



CalSWEC Aging Initiative

Progress Report
February 2005



Executive Summary

Demographic Challenges and Opportunities

Dramatic growth is projected for the aging population in California over the next 40 years. The “graying” of California poses significant challenges to the state’s economy, infrastructure, housing and transportation systems, health and human services, and a host of public and private concerns. Principles established by policy makers are outlined for priority setting and values that guide geriatric social work.

Social Work Education Response to the “Demographic Imperative”

The social worker shortage and shortcomings in higher education in gerontology are recognized by advocates and academics. Expansion of geriatric social work education and training efforts launched by the John A. Hartford and Archstone Foundation serve as a catalyst to address this issue and serves as a model for building capacity and enhancing awareness.

A Model for Social Worker Practitioner Preparation

The California Social Work Education Center (CaSWEC) is a nationally recognized model for social work education and training. This unique collaboration has led to the training of over 2000 professional social workers in the field of Child Welfare services. The CaSWEC leadership has committed its experience, expertise and unique partnerships to replicating its success to social work workforce development for aging.

CaSWEC Aging Initiative

The Aging Initiative was launched with the goal of creating a statewide coalition of key stakeholders representing the academic community and providers from the public and private sectors. The vision for the group was to develop a statewide plan with specific strategies to address the need for building the training and education capacity, creating incentives for attracting students, and improving the diversity of the workforce.

Aging Initiative Strategic Priorities and Outcomes

The Aging Initiative established four **strategic priorities**. Specific first year accomplishments are outlined:

1. Create a Statewide Coalition to promote Social Work Workforce Development in Aging:
 - Development of a database of 305 leaders and experts
 - Convened first Aging Summit on October 21 and 22 attended by 109 invited delegates
 - Developed consensus in four key areas: Image, Funding, Curriculum, and Workforce
 - Distributed 200 Summit participant manuals

2. Development of Core Competencies in Geriatric Social Work:
 - Identified “Best Practice” models of geriatric social work education and training in California
 - Compare existing competencies within geriatric social work education and practice
3. Develop Workforce Development Strategies:
 - Identification of gaps in descriptive and evaluation research on social work labor force, job market, wages, standards, practices and requirements for social workers in the field of aging
 - Begin development of methodology to fill the gaps
4. Develop Capacity Building and Sustainability Strategies:
 - Presentation of Aging Initiative to Foundation Officers/Boards and Policy Makers
 - Developed cost proposals based on a cohort of 400 new students

First Year Summary of Accomplishments

A brief summary of each Workgroups’ activities and accomplishments with next steps are outlined for each work group.

Aging Summit Planning Committee

The Workgroup expanded its partnerships and planned and organized the first ever statewide Aging Summit on October 21 and 22. This effort brought together 109 delegates, established a database of 305 key stakeholders and resources in the field of aging, presented successful models for training, and developed consensus in key areas to further the Aging Initiative.

Next Steps:

- Analyze and synthesize the Summit materials and prepare a Summit Report
- Create a report that will reflect the vision, values, and goals of the participants and the historical foundations that led to the Summit

Workforce Development Workgroup

This Workgroup identified the problems of insufficient data and research to inform strategies in workforce development. Summit participants also identified concerns with the image of the profession in aging and promoting a “pipeline” for new workers into the system by implementing the “ladder of learning” identified in the Master Plan for Social Work Education.

Next Steps:

- Foster public/private collaboration to ensure implementation of the Master Plan

- Support efforts to promote the image of social workers in aging; survey all accredited schools for critical data regarding: aging content or expertise in curriculum, placements, faculty, capacity and plans
- Workforce surveys with employers to collect data on wages, vacancy rates, cost and related labor market information

Curriculum Workgroup

The Workgroup reviewed various curriculum models and will move forward with the development of a viable set of geriatric social work competencies as the basis for curriculum development.

Next Steps:

- Convene an expanded Curriculum Workgroup for input and refinement of competencies
- Draft competencies and conduct an extensive review and input process with the goal of presenting a final draft for review by the CalSWEC Board by May 2005
- Promote dissemination and implementation of gerontological social work competencies through the academic Policy and Accreditation infrastructure throughout California

Capacity Development and Sustainability

This Workgroup's stated purpose is to develop the funding to implement the Aging Initiative. Key strategies include funding support for student stipends, field instruction, and faculty hiring and training. Various funding streams have been explored for short and long term possibilities.

