to fulfill the following conditions: define each task; Identify criteria by which the tasks may be differentiated; Select a panel of judges to rate the tasks; Establish criteria for acceptance of their ratings;

In a later study utilizing a scheme for assigning tasks it would be necessary to determine:

(1) The relationship of administrative tasks to the casework relationship. Is there any harm to a casework relationship in separating the administrative tasks.

(2) The basis for assessing levels of worker capability (or professionalism).

A classification of tasks will allow us to draw some conclusions as to the utilization of welfare aides in public welfare and, hopefully, will lead future researchers to the development of a model structure of task assignment and personnel deployment. The operation of such a model could then provide a measure of validity of the criteria. However, validity will be difficult to determine.

The matter of adequate controls on caseload weighting is another matter that warrants concern and future investigation. To be truly effective in their work, social workers must have caseloads that are of appropriate size. "Appropriate size" has not yet been satisfactorily determined. We wish to emphasize our belief that this study and others must be focussed on

improving the quality of service to the client and not merely on serving administrative expediency.

Persons Connected With the Project

Sponsor

This project is being sponsored by the Department of Social Welfare, Province of British Columbia (D.S.W.). In addition to providing financial assistance, the Department was instrumental in making the nine workers in the three field offices available to us during a portion of the study. During a two week period these workers will be asked to review the list of tasks performed in the issuance of social allowance for the purpose of ensuring clarity and applicability of each task listed. Any task performed by the workers during this period but not included in the list will be noted and incorporated into the final list submitted to the judges for rating. The workers will be asked to indicate each time any task is in fact performed. A full report will be given to the Department of Social Welfare in the form of the completed thesis.

The Department of Social Welfare has a special interest in this project as it relates directly to their own "Project 66"-- a comprehensive experimental program on manpower. The Department is also interested because it is the primary agency directly providing public welfare services through-out the province. The present study may provide direction to the Department in terms of problems, needs, and possible solutions.

No specific direction has been given to the reasearchers by the sponsor. Although responsive to our efforts, and in agreement with our goal of maximizing the use of trained staff, the Department is not committed to act upon any study findings or recommendations.

It must be pointed out that the Department or Social Welfare suffers from an acute shortage of personnel holding Bachelor and Master of Social Work

Degrees and does not, at this time, employ welfare aides.   While this
presents particular problems in constructing a field experiment, it will
not seriously affect the objective of this study to develop an instrument
for task assignment.

Potential Consumers

Other persons with an interest include: researchers doing similar
studies, training institutions for welfare aides, the professional association
of social workers (particularly with reference to licencing of social
workers).

The Researchers

The researchers are four students in their final year of the
Masters of Social Work program at the University of British Columbia, School
of Social Work.   They have a total of 22 years experience in public welfare
and will continue to practice in the public welfare sector of the social
work profession.

In addition to their own interests in public welfare and their deep
commitment to providing the best, most efficient, and most productive service
to clients, they also have an interest in preparing a thesis for completion
of their Masters of Social Work program.   This additional aspect should not
colour or affect the study in any way.

Organization of the Research Report

Having delineated the problem to which this project addresses
itself, it now becomes necessary to employ and describe the various research
skills, techniques and methodology involved in determining whether or not
tasks performed in a social assistance agency can be collected, identified
and rated.   A model can then be developed that relates social worker train-
ing with the nature of the tasks performed in order that social work personnel
may be more efficiently and rationally deployed.

The first step will be to examine the literature to determine what is known and what has been attempted in the identified problem area and to discover useful and significant techniques and concepts already developed by other researchers, applicable to this area of study. The second step will be to construct the theoretical framework of the study. This will involve a discussion and description of the assumptions, the level of research design, the sampling procedures and the data collection methods involved in the study. The third step will involve a discussion of the nature of the study findings--the problems encountered and suggestions for possible modifications in research procedures that were employed. A final step will involve presenting a summary of the project, conclusions arrived at, and recommendations for future research.

CHAPTER II

REVIEW OF THE LITERATURE

Within this chapter, it will be our purpose to review the

existing literature on the use of personnel in social work settings. As

the problem of staff shortage becomes increasingly apparent, many agencies

and a few research groups have undertaken small scale projects, some of

which are experimental, in an attempt to achieve maximum benefit to the

client from existing social work personnel.   Some writers, on the basis

of an impressionistic analysis of existing conditions, or, on the basis of

actual experimental research have proposed "ideal" models of staff use.

In this chapter, many of these studies will be looked at and

specific reference will be made to: (a) criteria employed for classifying

social work tasks   (b) social work staff classification schemes   (c) work

assignment schemes   (d) methods of evaluating criteria   (e) methods of train-

ing personnel.

Criteria For Classifying Tasks

Within this section we are presenting varied criteria, suggested

in the literature, for the purpose of classifying social work tasks.

Worker Autonomy and Task Complexity

A study was undertaken by the N.A.S.W. in 1964 (37), utilizing the

concepts of worker autonomy and complexity of task.   It was their purpose

to identify, independent from the client or groups of clients, the nature

of the tasks (levels of tasks) performed by social workers.

Worker Autonomy

According to Beck (26), social work has both organizational and

professional controls.   The greater the need for professional control, the

greater the need for professional education.   Inherent in the concept are

the following:

(a) Explicit guides to workers. Rules and
regulations can lead to efficiency but many
social work jobs are not spelled out in a
book of regulations.

(b) Visibility of practice. Casework is almost
invariably classed to direct observation.

(c) Organizational support for social work standards
--the degree to which the worker practices in a
setting in which there is understanding support
for social work principles.

Autonomy seems a workable concept in that it should be "relatively"

easy to define and to determine in certain tasks, the degrees of controls

present. It is useful for making relative but not absolute judgements.(26)

This may be considered a limitation of most of the criteria that will be out-

lined, however, using an ordinal scale it is usually sufficient for work

purposes.

Task Complexity

We were unable to locate a definition of "task complexity". In

the N.A.S.W. study, 1964, (37) the term was apparently considered "sufficient-

ly descriptive". Mary Baker suggests three types of complexity: (1) the

constellation of services required by the whole service function of the

agency, i.e., the location of resources, (2) the type of service required

rather than the psychopathology, (3) the complexity of service required.(25)

We are assuming that in the N.A.S.W. study, the term "task complexity" refers

to the degree of knowledge in the various social work methods required in

carrying out the task as opposed to the "technical" or specific knowledge

required in providing a direct and concrete service, for example, knowledge

of resources.

Worker Autonomy and Client Vulnerability

Several of the studies (37, 22, 14) reviewed used the criteria of

worker autonomy and client vulnerability for classifying tasks in order to develop a means of sorting job responsibilities into two categories--those that might better be done by the fully trained and those that might be adequately done by the less than fully trained and still maintain a certain acceptable standard.(26)   The concept of worker autonomy has already been discussed on the previous page.

    Client Vulnerability

        According to Beck, client vulnerability means the degree to which the client is vulnerable to harm resulting from the fact that the social worker may not have "built-in" social work values, knowledge, attitudes and skills.   Client vulnerability can be determined by the nature of the client's own situation or problem and the nature of the service being offered.

        The Medical Social Workers Professional Components Study to see which tasks could be delegated to non-professional personnel would also seem to be taking the client into consideration when tasks are defined.   The foci of this study are: (a) the nature of the "stuff" to be worked with, (b) the nature of the changes to be brought about, (c) the consequences of inadequate worker performance (26).

        The concept of client vulnerability, perhaps more than some, appears to specifically concern itself with client need.   It was suggested in the N.A.S.W. study, 1964, (37) however, that when it is worker tasks which are being rated and classified, client vulnerability is not applicable as a criterion, although it may be a useful concept if the approach is the client and not the worker's activities.   Once the tasks for the various levels of staff are identified, the concept has potential use in determining which clients need the help of the most skilled workers.   It was further suggested that this concept would be basically helpful in obtaining a more complete understanding of the different values held in the profession and the

implications which these differences have for worker actions with the client.

Fact Finding and Decision Making

Several articles (5, 8, 21, 23, 25, 27, 31) infer the use of the criteria of fact finding (investigation) and decision making (service and treatment) for classifying tasks. In practice it is recognized that these tasks are, in fact, mutually dependent. These studies suggest that attention should be given to the separation of "technical" tasks (investigation) and "social work" tasks (decision making).

Fact Finding

Fact finding as a criterion apparently includes the obtaining and providing of specifically defined information and resources and, often, according to the strict interpretation of rules. Some writers feel that the tasks should be classified on the basis of client problem or need, others, on worker function or skill.

Mary Baker (25) suggest that it should be possible to define those specific tasks or situations where need is obvious and straightforward (of a material nature). This could include the gathering of facts, applying of explicit criteria to the facts, planning action where patterns are unambiguous and involve no special risk. This would appear to be the distinguishing factor of fact finding tasks. In the Minnesota Department of Public Welfare Project (23) it is suggested that in fact gathering, the emphasis is on task; in decision making, it is on the client or the case.

Decision Making

Decision making implies the ability and/or necessity for making independent judgments with regard to clients and situations. It has been compared by Margaret Heyman (10), to the criteria of "worker autonomy" which has already been discussed. According to Mary Baker, (25) decision making involves those tasks and cases demanding "unique designs" based upon

professional judgment, situations where application of criteria yield
ambiguous results and <u>risk is involved</u>.   Action is based on client needs.
Again it appears that the risk involved is the deciding factor.   Dumpson
and Podell (27) define service as primarily oriented to the juxtaposition of
client needs and resources.   Treatment implies the determining and meeting
of client need and/or enabling the client to understand and change his needs.

Mary Baker asks whether or not the dynamics of clients and situations
can be adequately classified.   It is possible that these criteria could be
universally applied in any setting and in most social work situations.   We
were unable, however, to find any instances of where the criteria were, in
fact, operationally defined.   Interestingly enough, there is an experimental
study which was initiated in 1963 under the joint auspices of the New York
City Department of Welfare and the School of Social Work at Columbia Univer-
sity dealing with decentralization of decision making.   Their findings may
eventually prove of interest.(24)

Client Need

The theme of using client need as a criterion is also found
scattered throughout the literature.   It would appear that few studies
actually operationally define their terms.   Weissman and Baker, (35) using
the critical incident technique have tabulated a range of client problems
which need to be met through the activities of the worker.   The services
provided are classed as preventive, protective, or rehabilitative.   Meyer
(31) suggests that the criteria often have been defined "ideologically" in
terms of accessibility to certain treatment approaches rather than in terms
of needs to be met through an array of approaches.

The use of the criteria of client need, leading ultimately to a
workable treatment classification appear to be a suitable and fundamental way
of attacking the problem under study.   Long term evaluative research, using

this criterion would probably yield most useful results.

Social Work Staff Classification Schemes

A classification plan is an orderly arrangement of jobs requiring similar duties, responsibilities, knowledge and skills in each position and class.

> "A position, which may be either occupied or vacant must be clearly differentiated from the incumbent of the positions. It is characterized by certain duties and responsibilities, which call for the time and attention of some one individual.... A position involves certain specified duties and responsibilities, and to it is assigned a distinguishing and perhaps conventional title."