Next Steps:

- Develop budget and funding requirements for a first cohort of 400 students
- Develop funding strategies that leverage and blend funds from different sources
- Seek foundation support for the Aging Initiative's infrastructure and work plans
- Develop long term strategies targeting training funds from Medicaid, and legislation to support training in geriatric social work

Demographic Challenges and Opportunities

Over the past twenty years much has been discussed, studied, and written about the “graying of America”. But relatively little has been done to prepare for the age wave that confronts the nation and California in particular. People are living longer today due to improvements in medicine, technology, and healthier lifestyles. The U.S. median age shifted from 28 in 1970 to 36 in 1999.¹ This demographic trend is expected to continue; especially as the “Baby Boom” generation (individuals born in the U.S. from 1946 to 1964) moves into older adulthood. The first of this cohort will turn age 60 in 2006. In 2000, 13% of the population was age 65 or older. By 2030, an estimated 20% of the U.S. population will be age 65 or older.² The greatest increase is expected in what experts refer to as the “old-old” or those persons 85 and older. This group understandably has the highest comparative incidence of dependency and disability.³

The older adult population is also becoming more racially and ethnically diverse, with Hispanic, African American, and Asian populations growing at more rapid rates than older Caucasians. The diversity of older adults extends to other life experiences and orientations, with growing numbers of older adults being immigrants, refugees, persons with developmental disabilities, adults living alone, adults in domestic partnerships and incarcerated elders.

California, with 3.5 million adults age 65 or older, has the largest older adult population in the nation. This figure is projected to increase more than 172% over the next 40 years, with most of the growth occurring between 2010 and 2030 as more Baby Boomers enter retirement age. Californians ages 85 and older are projected to increase over 200% through 2040.⁴

Except for Hawaii, California is the most racially and ethnically diverse state in the nation. California leads the nation in the number and percentage of older recent immigrants, the majority of which are of Latino, Asian, or Pacific Island origin. Recent immigrants are more likely to be socially and economically disadvantaged as compared to native-born U.S. residents. These disadvantages are often cumulative and affect immigrants’ health status, access to care services and providers, and social, psycho-emotional, and economic well being into old age.⁵

These factors combine to create what we reference as a “demographic imperative”. In 1999, the California State Legislature enacted Senate Bill 910 mandating that the California Health and Human Services Agencies address impending demographic, economic, and social changes triggered by the state’s aging and diverse populations. On May 24, 2004, the Assembly Committee on Aging and Long-Term Care released *Planning for an Aging California Population: Preparing for the “Aging Baby Boomers”*, prepared by the California Strategic Plan on Aging Advisory Committee and developed in conjunction with the California Policy Research Center (CPRC).⁶ CPRC researchers noted California had a 10-year “window of opportunity” before the first Baby Boomers turn age 65,

“...to prepare for the changes that will affect virtually every aspect of life: economic growth, housing and transportation systems, geographic and land-use planning needs, health and social services, and a host of public and private-sector concerns.”⁷

The Assembly Committee on Aging and Long-Term Care identified five guiding principles for establishing priorities and direction for the development of an Aging Agenda for the 21st Century:

1. Consumer and family-focused policy approach
2. Options for independence

3. Systems change that maximizes participation from consumers and families
4. Access to services from a seamless system of care
5. Consumer and family empowerment and advocacy

These five principles are intended to guide public policy planning. We observe that these principles align with the practice of geriatric social work, which is defined as professionally responsible intervention to:

1. Enhance the developmental, problem solving, and coping capacities of older people and their families
2. Promote the effective and humane operating of systems that provide resources and services to older people and their families
3. Link older people with systems that provide them with resources, services, and opportunities
4. Contribute to the development and improvement of social policies that support persons throughout the lifespan

Legislative policy makers underscored the importance of the field of social work in meeting these challenges in May 2002 with the adoption of Assembly Concurrent Resolution No. 215 (AR-215). The resolution required the preparation of a “master plan” for social work education be developed by 2004 that “addresses the state’s shortage of social workers and reflects the state’s diverse population”. The “master plan” submitted to the California State Legislature in response to AR-215 is referenced throughout this report.