> "A class is a group of positions sufficiently alike in respect to their duties and responsibilities to justify common treatment in selection, compensation and other employment processes, and sufficiently different from positions of other classes to justify different treatment in one or more of these respects ....In other words, the same characteristic qualifications, duties and responsibilities are required, and the same scale of compensation can be applied with equity in each class." (40, p.5-7)

More specifically, the factors looked at when drawing up a job classification are: the complexity and relative difficulty of duties; the availability and nature of guidelines and supervision; the degree of independent judgment and original thinking required; the number and level of positions supervised; staff training and development; purpose and nature of personal relations; education and diversification of knowledge, experience and skills required. (40, p.7)

In the literature, we find the following titles given to distinguish various positions, classes or levels of staff in social welfare settings: the professional, the leader, the social work student, the casework assistant, the non-professional, the sub-professional, the in-service trained, the specialist, the technical person, the case aide, the indigenous worker, the volunteer, the clerical staff. What follows is an attempt to incorporate

the material on staff classification in the literature, into four main classes, the professional, the non-professional, the volunteer and clerical staff.

Professional Staff

In the article "Personnel in Social Work," in the Encyclopedia of Social Work (1965), it is suggested that ideally the aim should be to establish professional social workers at all levels. It is generally accepted, however, as both necessary and satisfactory to attempt "planned deployment of personnel at different levels of professional responsibility." (38, p.532) Meyer (32) goes so far as to suggest that the professional organization proves a hindrance to effective manpower utilization because of (a) its inability or unwillingness to adapt to new service needs, (b) its devotion to false criteria of what important tasks are, (c) the valuing of private over public services, psychological over social approaches.

There is general agreement in the literature as to the definition of a professional social worker. He is the professionally trained, fully qualified individual--and M.S.W. (or equivalent) with experience. Meyer (32) suggests that accreditation by an association is also a requirement. It is also generally accepted that the professional should be used exclusively at the highest level of skill in order to provide a high degree of service.

Richan (14) suggests that the professional would become involved when there is a high degree of client vulnerability and worker autonomy. Margaret Heyman (9) suggests that the professional handles cases requiring advanced casework skills. Apparently these include cases where:

   (1) independent on the spot casework treatment due to
        the nature of the emotional disturbance in the
        situation is required.

   (2) independent on the spot casework judgment is
        essential to secure the recommended vital
        (medical) treatment.

(3) there are serious administrative implications related to public relations, administrative expediency or educational purposes.

Further to this Meyer (32) suggests that the professional will assume responsibility for organizing services, for example, preventative programs, and assume a role as community change agent, facilitating changes in the community. We might add to this list, supervision--an educational device and to a certain extent, a form of external control on the less experienced. It would appear that the "Integrative Function" as suggested in the N.A.S.W. study, 1964 (37) would be that performed by the professional worker.

Non-Professional Staff

In broadest terms, non-professionals may be thought of as social work personnel who are not professionally or fully qualified. There are, however, many categories of non-professional staff differing in education and training and in the expectations placed on them in the job situation. Beck (26) suggests that there are two main conceptions of the role of the non-professional in social work: (1) a specialized role and program specific function, (2) a broader role drawing on many skills employed by the pro-fessional social worker but on a less intensive level and carrying less crucial responsibility.

The Sub-Professional

The literature makes reference to those individuals who have some in-service or post graduate training but have not yet obtained an M.S.W. or equivalent. Richan (14) calls them sub-professionals who perform the same kinds of tasks as the professional but with less vulnerable clients.[1] It is possible that Margaret Heyman (9) in her suggested staff classification, meant that the following types of cases could be handled by the sub-

1 The literature suggests that the social work student can be "absorbed" into the structure, presumably in this category of sub-professionals.

professional:

    (1) Cases with presenting diagnostic considerations:

        (a) obvious ambivalence to, resistance to, or
             rejection of (medical) recommendations.

        (b) obvious hostility towards or anxiety about
             the diagnosis, treatment and hospitalization;
             an unusual degree of defensiveness in the
             behavior of the patient or relatives;
             inappropriate reaction to the illness.

        (c) disturbance of the individual and/or
             relative (family) relationships.

        (d) personality attributes of the patient or
             relative, for example, dependency,
             insecurity.

    (2) Cases where there is anticipated co-operative
        activity with other agencies or professionals.

In a sense, the function of the sub-professional may be seen to correspond

to the "Supportive Function" referred to in the study by the N.A.S.W., 1964

(37).

The Specialist

      The term social work specialist is used by Richan.(14) By this

term he means individuals whose education is technical and geared to specific

skills and knowledge. These specialists may or may not have full profess-

ional training. Richan sees this position as being a career in itself and

not a stepping stone to the professional level. The specialist's tasks

are often ones which can be routinized and controlled externally without

detracting from the service and he may work with highly vulnerable clients.

In the U.S. Department of Health, Education and Welfare publication dated

December 1965, "Utilization of Social Work Staff With Different Levels of

Education", an outline is given for the use of such specialists--for protec-

tion, legal services, home economics, and medical problems.

The Case Aide

The term case aide is used here to refer to those individuals,
probably without any under-graduate university training in social work,
who have received brief courses orienting them to the field of social work.
(14) This is different from Epstein's position of casework assistant which
is filled by individuals who are "college graduates with experience in making
decision on human problems". (5) Richan (14) suggests that the case aide
(welfare aide) has only limited responsibilities and works in conjunction
with a more fully trained staff member and with the least vulnerable
clientele. Heyman (10) suggests that the case aide can handle discharge
planning, information indicated via school attendance forms, help with
securing appliances, housing and the like, applications for convalescent
care, courtesy and explanatory services, finding nursing home vacancies and
information gathering from collaterals. The "Facilitative Function" and
even perhaps the "Maintenance Function" suggested by the N.A.S.W. study, 1964
(37) may be considered functions of the case aide.

In an article by Brager (3) it has been suggested that low income
persons can establish and maintain communication with slum residents easily
and more effectively than professionals. In some places, low income persons,
of stable background, are being employed in the social services, but not in
roles requiring a relatively high degree of autonomy. The indigenous work-
ers must have some expertise in the agency programs, must identify with
their own cultural group and must be action oriented. It is further
suggested, in this article, that the indigenous worker not become "profession-
alized"--but rather continue to remain as himself. Indigenous workers are
assigned a wide range of tasks and freedom in carrying them out. They can
give advice, process complaints, make referrals, offer support and perform
concrete tasks.

The Volunteer

Laura Epstein, in writing on the use of personnel in a Travellers Aid Society, (5) suggests that volunteers can provide information services, meet and place, under staff supervision travellers for whom the agency has agreed to provide a service, perform travel or transportation procedural duties and act as desk receptionists.

The Clerical Staff

Finestone and Heyman (10, 28) suggest the shifting of many administrative tasks to clerical personnel. Heyman specifically suggests the making of appointments, information gathering from community resources or vendors, courtesy and explanation services within department offices as being appropriate clerical tasks. The Experimental Welfare Centre Project (24) has engineered a pilot project, "The Reallocation of Clerical Tasks," which may provide useful data at a future date.

Models

Dumpson and Podell (27) have outlined a study which proposes several theoretical combinations of (a) type of service provided and (b) composition of workers in the unit providing the service. It is based on the assumption that trained personnel can handle supervisory positions, consultant weilding no authority positions, direct service to client positions and intake. The staff would then be arranged in "case teams"--one investigatory worker and one service or treatment worker.

Mary Baker (25) suggests an interesting scheme.

(1) Workers with three months specific in service training for a particular agency job to handle standardized services such as gathering facts, applying explicit criteria to the facts. (The "X" worker in a more limited role.)

(2) C.S.W.E. "X" worker holding undergraduate degree and six months academic training comparable to that of a school of social work and supervised experience.

(3) C.S.W.E. "Y" worker--a fully qualified professional
     person with an M.S.W. or equivalent and experience.
     Professional judgment required.

Schemes of Work Assignment

Case streaming appears to be advantageous where there are a

considerable number of workers with full professional training. As yet

it has limited application to public welfare in British Columbia.

The team approach differs slightly from the streaming program in

that the professional social workers and non-professional workers are

formed into a team for the purpose of providing services. The team, as

outlined by Gil (7), can consist of any number of levels of service although

the team leader should be a professionally educated social worker. The

feature of the team plan that differentiates it from the streaming approach

is that the team has joint reponsibility for a caseload. The team caseload

will, therefore, be larger than the individual caseloads and can be used

easily in multi-function agencies or within small geographic areas.

The members of the team are considered total participants in the

service to the client group rather than as specialists for specific tasks.

The size of the team can be adjusted and will depend on such factors as type

of service the agency offers, availability of staff, particularly skilled

team leaders, and administrative structure of the agency.

A further function is the adaptability of the team approach to the

neighbourhood based services where local residents could be absorbed into

the team and thus strengthen their roots in the neighbourhood. It can be

seen that social teams can be adapted to different social welfare settings

and where client needs consist of a broad spectrum of situations that can

be served by personnel of different levels of training.

Usefulness of Teams

There is a possibility that personnel who are employed in the same

agency, offering the same services but on different levels may be somewhat dissatisfied with their own role. Gil (7), points out that team members will derive a stronger sense of satisfaction from their jobs and that they will become more identified with the job and the agency when they are involved in the whole job rather than in unrelated parts of it. They will gain a further sense of satisfaction in the overall work performance of the entire team.

The team approach is a natural cohesive group to employ the new concept of group supervision. Although Gil states there is the increasing emphasis on independence of the social worker from his supervisor, until this is an actually accepted medium, then group supervision will be more efficient and may be more effective.

It is frequently reported that professional social workers, if attracted, do not remain long in the fields of Public Welfare. There are many reasons for this, two being often caseloads that are too high and salaries that are too low. While still allowing for more clients to be reached per professional and without reducing the quality of service, the use of the team approach may ultimately reduce the number of professional social workers required in the field of Public Welfare. If through the use of teams, the cost per case is reduced perhaps more money could be allocated to pay the fully trained worker a wage more comparable to that which he would receive in a private agency.

Limitations of the Team Approach

The agency structure is often based on the need to give service and intake cannot be controlled. Clients cannot be chosen, they must be accepted for service because of statutory requirements. The difficulty in administrative reorganization in public welfare requires not only convincing departmental administration but also the politicians, of the soundness in a

new approach. Furthermore, the team approach is new to professional social workers in some settings and although it may be workable, it may take time to be accepted. Continuity of team leadership is essential to provision of a minimally adequate level of service.

Method of Evaluation

According to Polansky, reliability refers to "a cluster of concepts relating to the precision, reproducibility or stability of a set of measures". In a broad sense the validity or relevance of a measurement procedure is based on the degree to which the aims or purposes of making the measurements, are accomplished. Evidence for validity usually comes from one or both of two major sources--the logical or rational approach and the empirical or statistical approach. (20. pp.98-103)

Forty studies and/or articles were reviewed. Of this number, twenty-two were classed as impressionistic analysis and eighteen empirical, either descriptive, exploratory or experimental. Of the twenty-two impressionistic analyses, only two provided any findings or results. Of the eighteen empirical studies, seven provided either a summary of findings or at least an indication of how the results would be evaluated.

Impressionistic Analyses

Three categories of task were devised in the Travellers Aid Society unit study (5), by differentiating the caseload according to the problem to be worked and service to be offered. According to the report, with implementation of these three categories the total unit work load increased and the quality and quantity of work increased. The only measures provided were those of interview count (up 50% in the year) and cases under care count (up 25% in one year). The suggestion was made that as well as numerically reducing the cases handled by the caseworker, the quality of treatment service was improved.

The Minnesota Department of Public Welfare study (1958) (23), had as its purpose to help a public welfare agency select cases needing intensive service where there is a high potential for improvement and to release administrative time for social workers through use of case aides, a flexible home visiting policy and revision of continuing eligibility procedures. This project clearly stated that a scientific test of the effectiveness of case-work treatment was not its purpose. The basic assumption was that casework will improve a situation given the time and the resources. Over a period of time a selected number of cases showed marked improvement: 28% improved, 47% showed potential to improve.

Empirical Studies

The purpose of the N.A.S.W. study, 1964 (37) was to identify levels of tasks as to their complexity and degree of autonomy required by the worker in their performance. Initially the committee identified approximately two hundred fifty tasks. These were condensed to one hundred sixty-three which were rated on a five point scale by twelve judges with social work training, according to complexity of task and degree of worker autonomy. Once these ratings were completed, the results were analyzed for the degree of judge agreement on the items. On the variable of complexity, one hundred twenty-eight items were retained and on the variable of autonomy, one hundred twenty.

Beck reported on a study (26) undertaken using the concepts of autonomy and client vulnerability and here also a system for ranking variables was set up. He indicated a problem might arise if a task ranked high on one variable and low on another. An arbitrary decision would have to be made on the relative importance of different variables or on other factors in a work situation.

Beck states that the criteria are not objective and cannot be scientifically validated. He suggests, however, that they can be subjected

to various tests. They can be tested against existing practice in social

work and other professions. The consultants in this study made trial runs

on various social work tasks using the formulation. In the various

agencies where the criteria were tested, the same ranking of tasks was

achieved. The same was done in other professions where there are already

sub-professional classifications, for example, dentistry and nursing, and

it was found that the resultant sorting of tasks was like that already in

existence for those professions. The results were considered "encouraging".

Heyman (10) reported on a two year study undertaken at Albert

Einstein Medical Centre in Philadelphia to alleviate the shortage of

professionally trained social workers by devising a scheme for allocating

work on the basis of worker skill. In regard to the evaluation of product-

ivity, two time studies were conducted at different intervals to record time

spent on direct and indirect service to the client. Specifically measured

were:

(a) Quantity of Service (before and after)--changes in
distribution of time, changes in average caseloads,
changes in differential use of levels of staff,
changes in doctor initiated services.

(b) Quality of Service. (before and after) A case
reader schedule was developed to indicate the
relative extent casework improved or deteriorated.
over a period of time. Judges from outside the
hospital made judgments on thirteen items under
the headings of "diagnosis and plan", and "treatment".
A .05 level of significance was used for acceptance
of judgments.

(c) Quality of levels of staff was also determined.
Other determinants of quality included more
exploration beyond intake, more use made of other
agencies, and fewer cases closed because request
for help withdrawn or client found inaccessible
to casework help.

Beck, Rantor et al, (1) reported on a study which was carried out

to determine whether there was a significant and practically important

change in the clinical and social status of psychotic hospital patients

following work done by volunteers who were college students.

Success was estimated to be 31%. Of the thirty-five out of one

hundred twenty who were out of the hospital at the time of the study,

clinical status was as follows: two--as sick as ever, ten--marginal adjust-

ment, eighteen--considerably improved, five--apparently well.

Weissman and Baker reported on the study undertaken by the C.S.W.E.

(1959) (35), which analyzed critical incidents to provide (1) job description

statements for four key social work positions in terms of inferred behavior

requirements for effective performance of the job, and (2) a tabulation of

the range of client problems indicated in the incidents to require these

behaviors. The critical requirements are a composite of critical aspects

of job behaviors in two different kinds of programs (public assistance and

child welfare) administered by nine different states. Some behaviors do

not necessarily appear in both programs or in all states.

Dumpson and Podell (27) outline a study which attempted to form-

ulate a plan to test the outcome, upon clients and workers, in public wel-

fare department in New York State, of various combinations of tasks to be

based upon the investigatory and service functions of public assistance

workers. It also proposed to test various model arrangements of trained

and untrained workers.

Hill (20) provides a reasonably detailed account of both the

Philadelphia Cost Study Method and the Schwartz-Wolins Cost Analysis

Method. The Philadelphia method is constructed around the concept of cost

centres--production and service. As the greatest part of the costs of

most agencies are for salaries, a year long time study was carefully designed

to obtain an estimate of the way each staff group (administrative staff,

supervisors, caseworkers and clerical staff) spent their time. On every

working day of the year, some (not all) of the staff kept a record of their time. Sample days for each staff member were drawn at random. This sampling method has the disadvantage of prolonging the administration of the time study. Its great advantage, however, is that the time sample is representative of the whole year. This is useful in a social agency where activities are known to vary greatly from month to month, season to season.

The chief feature of the Schwartz-Wolins project concerns the units of agency service to which the costs are to be related. One of the main purposes of the project was to develop and test a work measurement procedure for casework in a child placing agency. Although useful, this study points to a major problem in cost studies, namely, the selection of units that will measure adequately the output of agencies and yet be simple to use.

There are a number of different uses for cost accounting and cost data in social welfare administration and planning. It is undesirable and impractible to judge one method of cost analysis as better than another without relating each system to the purposes it is intended to serve. One thing is certain, costs should not be reduced at the expense or quality of service.

Staff Training Proposals

In a recent article, Levine (30, pp.9-17), states that the present output of professionally trained social workers is falling behind the projected need. In the U.S.A., in 1964, only one out of every five social workers was fully trained with two years professional education. There are 10,000 unfilled vacancies for qualified social workers; 15,000 social workers are needed annually to replace workers who leave and to meet growth needs. The annual output of fully trained social workers is approximately 2,500 and during the decade of the sixties, there will be a shortage of

about 16,000 workers to meet the growth needs alone. Levine, therefore, suggests that these needs indicate the intensive research and experimentation with new methods and approaches if the gap between needs and resources is going to be closed.

Not only must staff be trained and retrained, but also agency structures must be reorganized and Boards and Heads of Departments must be convinced of the usefulness of new schemes requiring staff training. Fesler (18), points out that stability of agency policy and method and competence of its field personnel is one factor controlling the degree to which an agency decentralizes. In order for a Public Welfare office to function efficiently and offer constructive service it must be decentralized to a fairly high degree. New methods of service, therefore, must be effective in order to warrant the support of administration.

It has been pointed out by Whitte (36) that the ideal of an M.S.W. degree for all social workers is unrealistic and unnecessary. He says the profession should carry out over-all planning to establish priorities, to assess present facilities, to set goals, and to encourage public understanding of the problems. Fisher (6), goes a little further by suggesting we must look at the role employers, particularly private agency boards and government departments must play in development of personnel. He thinks that although the Schools and in the profession have an important part to play in education of social work, there must be more. There must be understanding and support of social work needs from employers, business leaders and government of all levels. The many areas of industry, because of staff needs, have had to develop staff training programs and social work could look and learn from some of industry's very efficient and proven staff training programs.

Daly (4), quotes Dennison as making the point that social work

sometimes under pressure of crisis, or because of lack of resources, produces a makeshift remedy for what is going to be a long term problem and in the future, continue to use and build on it. Thus social work sometimes creates a new state of affairs and not a solution. Therefore, we must be sure that our new programs are appropriate to the need and that the jobs required to be filled are really necessary.

It will be necessary to develop, finance and recruit students in high school, college and graduate levels to educate for positions in social work. Only for the graduate level of social work has the educational process been formalized. Responsibility for training must lie with the Public Welfare Administrators and they must maintain a close liason with the training facilities at all levels.

It is generally agreed that a program of in-service training for all levels of staff is required but for staff functioning on the level below that of the professionally trained there should be more intensive training. The report of the U.S. Department of Health, Education and Welfare (21), suggests training for the professional worker should be focussed on the application of professional principles to his specific job and that all levels should learn agency philosophy, function, policy and methods of administration. Weissman and Baker (35), support this view by suggesting that there should be some form of in-service training program even for those workers who come to an agency with full qualifications.

It is suggested in the Encyclopedia of Social Work that there is a need to develop programs for personnel at undergraduate levels. It is estimated in this article that at the present rate of growth the needs by 1970 will be approximately $2\frac{1}{2}$ times present staff. Development of new schools of social work in untapped geographic areas will be of some help. Meyer (31), warns that schools of social work are giving preconceived views

of social work jobs to students and they, therefore, are not going into Public Welfare agencies. Gripton (29), goes further and states that the use of training grants has been somewhat unsuccessful because a worker may have to divide his loyality between the Public Welfare Agency and the profession of social work.

A report of the Working Party on Social Workers (22), chaired by Younghusband outlined three main proposals for training:

(1) full professional training of the highest qualification.

(2) general training of related theory and practice to be given in colleges or other education establishments, with the cooperation of the universities.

(3) training for welfare assistants or case aides-- planned in-service training designed to give understanding of common human needs and stresses and to train these workers to detect early signs of stress or other problems beyond their capacity to handle.

The literature is very clear and there appears to be unanimous agreement on the need for further educational facilities and training programs for social workers at all levels and in any setting.

Limitations in the Literature Reviewed.

There are many articles published dealing with the manpower crisis in social work and just as many different schemes proposes for solving this dilemma. There does not, however, appear to be any co-ordinating body or group assigned the task of pooling together the available information or evaluating the existing programs in order to come up with a workable solution.

The literature generally agrees on the need for more profession-ally trained social workers and that personnel with lesser education and training can provide a useful and necessary service. However, apart from

stating that in-service trained and case-aide workers are required, little suggestion is made of the methods of training or types of courses that should be made available. Public Welfare agencies and politicians will want to know how much reorganization and training programs will cost in relation to service returns. It has always been difficult to discuss changes with government without knowing costs, and how difficult it is to put a price tag on human behavior. The literature cited does not discuss costs of training programs, savings in dollars through better utilization of staff, and the amount of money required to institute a research program. Furthermore, no hint is given as to where the trained personnel to conduct the necessary research is going to be obtained.

Attention is now turned to the design of the present study.

CHAPTER III

STUDY DESIGN

Conceptual Framework

As has already been documented in the review of the literature, there is a growing need for planned deployment of professionally trained social work personnel in terms of tasks to be performed commensurate with their knowledge and skills.