If social services are one of the legislatively forecast high demand needs of aging Californians, and the principles of social work profession practice are consistent with meeting those needs, what then is the capacity of the field of social work to respond?

Social Work Education Response to the “Demographic Imperative”

Social workers provide clinical, social, and case management services to individuals, families, and communities. They work with older adults, their family members and other service providers to optimize elders’ independence and well being. They also facilitate systems-level change in their roles as administrators, advocates, and policy analysts.⁸ In sum, social workers are uniquely qualified to meet the challenges and opportunities inherent to our rapidly increasing aging population. Unfortunately, there is a significant shortage of social workers prepared to take up the work.

In 1987, fewer than 30,000 U.S. social workers were working full or part-time with the elderly. By 2010, when the first wave of Baby Boomers reach retirement age, there will be a need for an estimated 60,000 to 70,000 social workers.⁹ The July 2004 “Master Plan for Social Work Education” reported 2,400 MSW and 1,700 BSW students are enrolled annually in California social work schools and programs. Based on conservative estimates, this leaves a current annual shortfall of 15,200 social worker graduates.¹⁰ The Bureau of Labor Statistics projects that the demand for geriatric social workers will increase by 39% over the next decade.¹¹

In 1997, Damron-Rodriguez and colleagues reported that there were fewer MSW programs in the nation than there were ten years earlier.¹² Social work has few full-time gerontological social work trainees in field practica. Social work educators reported that programs were losing interested faculty “due to a lack of grant support for aging-related programs.”¹³ Lack of trainee funding for first year Master of Social Work (MSW) placements was identified as the primary reason.

There are also troubling indicators that current social work education and training is inadequate to meet the needs of an aging constituency. Results from the National Association of Social Workers (NASW) survey during 2000 indicated that 62% of survey respondents worked in some capacity with older adults but had not been trained to do so.¹⁴ These respondents also indicated their need/interest for more aging knowledge. The majority of BSW and MSW educational programs provide little or no direct infused gerontology content. Nationally, only 2.7% or 938 students of the nearly 35,000 students pursuing social

work degrees select an aging concentration. Even more disconcerting is that of the remaining 97% of students, fewer than 2% take any courses in aging during their graduate education.

Few government or philanthropic organizations have acted to address this gap. Recognizing this unmet need, the John A. Hartford Foundation has provided leadership and a financial commitment of \$24 million (since 1998) to fund programs designed to strengthen geriatric social work education and prepare aging-savvy social workers for practice with older adults and their families. Hartford Foundation initiatives include the Faculty Scholars Program, the Practicum Development project, the Doctoral Fellows program, and the Council of Social Work Education/SAGE-SW project. These initiatives have strong links to public and nonprofit community-based organizations. California social work schools and programs are well represented within the network of Hartford Geriatric Social Work Initiative projects (see Appendix A). Hartford’s commitment has demonstrated how the academic and practice areas of social work can focus for results with geriatric populations.

A Model for Social Work Practitioner Preparation

Since 1990, the California Social Work Education Center (CalSWEC) has served as a catalyst, convener, and partner to increase the number and quality of social workers in California. CalSWEC was developed to meet the significant shortfall in the number of social workers prepared to work with children and their families in public Child Welfare programs. CalSWEC championed social work curriculum and field experience integration, and the development of resources that enable a learning and career “ladder” for social work graduates in public child welfare agencies.

CalSWEC is composed of 17 schools of social work, the California County Welfare Directors and the California Mental Health Directors Association. Other CalSWEC partners include the California Department of Social Services, the California Chapter of the National Association of Social Workers and private foundations. The work of CalSWEC includes the development of statewide competencies for child welfare, research initiatives to advance best practices in child welfare, recruitment strategies to enlist students that reflect the diversity of children served, and a program of stipends for student. The stipends are provided contingent upon the students agreeing to focus their classroom and field instruction in child welfare. Upon graduation the student further agrees to engage in public child welfare practice for a period commensurate with the level of financial support received (typically 2-3 years).