At the present time, even if there were available a sufficient number of workers with varying levels of education and training, no rational basis exists by which they might best be deployed. Thus, the overall goal to which this study is committed is to explore the criteria that could be best utilized to provide a rational scheme for deploying staff.

If criteria are found, they could be used to develop a later study in which tasks that have been classified could be assigned to workers with varying levels of educational preparation and training. The results could then be systematically observed, tabulated and evaluated. One could, for example, observe the outcome of introducing welfare aides at varying levels of responsibility. Ultimately, it is hoped that the efficiency and effectiveness of service to clients (in terms of movement, quality, quantity and so forth) will be improved. It is not the purpose of this study to develop means by which a cheaper but less appropriate source of labour will administer certain aspects of the Social Allowance Program.

Questions to be Studied

The specific question this study seeks to resolve is: With what realiability can the concept of autonomy be applied to the tasks performed in a public assistance setting.

Once the criteria have been identified and defined, it may be assumed that identified social work tasks may then be ranked in terms of the criteria. The ranked tasks would be organized or classified into work assignments corresponding to social worker positions. Establishing validity for the criteria could only be accomplished by utilizing task assignment in a field experiment developed to test whether or not the quality and quantity of service to a client actually improved. This will be beyond the scope of our study and will be left for future researchers to follow up. In the meantime, it is assumed that the use of criteria as outlined above in determining task assignments would be an improvement over the present system for assigning tasks.

Richan (26) proposed a basic formulation to differentiate the kinds of tasks performed by workers with different levels of skills. He suggested that one should examine not the nature of the tasks but the degree to which organizational or professional controls are required by each level of worker in performing his activities. Thus the criteria chosen should relate directly to the major factors differentiating various levels of worker skill and capability, i.e.,the M.S.W., the B.S.W., the in-service trainee, and the welfare aide. Selecting criteria on this basis leads directly to relating the ranked tasks to worker positions. The alternate choice of selecting arbitrary criteria only from the nature of the tasks does not directly account for the factors that differentiate each level of worker. Criteria chosen, as proposed by this study will likely be more valid than by any other method. In addition, such a scheme of tasks assignment would lead to utilization of professional and non-professional workers as they are now being trained and educated.

Reliability for the criteria can be established if the judges can rate the tasks (in terms of the criteria) within a pre-established limit of

acceptance. Tasks rated with 80% or better agreement will be accepted.
Tasks rated with 60% - 79% agreement will be viewed as supporting the use
of autonomy as the criterion, however, these tasks will be reviewed with
the view to establishing finer definitions. Tasks rated below 60% agree-
ment will require a complete re-assessment of the task definition.

Concepts to be Included in the Study

(1) Task: A task incorporates that which is done by a social
worker in providing a service as defined within the Social Allowance Act.
The Act states that social assistance means:

"(a)   financial assistance;

(b)   assistance in kind;

(c)   institutional, nursing, boarding or
foster home care;

(d)   aid in money or in kind to municipalities
boards, commissions, organizations or
persons providing aid, care, or health
services to indigent, sick, or inform
persons, and in reimbursing expenditures
made by them;

(e)   counselling services;

(f)   health services;

(g)   occupational training, retraining or
therapy for indigent persons and
mentally or physically handicapped
persons;

(h)   generally any form of aid necessary to
relieve destitution and suffering."
(42, p.4541)

These services, for purposes of this study, have been divided
into work units i.e. clusters of tasks which occur together. Thus a
task represents one step in a work unit. The work units are: Initial
Contact, Ongoing Contact and Termination Contact. Ongoing Contact has
been further divided into Administrative Procedures, Community Relationships

and Treatment Services.   (See Appendix A for full list of tasks).

(2) Client: The client, or more precisely, the configuration
he brings to the agency that requires the performance of certain tasks by
the worker.   This concept will not be directly used in this study but is
necessary at some future stage when the instrument designed by this study
it utilized in an experimental study.   At the present, the concern is
whether criteria to rate tasks can be adequately developed.

Variables to be Included in the Study

(1) Autonomy: This is the major variable to be utilized in
this study and the definition used by Beck (26) and quoted in the review
of the literature, seems to be appropriate for our purposes.   While
autonomy will be specified in detail at a later stage a general operational
specification is that it incorporates the explicitness of guides to the
worker, the visibility of practice, and the degree of required organizational
support for social work standards.   It is a requirement that the tasks be
explicitly defined in these terms if the judges are to rate them in terms
of autonomy.

(2) A second variable consists of the attributes of tasks which
provide the basis of task assignment to varying levels of welfare workers
i.e. those attributes requiring varying degrees of worker autonomy in the
performance of the task.

(3) Other studies of this nature have tried to use other
variables which have all presented drawbacks as follows:

(a) Vulnerability as a criterion presents difficulties in
scaling, assessment and task definition.   Eventually it is probable that
vulnerability will have to be employed but for our purposes, it is too
complex to be used as a separate variable.   Indeed, autonomy would seem to
incorporate vulnerability.

(b) Fact-finding, while it appears to be most applicable
to public welfare, is not comprehensive and is an attribute, not a
variable measurable on a continuum.

(c) Decision making is an integral component of autonomy.

(d) Complexity also is an integral component of autonomy.
It is not likely that autonomy would be required if tasks were not complex.

Having designed a theoretical framework of the purpose, the under-
lying assumptions and the values of the study, the attention may now be
given to establishing a research design.

Level of Research Design

Given the present state of knowledge available in the area under
consideration, the level of research design in this project must be
considered exploratory. Before an experimental design can be formulated,
a rational basis must be established by which social work tasks can be
assigned. This is the problem to which this study addresses itself.

Variables to be Included in Study

Autonomy

Working on the assumption that social work, as suggested by Beck
(26) has both organizational and professional controls, the concept of
worker autonomy refers to the degree to which the worker is called upon to
function autonomously depending on his built in professional controls.
Inherent in this concept are the facts that,(1) many social work tasks are
not spelled out in a book of regulations, (2) casework is almost invariably
closed to direct observation and (3) in some settings there is a greater or
lesser organizational support for social work principles.

There are factors within the client situation which we have chosen
to call objective and subjective which also have a bearing on the amount of
autonomy required by a social worker in the performance of the tasks. The

concept of autonomy also implies recognition of the necessity of the worker

having knowledge and ability to deal with these factors.   Objective may be

defined as primarily concrete acts dealing with the physical needs of a

client as opposed to those of a psychological nature, for example, providing

accommodation.   Subjective may be defined as primarily those acts dealing

with the psychological (emotional) as well as the physical needs of the

client, for example, a concern with motivation, ego capacity and so forth.

For purposes of this study, the concept of autonomy is placed on

a five point scale for the purpose of rating the list of tasks, confirmed

and performed by workers carrying social assistance caseloads.   The tasks

will be rated by the judges in terms of the lesser or greater degree of

worker autonomy required in their performance.   The five point rating scale

is attached.   (See Appendix B)

It was felt that the concept of autonomy included task complexity,

fact-finding, decision making.   No attempt was made to identify or control

interferring variables.

Data Analysis Design

The purpose of this study, as has been stated, is to determine if

the tasks performed in providing service to a social assistance recipient

can be reliably rated in terms of worker autonomy.   Such reliability can be

established if the panel of judges can rate each task with at least 80%

agreement on the five point rating scale already developed.   The 80% level

of agreement used in the Finestone study, (28) is based less on its

statistical validity as a measure than its applicability to this study.   It

provides an adequate standard by which to establish whether each task has

been rated relatively reliably.   It is adequate in that perfect agreement

is neither required nor expected.   One must expect there will be some

differences in the judge's interpretation of tasks due to their widely

varying backgrounds in service, a factor that is impossible to control.

While this factor might seem to negate the whole approach of this study,

it must be pointed out that one purpose of developing a scheme of tasks

assignment is to standardize service, i.e., replace the present system

with a more rational one.   It should also be noted that a scheme of tasks

assignment would have to be flexible, thus 100% agreement is not necessary.

The level of 80% is sufficiently high enough to lead us to believe that

reliability has been established.   However, the validity of such a measure

can only be tested by an experimental study employing the task assignments.

Sampling Procedures

Study Populations Needed and Available

(1) Worker Population: The population from which our sample

will be chosen is all those social workers carrying predominantly social

assistance caseloads in public welfare offices in the province of British

Columbia.   These social workers perform functions sanctioned by the Social

Assistance Act of British Columbia and implemented in response to client

need.

(2) Judge Population: The study population from which the judges

will be selected are those social workers in the province of British Columbia

who are either members of C.A.S.W. or eligible for membership in this

association.

Determination of Needed Sample Size

(1) Worker Sample: The necessary worker population for purposes

of this study was made available to us by the Department of Social Welfare

in the Greater Victoria Area.   In three offices, Victoria City, Victoria

District and Saanich, there were workers available who had sufficient

experience in the field to ensure that the researchers would be measuring

the tasks performed rather than the worker's learning activities.   We felt

that there was a danger of measuring the latter if the worker population contained a high percentage of newly placed in-service trained workers.[1]

We felt that the worker sample should range in size from six to ten workers, in order to ensure a range of education, training and experience. In choosing workers from three offices in the greater Victoria area we recognize that the sample is not random, however, it may be considered representative in broad terms. It should not interfere with our attempt to ultimately relate the tasks performed to the level of worker skill and training. In short, we felt that a measurement of tasks performed could best be obtained by examining those jobs done in several offices offering the total spectrum of services under the Social Assistance Act, in urban, suburban and rural areas and by experienced or at least not newly trained in-service workers.

(2) Judge Sample: We felt that the judge sample should range in size from ten to fifteen. Our criteria for the judges were: (1) that they have full professional training (M.S.W. or equivalent), (2) that they be presently employed in public welfare or that they have had some public welfare experience. As such the judges will constitute a homegeneous group so that a relatively small sample will suffice and make for a high degree of accuracy.

Choosing the Sample

To obtain our worker sample, the thesis members personally and by letter explained to the supervisors and administrator of the three offices from which the workers would be selected, the nature and purpose of the project and our requirements regarding the workers to be chosen. The

1. In the initial stages of this study, the plan was to use an office in close proximity to Vancouver. On closer examination, however, we learned that a number of the workers there were new and in-service trained and therefore not suitable for our purposes.

requirements were: (1) that the workers have at least two years experience in the field of public welfare, (2) that they be carrying social assistance caseloads, (3) that there be a range of education, (4) that the workers be willing to co-operate in the project. Each supervisor chose workers, according to these criteria, from his office to participate in the project. The total worker sample was seven.

With regard to the judge sample, we attempted to obtain workers with Masters of Social Work degrees who were employed by the Department of Social Welfare. As a sufficient number was not available in the immediate Vancouver area, judges, who met our criteria, were obtained throughout the province. There are approximately 15 in the province who met our criteria but only 11 were available to us. In order to enlarge our sample to 14, three individuals known to the researchers and who had indicated an interest in assisting in the rating were invited to participate. These three judges met the criteria, however, they are not, presently employed in public welfare but have previous experience in this field.

Methods of Gathering Data

Our review of the literature revealed the following method of data collection: interviewing clients and/or workers, case file study, daily work sheets, telephone calls to workers, time study, participant observation and self completed questionnaire.

(1) Interviewing clients and/or workers; Although flexible, this method had two serious drawbacks in that it would tend to be time consuming and expensive, both from the point of view of training interviewers and collecting information and classifying it. Because of the lack of anonymity both for the client and worker, there is the danger that results would be skewed, particularly when dealing with material that could be considered threatening and/or biased.

(2) Case file study: The analysis of records is timeconsuming. It would tend to lack both realiability and validity due to poor and incomplete records, lack of uniformity in recording and the often favorable bias of recording.

(3) Daily Work Sheets: Although this method is relatively inexpensive and workable we feel, it is unfeasible due to time factors both for the researchers (re: the collating of material) and the worker partic- ipants. The workers sometimes view these work sheets as administrative nuisances and can "cook" them or at least complete them in such a way that results are inaccurate.

(4) Telephone calls to workers: This provides a uniform method but would not necessarily be comprehensive. There would be a probable resentment felt by workers at such interruptions and it would be expensive and time consuming.

(5) Time study: This method is also applicable but encompasses many of the limitations listed above. The time sheets may be completed incorrectly; they may be viewed as administrative prying. As such, validity suffers.

(6) Participant Observation: Although uniform and relatively comprehensive it is highly time consuming and expensive. As it is dealing directly with the client, confidentiality would be jeopardized.

(7) Self Completed Questionnaires: This method is useful in that it is inexpensive and the information can be gathered simultaneously. The information is uniform, relatively comprehensive and confidentiality is ensured. In comparison to many of the other methods it makes for the least infringement on worker time. The most striking limitations are that the questionnaires depend to some extent on the knowledge of professional jargon and/or the frame of reference and may omit routine behaviors not recognized

consciously and as such the measurement of validity may be affected.

In considering all the alternate methods of data collection the use of the questionnaire, consisting of the list of tasks, and the rating scale for the rating of the tasks by the judges, appears to be the most feasible method for our purposes. It is easy to administer, flexible, allowing for fine definition within a specific frame of reference. It is inexpensive both in terms of both economics and in terms of worker/judge/ researcher time.

The Questionnaire

On the basis of the combined 22 years experience in public welfare of the researchers, a tentative list was drawn up of the tasks performed by social workers in the various phases of their contact with clients. The three suggested phases are the "Initial Contact", the "Ongoing Contact" and the "Termination Contact". The tasks were divided in this way for the sake of clarity although it is appreciated that some of them are performed during all phases of social work activity.

As the workers participating in the project were required to determine if, over a two week period, they actually carried out the tasks as listed by the researchers, the letters (a)....., (b)....., and (c)..... followed each task listed. Those tasks performed during the first week were tallied after (a) those performed during the second week were tallied after (b) and those not performed during the period of the study but at other times during the work year after (c) a tally was made each time a test was performed. Explicit instructions were drawn up on the use of the questionnaire for the workers participating in the project, so that any ommissions, ambiguities or superfluous statements could be brought to the attention of the researchers. (See Appendix A)

. Procedures

The questionnaire was completed by the nine social workers in
the Victoria area offices following two meetings at which time the research-
ers outlined and explained what was necessary by way of completing the
questionnaire. In order to avoid any skew specific reference was made to
the fact that we were not in any way evaluating task performance. Following
the two week period during which the workers completed the questionnaire, it
was found that only two tasks had to be deleted from the original list.
The criteria for selecting a task as being appropriate were:

> (1) indication by at least one social worker that the
>   task was performed.

> (2) absence of disagreement with regard to any task
>   definition

A task was to be rejected if none of the social workers performed it. To
enable the judges to accurately rate the tasks for social worker autonomy
a five point rating scale was devised by the thesis group. (See Appendix B)
The rating scale progresses from a low rating of (1) which denotes low
worker autonomy to a high rating of (5) denoting high worker autonomy.

The rating instrument was given to the fourteen judges. Of the
eleven public welfare judges, only one was a field level worker with the
rest being in supervisory or administrative positions.

It was a concern that the judges at administrative levels in
public welfare and those employed in other agencies would not be able to
interpret the tasks that had been confirmed by workers at the field level.
Furthermore, we were concerned that there could possibly be a professional
bias in favor of tasks being rated at a higher level of autonomy than would
be necessary. The alternate would be to lower our criteria for selection
of judges. However, our belief in the complete professional objectivity led
us to maintain the high criteria for the judges selected to rate the :

instrument.

The judges because of the long distances involved were unable
to attend a meeting where the instrument and instructions for rating could
be discussed. It was necessary to mail the material, including detailed
instructions for completion, to them. On the basis of the return of
eleven instruments out of fourteen the data analysis was compiled and is
the subject of the next chapter.

CHAPTER IV

STUDY FINDINGS

Descriptive Data on Study Sample

The Social Workers

The seven workers completing the instrument were all In-service trained. In terms of education, two workers had Bachelor of Arts Degrees, one had third year university, two had senior matriculation and one had grade 12.   One of the sample workers did not record his educational level.

The work experience of the seven workers ranged from a high of ten years in the public assistance field (one worker) to a low of three years (three workers).   Two of the workers had eight and one half years experience and another had four and one half years experience.

It is apparent that our study measured the task activity of experienced workers.

Task Measurement

The combined Social Assistance caseloads of the seven workers amounted to a total of 862 cases.   Of this total, 522 were classified as urban and 340 as rural.   It appears, therefore, that a fairly even distribution of urban-rural cases was obtained.   As such, tasks performed in both rural and urban cases were measured.

The returned questionnaires, indicated that Task #64, "Recruiting and Training Volunteers, " and #65, "Supervising In-service Trainees," were not performed during the two week test period or at any time during the year by the sample workers.

Task #66 "Addressing public meetings or community groups on social work," and Task #67 "Representing agency at public meetings, radio, tele-vision etc.," were not performed during the two week test period; however,

one worker indicated that he performed these tasks at other times during the year.

All the other tasks were performed during the two week test period. None of the tasks were queried as to validity, although two workers indicated that it was impossible for them to accurately record the frequency of performance of each task because of pressures of work. One worker questioned the plausibility of constructing a model for deployment of social work manpower from the contents of a 15 to 20 minute interview. Another noted that he found the questionnaire offered insufficient space to record the number of times he performed administrative tasks involving case closings.

The workers suggested three tasks that they felt were not included in our questionnaire: home visits, cases diagnosed and categorized for casework processes, discussion with social workers on a specific case.

From this initial phase of the study, it could tentatively be concluded that the instrument validly measures the tasks actually being performed in a social assistance caseload.

The Judges

Fourteen judges, eleven presently employed in public welfare and three with previous experience in this field, were used in this project to rate the tasks. As many of the judges were, of necessity, located outside the Vancouver area, it was impossible for the researchers to meet with them collectively to discuss the instructions for rating. Instead, the detailed instructions were mailed to the judges along with the list of tasks for rating. Of the fourteen mailed, eleven were returned. One, however, was not fully completed and could not be utilized. The results then were compiled from the ratings of ten judges.

All the judges had a Master of Social Work degree from the School

of Social Work at the University of British Columbia. They ranged in total experience in social work, from four years to twenty-two years, for a total of 117 years. Their experience in the field of public welfare ranged from two years (two judges) to twenty years (one judge). Two judges had 16 years experience, two had ten years, one had eleven years, one seven years and one four years experience in the field of public welfare, making for a combined total of 98 years experience in public welfare.

Three of the judges with previous public welfare experience are now working elsewhere. One is a social worker at the Children's Aid Society, Vancouver; one is a social worker at the Mental Health Centre in Burnaby as well as a field supervisor for the School of Social Work, University of British Columbia. The third is an instructor at the School of Social Work at this University.

The seven remaining judges are all employed by the Department of Social Welfare: three are district office supervisors, one is a regional director, one is a training supervisor, one, the special placement supervisor, and one, the Deputy Superintendent of Child Welfare.

The judges, with full professional qualifications and an average of nearly ten years experience each in public welfare should give us the most objective results possible.

Analysis of the Ratings

A review of the 128 tasks submitted to the judges for rating revealed that 16 tasks were, in essence, unrateable due to the fact that they were activities required of all workers and did not require autonomy in their completion, for example, attending meetings, completing expense accounts, recording. While the degree of participation may differ for each level of worker, the level of autonomy does not. Removing these unrateable tasks left a total of 112 tasks to be analyzed. The results are

as follows:

					Number	%
1.	Tasks receiving agreement of 80% or better -				10	9
2.	"	"	"	" 60% to 79% -	37	33
3.	"	"	"	" 59% or less -	65	58

While very few of the tasks received the desired 80% agreement,
it was significant that the judges' ratings usually followed a pattern
tending to cluster at two adjacent ratings, e.g., 60% at rating 5 and 40%
at rating 4.   While it is obvious that the instrument is not yet reliable,
the fact that 41.9% of the tasks received over 60% agreement is encouraging
and leads us to believe we are going in the right direction.   Our next step
was to examine the list of tasks and the definition of autonomy.   The close-
ness of ratings seemed to indicate that the definition of autonomy was not
fine enough to allow distinctions between adjacent ratings, or that the tasks
were not defined with sufficient clarity for the judges to make distinctions
regarding the amount of autonomy required or it could, of course, be a
combination of the two.   We, therefore, approached the judges for their
comments about problems they encountered in rating the tasks and we review-
ed the task definitions.

Problems Encountered

Our review leads us to believe that a major problem in establish-
ing better reliability in the judges ratings of the tasks is dependent on
sharper, more precise definitions of the tasks themselves.   Several faults
were noted by most judges in the task definitions only three judges however,
criticized the rating instrument.

The comments on the rating scale itself indicated two possible
problems.   The first was whether objective (representing material matters)
and subjective (representing psychological matters) are a valid dichotomy.

The question was raised whether any task could be considered apart from the nature of the client and his problem, or whether the emotional aspects could, in fact, be separated out. We have spoken on this earlier, noting that any highly sophisticated scheme will rest upon judgments concerning client vulnerability. How these judgments are made would have to be incorporated in any task assignment scheme. However, client vulnerability does not necessarily affect the intrinsic nature of the tasks, which is, of course, the focus of this study. The second problem, raised by only one judge, was whether to rate a task in terms of the autonomy required now in its performance or in terms of the autonomy that should be required in its performance. These objections, while important do not, in our opinion, indicate problems with the instrument, but rather, problems with the presentation of the instrument to the judges. This could be overcome by meeting with the judges, as a group, before they rate the tasks to outline the instrument and what is required.

Thus, turning to the list of tasks, we noted that of the original list of 130 tasks submitted to the direct service workers for review, only two were rejected and no specific suggestions were made for revision or deletion of any of the tasks. This could be due to the lack of time, the workers had to devote to the list. It could also be due to the fact that all the sample workers were In-service trained. As such they may have felt that a list of tasks, drawn up by second year students at a School of Social Work, was beyond reproach, i.e., since the subjects were fearful of making a mistake, no criticisms were made. One further deficiency, at the initial stage, of this study was that no B.S.W. or M.S.W. reviewed the list of tasks. The above considerations, as well as the criticism of the judges to the effect that task definitions were not clear, led us to revise all tasks receiving less than 80% agreement.

We noted in the definitions of a great number of tasks, the use
of certain words that could be unclear or confusing. These included words
such as "assess", "determine", "evaluate", "complete", "arrange" and
"interpret". Their use in the questionnaire was often misleading and
"double-barrelled". For example, "evaluate" was used interchangeably with
"assess". The word "complete" was often used where "assessment" was meant.
Of the tasks receiving less than 80% agreement, 36 were affected by the
above mentioned words. As it would appear that some standardized use of
words would be appropriate, we have defined them as follows:

> Assess - The mutual process of determining what the problem
> is, what are the relevant precipitating factors, and general
> approaches to solving the problem.

> Evaluate - A judgment as to effectiveness of plans, treatment,
> and so forth, in attempting to cope with the problem.

> Complete - The performing of the procedural requirements of
> an activity.

> Explaining - The process of giving requested information.

> Interpretation - Explanation of the reasons for certain
> actions and of the manner in which they effect the client.

Other tasks were found to be similarly unclear in definition and
attempts were made to avoid "double-barrelled" questions and duplications
of tasks. The revised list is attached as Appendix C.

Apart from the task definitions, problems appeared in the
procedures used in recruiting judges and in giving them instructions. Due
in part, to the use of mailing distribution, we received only eleven
questionnaires from the fourteen judges. Of the eleven, only ten were fully
completed and usable. Of these remaining ten, there were seven completed
by administrators and three by non-departmental people. None of the ten
judges were presently employed as direct service workers in public assistance.
Furthermore, although it was believed that M.S.W.'s would be the persons

most likely to provide objective, professional opinions, it is likely vary-
ing experience in public assistance. While at best, this variable is
minimally controllable, it was not controlled at all in this study. The
reasons for this are that: there was an extremely limited number from
which to choose the judge sample; each judge likely had different interpret-
ations and preconceptions of tasks due to his experience; there was little
or no personal communication between the researchers and the judges because
the latter was spread through the province.

There is also a strong possibility that the judges tended to rate
tasks in terms of how they thought the rating would be utilized in a task
assignment scheme. This possibly would be due to their concern with
improving standards of service and to their bias as M.S.W.'s. Again, this
is a very difficult factor to control.

In addition to being clustered at adjacent ratings, we noted that
the model rating tended to be 1, 3 or 5. Of 47 tasks rated in these three
levels, 28, or 60%, were rated at 1 or 5. It was thought that a three
point scale might therefore, be more appropriate for our purposes. We
decided, however, that there was no basis for combining the judges ratings
1 and 2, 4 and 5, to create a three point scale. The rating scale is
designed so that 1, 2, 3, 4 and 5 are approximately equidistant. We
recommend that the redesigned list of tasks be submitted to the judges for
rating after the following procedures:

1. Meet face to face with the judges as a group to discuss
   procedures and problems. This will help over come such
   difficulties as "non-returns" and establish some control
   over bias and preconception. Common interpretations
   of the tasks. The variable of autonomy and so forth,
   a more standardized point of view in rating the tasks
   would be developed.

2. The sample of judges would be improved if a number of
   line workers could be recruited as judges. The ratings
   as reported above were made by persons no longer carrying

out direct service tasks. Even if involving direct
line workers means accepting B.S.W. as the qualifying
level of training, it would seem that this would be a
desirable step.

3. The judges should be requested to record the lowest
   amount of autonomy required to adequately perform the
   task. This should be based on the intrinsic nature
   of the tasks and the worker's capability rather than
   on client vulnerability.

4. A "Glossary of Terms" should be included with the
   rating scale in order to avoid confusion in the
   employment and meaning of such words as "assess",
   "determine", "evaluate" and so forth.

We feel there is no indication that the criterion of autonomy

should be rejected at this time. Rather, if the revised list of tasks can

be given to judges to rate again as outlined above, it is our opinion that

a much higher degree of reliability can be established than was achieved

in this study. Should the new ratings prove to be reliable, the way would

then be clear to develop a task assignment scheme to be utilized to establish

validity of our instrument.

CHAPTER V

SUMMARY

It is becoming increasingly apparent that a "man-power crisis"
exists in the field of social work. The reasons are many and varied and
include such factors as the expansion of existing social services, the
introduction of new services, the growing demand for "better" services and
the rapid increase in population in the most vulnerable groups.

This project addresses itself to the man-power problem as it is
found in the area of public assistance and is concerned with developing a
rational plan for the deployment of social work personnel with varying levels
of training, in terms of tasks performed commensurate with their knowledge
and skills. The goals of this project are to pave the way for:

    (1)   appropriate utilization of professionally trained
        personnel,

    (2)   protection of social allowance recipients from
        inappropriate and sometimes damaging treatment by
        untrained personnel,

    (3)   provision of services of a restorative and preventative
        nature.

In accordance with these objectives, the literature has been
reviewed to reveal (a) criteria employed for classifying social work tasks,
(b) social work staff classification schemes, (c) work assignment schemes,
(d) methods of evaluating criteria, and (e) methods of training personnel.

The criteria most frequently used in attempting to classify those
tasks which can be performed by the professionally trained worker and those
which can be done by the less than fully trained were "worker autonomy",
"task complexity", "client vulnerability", "fact finding", "decision making",
and "client need". Only "worker autonomy" and "client vulnerability" were
found to have been operationally defined. Client vulnerability is suggested

as being a useful concept when the focus is on the client and not the activities of the worker. When it is worker tasks which are being rated and classified, the concept of worker autonomy is suggested as being more appropriate.

Schemes of staff classification are many and varied. In general, however, all social work positions can be classed under four main headings. The professional is the fully trained worker (M.S.W. or equivalent) who operates in situations where the most skill and professional knowledge are required. The non-professionals are those workers without complete professional training but with some orientation toward social work. Education and training differ. In general, however, less professional knowledge and skill are required in the tasks they perform. This category includes the sub-professional, the specialist, the case aide, and the indigenous worker. The volunteer and the clerical staff are the other two categories of staff found in the classification schemes.

Two main methods of work assignment have been suggested in the literature--"case streaming" and the "team approach". Each is an attempt towards more effective utilization of personnel at all levels of education and training but indications are that present programs for staff deployment are inadequate in that the criteria used in such endeavours are neither explicit nor service (treatment) oriented.

Training of the various types of social work personnel should be the concern and responsibility of schools, universities, colleges, agencies and all levels of government. There is need for evaluative research. The social work man-power crisis is a multifacited phenomenon that must be approached from many directions simultaneously and in well balanced, co-ordinated efforts.

This project is an exploratory study based on Richan's suggestion

that a model for worker deployment can be more effectively developed by

first determining the degree of organizational or professional controls

present or required in the performance of the various tasks in a public

welfare agency. The specific question posed in this study was--with what

reliability can the concept of autonomy be applied to the tasks performed

in a public welfare setting. The tasks referred to are those sanctioned

under the Social Allowance Act of British Columbia and performed by workers

in the issuance of social allowance.

Beck's definition of autonomy, the major variable used in this

study, was accepted as appropriate for our purposes as it incorporates the

explicitness of guides to the worker, the visibility of practice and the

degree of required organization support for social work standards. The

concept also implies recognition of the necessity of the worker having

knowledge and ability to deal with objective and subjective factors in the

client situation. Objective tasks were defined as primarily concrete acts

dealing with the physical needs of the client as oppossed to those of a

psychological nature. Subjective tasks were defined as primarily those

acts dealing with the psychological (emotional) as well as the physical needs

of the client. The concept of autonomy was placed on a five point scale

for the purpose of rating the tasks performed by workers carrying social

assistance caseloads, in terms of the lesser or greater degree of autonomy

required in their performance.

A list of tasks performed in the issuance of social allowance,

from initial contact through to termination was drawn up by the researchers

on the basis of their knowledge and combined twenty-two years experience in

this area. This list of tasks was presented to seven experienced workers,

presently employed in three public welfare offices, and carrying social

assistance caseloads in urban and rural areas. The worker sample, although

not random, was representative in broad terms. The workers were asked to determine, over a two week period, by noting their daily activities, if the list was accurate, complete and unambiguous.

The validated list of tasks was presented to a panel of fourteen judges for rating, on the basis of the degree of worker autonomy required in their performance. All judges had full professional training (M.S.W. or equivalent). Eleven were presently employed in public welfare, and three, although not currently working in public welfare, had previous experience in this field. It was felt that the judges constituted such a homogeneous group that this relatively small sample would suffice and ensure a high degree of accuracy.

This method of data collection, involving the use of the questionnaire and the rating scale was considered the most feasible for our purposes. They were easy to administer, flexible and allowed for fine definition with a specific frame of reference. This method was inexpensive both in terms of financial expenditure and worker/judge/researcher time.

It was felt that a satisfactory degree of reliability for the judgments could be established if the judges could rate the tasks (in terms of the criteria) within a pre-established limit of acceptance of 80%. Tasks rated with 60% to 79% agreement were viewed as supporting the use of autonomy as the criterion but requiring finer task definition. Tasks rated below 60% agreement were considered to require complete reassessment of the task definition.

A review of the 128 tasks submitted to the judges revealed that 16 tasks were, in essence, unrateable due to the fact that they were activities required of all workers and did not require autonomy in their performance. Of the 112 tasks analyzed 10 (9%) received agreement of 80% or better, 37 (33%) received agreement of 60% to 79% and 65 (58%) received agreement of

less than 59%. While very few of the tasks received the desired 80% agree-
ment, it was significant that the judges ratings followed a pattern tending
to cluster at two adjacent ratings, e.g., 60% at rating 5 and 40% at rating
4. In addition to this the modal ratings tended to follow a pattern of 1,
3 or 5. Although a three point rating scale might have been more appropriate
for our purposes, we felt there was no valid basis for combining the judges
ratings at 1 and 2, and, 3 and 4, to create the three point scale. The
instrument was designed so that 1, 2, 3, 4 and 5 were approximately equi-
distant.

The study has pointed out that although tasks acceptable as being
valid by the worker carrying them out, can be misleading to an expert judge.
It is necessary, therefore, that the tasks be defined concisely and clearly
so as to be completely descriptive as to what is done. The judges should
also be seen personally in a group by the researchers so that a more stan-
dardized point of view in rating the tasks be achieved.

The worker population was a fairly representative cross-section of
education, training and experience of social workers in a public welfare
agency. Our judges represented a high level of expert social work personnel
capable of objective decisions on the rating of the tasks. The sample of
judges could be improved, however, if a number of line workers could be re-
cruited as judges. The ratings received in this study were made by persons
no longer carrying out direct service tasks.

Our list of tasks, on re-examination, showed them to be poorly de-
fined in some instances. The work units appear to be acceptable divisions
of tasks. By redefining the list of tasks so that the judges have a better
understanding of what is involved, a more uniform agreement may be realized.

We have redefined the tasks for future presentation to a panel
of expert judges for rating on the basis of the fivepoint rating scale

(autonomy). On the basis of these results a model could be conceived whereby the tasks performed by social workers with different levels of education and training could be validated, by putting the findings into practice.

The findings of this study will be placed at the disposal of next year's class where hopefully another group will carry on with the project where we have left off. It has particular ongoing interest to the B.C. Association of Social Workers who will be using the results in conjunction with a survey of their own. The B.C. Department of Social Welfare will be able to use the results in their offices where the social allowance program is administered. There are broader implications for all those concerned with the man-power problem. Many solutions have been proposed but a working model has not been tested and validated. The end product of our study will offer such a model.

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APPENDIX A

EXPLANATION OF THE STUDY

Purpose

We are presently undertaking a research project to ascertain

how to make the best possible use of social work personnel in a public

welfare agency.

The purpose of this particular phase of the project (which will

last two weeks), is to determine those tasks being performed now and those

performed at other times of the year by social workers carrying social

assistance caseloads.

Instructions

The first sheet is to provide certain statistical information.

Names are <u>not</u> to be given.

We have drawn up a tentative list of tasks performed by social

workers in public welfare settings in the various phases of their contact

with clients. The three suggested phases are the "Initial Contact"

(Nos. 1-35), the "Ongoing Contact" (Nos. 36-96), and the "Termination

Contact" (Nos. 97-105). The tasks have been divided in this way for the

sake of clarity, although we realize that some of them are performed during

all phases of social work activity. Please note that many of the tasks

stated in broad terms have been broken down into sub-sections, e.g. No. 12.

The letters (a) _____, (b) _____, and (c) _____

follow each task listed. After (a) each worker participating in this pro-

ject will indicate those tasks that were actually performed by him during

the first week of the study. Those tasks carried out during the second week will be shown after (b). This will assist us in comparing mid-month activities with month-end activities, e.g., to determine in a general way, which tasks are performed more frequently at specific times during the month.

After (c) each worker will indicate those activities which although not carried out during the period of the study, are in fact done at other times during the month (year). This would include tasks of a seasonal nature.

We would suggest that those workers participating in this project complete the attached forms in the following manner:

1. Complete statistical information sheet.

2. Read through the entire list of tasks to be familiar with the whole range of activities suggested.

3. Indicate after (a) or (b) (first week or second week) each day in which a given activity is performed. We would suggest that this be done when a change of activity from one work unit to another occurs. Please note a tally is made each time a task is performed.

4. Indicate (c) which tasks listed and not performed at this time of the month (year) are in fact carried out at other times.

5. Indicate by circling the number of the task any instance where the description given of the tasks is not clear and understandable.

6. Indicate on the blank sheets at back of folder any tasks presently performed that are not included in the list provided.

Thank you for your co-operation.

Office: _____

Caseload: Worker's Position:

  Total: _____   Education: _____

  Total of S.A. Cases: _____   Experience: _____

  Urban: _____   In Public Welfare: ____yrs.

  Rural: _____   Other Social Agencies:____yrs.

TASK RATING INSTRUMENT (List of Tasks)

WORK UNITS

  I.   Initial Contact   (Item 1 - 35)

  II.   Ongoing Contact   (Item 36 - 96)

        A. Administrative Procedures
        B. Community Relationships
        C. Treatment Services

  III.   Termination Contact   (Items 97 - 105)

TALLY INSTRUCTIONS

Place tallies as follows:

    (a) Task performed first week.

    (b) Task performed second week.

    (c) Task performed at other times.

I. Initial Contact

  1.   Accept referral and arrange initial appointment:

      (a) by phone a._____, b._____, c._____

      (b) by letter a._____, b._____, c._____

      (c) in person a._____, b._____, c._____

  2.   Interview to determine financial eligibility. a._____, b._____

      c._____

3. Determine the problem

    (a) presenting a._____, b._____, c._____

    (b) underlying a._____, b._____, c._____

4. Complete application form a._____, b._____, c._____

5. Complete life history - S.W. 82 or equivalent. (Education, work record, health, etc.) a._____, b._____, c._____

6. Determine applicant's ability to handle own problems. a._____, b._____, c._____

7. Evaluate applicant's efforts at solving problem. a._____, b._____, c._____

8. Determine applicant's immediate goals. a._____, b._____, c._____

9. Determine applicant's long range goals. a._____, b._____, c._____

10. Evaluate applicant's strengths. a._____, b._____, c._____

11. Evaluate applicant's weaknesses. a._____, b._____, c._____

12. Determine tentative methods of treatment:

    (a) environment manipulation a._____, b._____, c._____

    (b) support and encouragement a._____, b._____, c._____

    (c) interpretation a._____, b._____, c._____

    (d) other a._____, b._____, c._____

13. Determine what applicant sees agency doing. a._____, b._____, c._____

14. Evaluate feelings, attitudes and needs of applicant. a._____, b._____, c._____

15. Enable applicant to ventilate feelings about situation. a._____, b._____, c._____

16. Explore applicant's motivation for help. a._____, b._____,

    c._____

17. Explore applicant's capacity for help. a._____, b._____,

    c._____

18. Help applicant accept his need for help. a._____, b._____,

    c._____

19. Arrange for immediate referral if necessary, e.g. medical, legal.

    a._____, b._____, c._____

20. Interpret to applicant function of agency. a._____, b._____,

    c._____

21. Interpret policy of agency. a._____, b._____, c._____

22. Interpret to applicant function of intake interview. a._____,

    b._____, c._____

23. Interpret to applicant new social worker will be assigned. a._____,

    b._____, c._____

24. Make referral to another agency or resource if necessary. a._____,

    b._____, c._____

25. Interpret function of referral resource. a._____, b._____,

    c._____

26. Check files for previous contact. a._____, b._____,

    c._____

27. Contact other agencies for previous contacts. a._____, b._____,

    c._____

28. Obtain special information for applicant. e.g. legal, financial.

    a._____, b._____, c._____

29. Provide for transportation if necessary. a._____, b._____,

    c._____

30.   Provide for accommodation if necessary. a._____, b._____,

        c._____

31.   Report back to person or agency making referral. a._____,

        b._____, c._____

32.   Arrange for cheque, enter on grant sheet. a._____, b._____,

        c._____

33.   Complete necessary forms for other services, e.g. vouchers.

        a._____, b._____, c._____

34.   Record interview and make recommendation. a._____, b._____,

        c._____

35.   Make referral to agency worker to carry case. a._____,

        b._____, c._____

II Ongoing Contact

A. Administrative Procedures

36.   Check S.W. 81 (declaration of earnings) for:

        (a) earnings a._____, b._____, c._____

        (b) change of address a._____, b._____, c._____

        (c) other changes in circumstances. a._____, b._____,

            c._____

37.   Noting changes on face sheet. a._____, b._____, c._____

38.   Noting changes on grant sheet. a._____, b._____, c._____

39.   Completing forms for ancillary services, e.g. teeth, glasses, eye

        examinations. a._____, b._____, c._____

40.   Authorizing grants following interview. a._____, b._____,

        c._____

41.   Completing monthly reports or statistics. a._____, b._____,

        c._____

42. Completing expense accounts. a._____, b._____, c._____

43. Organizing work, office routines. a._____, b._____,

c._____

44. Reading policy manual, administrative directives and other material.

a._____, b._____, c._____

45. Work with files e.g. closing reading, B.F. a._____, b._____,

c._____

46. Attending staff meetings, social work institutes, etc. a._____,

b._____, c._____

47. Interviewing collateral for verification of eligibility.

a._____, b._____, c._____

48. Reading and signing incoming and outgoing mail. a._____,

b._____, c._____

49. Writing letters to collaterals to determine clients eligibility.

a._____, b._____, c._____

50. Issuing medical card. a._____, b._____, c._____

B. Community Relationships

51. Medical: accounts, interpretation of service, clarify requests for

service, etc.

(a) Public Health Department a._____, b._____, c._____

(b) Doctors, Dentists, Optometrists, Specialists a._____,

b._____, c._____

(c) Hospitals, clinics a._____, b._____, c._____

52. Legal: arrange referral, confirm court appearances, review evidence

lawyers , legal aid, courts, R.C.M.P., (fraud charges) a._____,

b._____, c._____

53. Schools: confirming attendance, behavior, progress

(a) teachers, counsellors, principals a._____, b._____,

c._____

(b) vocational, special classes, night classes, etc. a._____,

b._____, c._____

54. Financial: confirming credit, consolidating debts, banks, credit

bureaus, insurance companies, finance companies. a._____,

b._____, c._____

55. Service Clubs: provision of extraordinary services (medical, social)

a._____, b._____, c._____

56. Social Agencies:

(a) Community sponsored: re: Housekeeping services, day care

nurseries. a._____, b._____, c._____

(b) Provincial Government sponsored: re: Probation, Rehabilitation

Committee. a._____, b._____, c._____

(c) Federal sponsored: re: Manpower a._____, b._____,

c._____

57. Community Services:

(a) merchants: accounts, provision of merchandise, interpretation

of services. a._____, b._____, c._____

(b) post office: change of address, lost cheque. a._____,

b._____, c._____

(c) Board of Review: prepare report. a._____, b._____,

c._____

(d) Funeral: authorize indigent burials. a._____, b._____,

c._____

(e) Community committees: winter works, boarding home, local

councils. a._____, b._____, c._____

(f) Church groups: young peoples, counselling. a._____,

b._____, c._____

(g) Private groups: Scouts and Guides, Y.M.C.A., Y.W.C.A., Youth camps. a._____, b._____, c._____

58. Interpret agency policy to community resources. a._____, b._____, c._____

59. Provide information on client for other agencies. a._____, b._____, c._____

60. Provide information on other resources for community. a._____, b._____, c._____

61. Try to locate clients. a._____, b._____, c._____

62. Dealing with anonymous telephone calls or letters. a._____, b._____, c._____

63. Dealing with irate citizens over policy or client. a._____, b._____, c._____

64. Recruiting and training volunteers. a._____, b._____, c._____

65. Supervising In-service Trainees. a._____, b._____, c._____

66. Addressing public meeting or community groups on social work. a._____, b._____, c._____

67. Representing Agency at public meeting, radio, television, etc. a._____, b._____, c._____

C. Treatment Services

68. Planning interview with client. a._____, b._____, c._____

69. Identifying the underlying problem, e.g. marital, parent-child, medical, employment. a._____, b._____, c._____

70. Carry out treatment for immediate goals, e.g. cheque. a._____, b._____, c._____

71. Carry out treatment for longer range goals, e.g. interpersonal

relationships. a._____, b._____, c._____

72. Review treatment plans with client. a._____, b._____,

c._____

73. Assess client's strengths. a._____, b._____, c._____

74. Assess client's motivation for help. a._____, b._____,

c._____

75. Assess client's capacity for help. a._____, b._____,

c._____

76. Arrange for referrals, if necessary, e.g. hospitalization, boarding

home. a._____, b._____, c._____

77. Arranging for repatriation. a._____, b._____, c._____

78. Arranging for special ancillary services.

(a) drugs a._____, b._____, c._____

(b) medical care a._____, b._____, c._____

(c) transportation a._____, b._____, c._____

(d) emergency shelter, etc. a._____, b._____, c._____

79. Case consultation - scheduled supervision. a._____, b._____,

c._____

80. Case conference - two or more disciplines (formal, face-to-face).

a._____, b._____, c._____

81. Reading case files. a._____, b._____, c._____

82. Obtaining information for other agencies:

(a) social assessment and planning, e.g. suitability of predischarge

planning. a._____, b._____, c._____

(b) statistical information, e.g. work history from N.E.S.

a._____, b._____, c._____

83. Writing letters to client to involve him in treatment. a._____,

b._____, c._____

84. Setting limits and controls on behavior. a._____, b._____, .

c._____

85. Supporting and reinforcing client at request of other discipline,

e.g. Phychiatrist. a._____, b._____, c._____

86. Deal with feelings about being client. a._____, b._____,

c._____

87. Involve family treatment. a._____, b._____, c._____

88. Involve extended family in treatment. a._____, b._____,

c._____

89. Help client accept his need for help. a._____, b._____,

c._____

90. Interpret ongoing role of worker and agency. a._____,

b._____, c._____

91. Support client in carrying out plans, e.g. taking job. a._____,

b._____, c._____

92. Give advice when necessary and appropriate. a._____, b._____,

c._____

93. Support families of client. a._____, b._____, c._____

94. Recording of assessment and planning. a._____, b._____,

c._____

95. Evaluation of progress. a._____, b._____, c._____

96. Compiling social histories and reports. a._____, b._____,

c._____

III Termination Contact

97. Review reason for coming to agency. e.g. problem. a._____,

b._____, c._____

98. Review long-range goals with client. a._____, b._____,

c._____

99. Evaluate treatment with client. a._____, b._____,

   c._____

100. Clarify with client reasons for termination. a._____, ...

   b._____, c._____

101. Support client in leaving agency. a._____, b._____,

   c._____

102. Reassure client that help is always available. a._____,

   b._____, c._____

103. Report back to original referrant. a._____, b._____,

   c._____

104. Carry out administrative procedures:

   (a) cancel medical card. a._____, b._____, c._____

   (b) cancel financial grant. a._____, b._____,

      c._____

   (c) enter necessary notation on file a._____, b._____,

      c._____

   (d) record and close file a._____, b._____, c._____

APPENDIX B

INSTRUCTIONS FOR RATING

The enclosed list of tasks should be rated from 1 to 5
depending on the amount of social worker autonomy required in the com-
pletion of them in the granting of social allowance.

For the purposes of this project, the concept of autonomy has
been designated by a five point rating scale for the purposes of rating
the tasks. Tasks of a completely objective nature are to be rated at
"1" as opposed to those tasks of a completely subjective nature to be
rated at "5". Objective tasks are defined as those primarily concrete
acts dealing with the physical needs of a client as opposed to those of a
psychological nature. Subjective tasks are defined as primarily those
dealing with psychological and emotional needs of a client.

Social work has both organizational (outer) controls and
professional (inner) controls. The concept of worker autonomy refers to
the degree to which the worker is called upon to function autonomously, i.e.,
depending on his "acquired" professional controls. Inherent in his
concept are the three facts that:

(1) many social work tasks are not spelled out in
 a book of regulations.

(2) casework is almost invariably closed to direct
observation.

(3) some agency settings provide a greater or
lesser organizational support for social work
principles.

The following guide lines are provided to assist you in rating

the tasks in order to determine the degree of autonomy required:

(1) Tasks requiring little or no autonomy: (purely objective)

Simple and concrete activities that relate specifically to the immediate and tangible which are set down in the form of rules and regulations and which require little if any relationship in their performance. No need to apply independent judgment based on general principles of social work theory and practice. e.g., driving client to doctor.

(2) Objective but requiring decisions:

Specific and concrete tasks requiring some independent judgment in the use of policy and regulations. Tasks still related to the immediate and tangible. No risk involved in the making of decisions. e.g., issuing form for emergency medicine.

(3) Objective and Subjective:

Judgment required in decision made taking into consideration the objective, and to a lesser extent subjective factors for the purpose of determining client needs. Use of relationship in reality focussed situations requiring environmental manipulation. e.g., deciding whether to recommend that a family of 10 in receipt of social allowance at rate of Unit 7, have their unit increased.

(4) Subjective and Objective:

Judgment required in the use of policy based on an assessment of both objective and subjective factors in the client situation. Purposeful use of relationship in treatment but limited to the use of supportive skills and techniques. There is less visibility with regard to the handling of subjective factors.

(5) Tasks requiring greatest degree of autonomy: (subjective)

Working within the framework of agency policy, complete freedom of activity and decision making with regard to the client's total situation. Full use of professional skills and techniques in assessment and treatment, with controls emanating from professional practice.

NOTE:

        Rate the tasks at the lowest level of autonomy only.

        For example, where a task requires a worker autonomy

        of "2", indicate a "2" after the task and not 2, 3,

        4, 5.

        Thank you for your co-operation.

APPENDIX C

		RATING
A.	INITIAL CONTACT	

1. Accept referral for interview:

    a.   by phone;   _____

    b.   by letter;   _____

    c.   in person.   _____

2.   a.   Identify the presenting problem;   _____

    b.   Assess the presenting problem.   _____

3. Identify the underlying problem.   _____

4. Complete application form.   _____

5.   a.   Complete life history - S.W. 82 or equivalent

        (Education, work record, health, etc.);   _____

    b.   Assess life history information.   _____

6. Assess applicant's ability to handle own problems.   _____

7. Assess applicant's efforts at solving problem.   _____

8. Assess applicant's immediate needs.   _____

9. Assess applicant's long range goals.   _____

10. Assess applicant's strengths.   _____

11. Assess applicant's weaknesses.   _____

12. Determine total treatment plan (e.g. environmental

manipulation, support, etc.)   _____

13. Assess applicant's view of the agency.   _____

14. Explain function and/or policy of the agency.   _____

15. Assess feelings, attitudes, and needs of applicant.   _____

16. Assess applicant's need to ventilate feelings about

situation.   _____

17. Assess applicant's motivation for help.   _____

18. Assess applicant's capacity for help. _____

19. Purposefully helping applicant accept his need for help. _____

20. a. Assess need for immediate referral (e.g. medical,

   legal); _____

   b. Complete arrangements for immediate referral. _____

21. Interpret to applicant function of intake interview. _____

22. Interpret to applicant new social worker will be assigned. _____

23. Interpret reason for referral. _____

24. Check files:

   a. for previous contact; _____

   b. for assessment information. _____

25. Contact other agencies:

   a. for previous treatment contacts; _____

   b. for verification of finances, employability, etc. _____

26. Provide information for applicant re: other resources,

   e.g. legal aid, credit bureau, etc. _____

27. Assess need for transportation. _____

28. Complete arrangements for transportation. _____

29. Assess need for accommodation. _____

30. Complete arrangements for accommodation. _____

31. Contact person or agency making referral:

   a. to report service rendered; _____

   b. to provide evaluation or assessment. _____

32. Complete necessary forms for services, e.g. vouchers,

   cheques. _____

33. Assess case to determine who in office should carry it. _____

B.   ONGOING CONTACT   RATING

    I.   ADMINISTRATIVE PROCEDURES

34.   Check S.W. 81 (declaration of earnings) for changes in

    financial or other circumstances.   _____

35.   Note changes on face sheet.   _____

36.   Note changes in grant on grant sheet.   _____

37.   Assess eligibility for ancillary services, e.g. teeth,

    glasses, eye examinations.   _____

38.   Complete forms for provision of ancillary services.   _____

39.   Assess eligibility for medical card.   _____

40.   Complete procedures for issuing medical card.   _____

41.   Contact post office re: lost cheque or change of address _____

42.   Try to locate clients.   _____

43.   Complete report for Board of Review.   _____

44.   a.   Assess need for repatriation;   _____

    b.   Complete arrangements for repatriation.   _____

    II.   COMMUNITY RELATIONSHIPS

45.   Interpretation of agency function and/or policy to community

    resources:

    a.   Medical (doctors, hospitals);   _____

    b.   Legal;   _____

    c.   Financial (credit bureaus, finance companies);   _____

    d.   Service Clubs;   _____

    e.   Social Agencies (Public Health, Manpower);   _____

    f.   Religious (ministers, etc.).   _____

46. Request service not provided by agency from other

    sources:

    a.   Legal (legal aid);

    b.   School (counselling service);   _____

    c.   Financial (consolidating debts);   _____

    d.   Service Clubs (transportation);   _____

    e.   Social Agencies (Public Health, homemaker);   _____

    f.   Religious (counselling by Minister).   _____

47. Provide information on social resources (i.e. group homes,

    mental health clinics, etc.) for community groups.   _____

48. Dealing with anonymous information coming into the agency

    re clients by:

    a.   phone;   _____

    b.   letter;   _____

    c.   in person;   _____

49. Dealing with private inquiries about individual clients.   _____

50. Addressing public meetings or community groups on social

    work.   _____

51. Representing Agency at public meeting, radio, television,

    etc.   _____

III. TREATMENT SERVICES

52. Assessing the client's underlying problems, e.g. marital,

    parent-child, employment.   _____

53. Complete measures to meet immediate needs, e.g. cheque.   _____

54. Carry out treatment for long range goals, e.g. interpersonal

    relationships.   _____

55. Evaluate ongoing treatment plans with the client.   _____

56. Assess client's strengths.   _____

RATING

57. Assess client's motivation for help. _____

58. Assess client's capacity for help. _____

59. Representing Agency at Case conferences - two or more

disciplines (formal, face-to-face). _____

60. Provide information for other agencies:

a. social assessment and planning, e.g. suitability

of predishcarge planning; _____

b. statistical information, e.g. work history from N.E.S. _____

61. Purposeful setting of limits and controls on client's

behaviour. _____

62. Advising client of limits and controls as established in

agency policy. _____

63. Purposeful support of client at request of other discipline,

e.g. Psychiatrist. _____

64. Help client work through feelings of being a client. _____

65. Involve family in treatment. _____

66. Involve extended family in treatment. _____

67. Help client accept his need for treatment. _____

68. Purposeful support of client in carrying out his plans,

e.g. taking job. _____

69. Purposeful giving of advice when necessary and appropriate. _____

70. Purposeful support of families of client. _____

71. Recording of assessment and treatment planning. _____

C. TERMINATION CONTACT

72. Evaluate treatment in terms of long range goals with client. _____

73. Evaluate help given to meet short range needs. _____

74. Clarify with client reasons for termination. _____

75. Purposeful support of client in leaving agency. _____

76. Purposeful reassurance of client that help is always

    available. _____

77. Carry out administrative procedures upon termination of

    case.   e.g. cancel medical card or grant. _____

78. Record closing summary. _____