The CalSWEC partnership has been successful in increasing the number and quality of social workers trained in child welfare and employed in public agencies. Using a two-pronged approach of skill infusion and specialization, the CalSWEC statewide partnership has produced over 2,000 Masters level social

workers that have entered public agency child welfare employment since 1990. An eight year follow-up survey finds that 65 to 85 percent of stipend assisted graduates remain employed in public child welfare even after their “payback” period of employment is completed. CalSWEC has also been successful in improving the diversity of the child welfare workforce by recruiting and enrolling students from diverse ethnic backgrounds. In the 2002-2004 school year, 66% of the MSW graduates were persons of color.

The CalSWEC Board of Directors recognized the significant unmet need for similar social work education, training, and employment opportunities for social workers serving aged adults and their families. The CalSWEC Board of Directors established the Aging Initiative in February 2004 under the auspices of the CalSWEC Curriculum Committee. The intent of the Aging Initiative is to build upon successes and lessons learned through the CalSWEC Child Welfare initiative, and apply them to building the capacity for workforce development in geriatric social work.

CalSWEC Aging Initiative

The goal of the Aging Initiative (AI) is to form a statewide coalition of major stakeholders to create a vision for workforce development for social work to aging individuals and their families in California. The Aging Initiative is a 30-person group (see Appendix D). The group has balanced representation of leaders from schools of social work, county social service agencies and private non-profit organizations. Aging Initiative members are representative of the ethnic and geographic diversity of the state.

Working in conjunction with the CalSWEC Board and Curriculum Committee, Aging Initiative leaders developed a start-up and general action plan, which included securing staff and funds to support first-year planning and implementation activities. Considerable “in-kind” and travel related financial support has been provided by the member organizations of the Initiative.

Members quickly organized themselves into four Workgroups as a means to plan and implement activities associated with identified strategic priorities. These subgroups include: Aging Summit Planning; Curriculum Development; Workforce Development; and Capacity Development and Sustainability. Each Workgroup has two “leads” from academic and social service organizations. The “Workgroup leads” facilitate their group. Frequency of subgroup meetings varied from monthly to weekly, depending on the tasks to be accomplished.

Aging Initiative Strategic Priorities and Outcomes

The Aging Initiative established four Strategic Priorities for 2004 and beyond. Progress on these Strategic Priorities was accomplished primarily through the four Workgroups with active, hands-on involvement of Workgroup members and paid and in-kind staff support. Details regarding the Workgroups’ first year activities appear later in this report. Aging Initiative Strategic Priorities and Outcomes are summarized below:

1. **Create a statewide coalition to promote social work workforce development in Aging:** One of the priorities of the Aging Initiative (AI) is to provide a communication network and forum to engage decision makers, schools of social work, social services organizations, other professionals, and consumers to develop consensus and cohesive strategies for geriatric social work education and practice. Substantial progress in this area was made during 2004 through the efforts of the AI members led by the Summit Workgroup. Outcomes include:

- Securing significant financial and in-kind support of the CalSWEC Aging Summit from members, partners, and funders including: California Geriatric Education Center (\$10,900); Archstone Foundation (\$15,000); California Welfare Directors Association (\$25,000); and the Motion Picture and Television Fund (\$1,500). Additionally, California State University at Long Beach provided significant “in-kind” donation for the Initiative by providing conference facilities and administrative oversight.
- Developed a database, coded by discipline, of 305 leaders and experts concerned with aging/social work issues
- Convened the first Aging Summit on October 21 and 22, 2004 attended by 109 Delegates
- Developed and distributed nearly 200 Aging Summit participant manuals
- Development of consensus among Summit participants regarding priorities in four key areas: Image, Curriculum, Workforce and Funding
- Identification of “next steps” to address each of the key priority areas

2. **Development of Core Competencies in Geriatric Social Work:** Geriatric social work education and training is a priority area. The major goals for this area are the identification and development of core competencies for professional geriatric social work, development of graduate level curriculum in geriatric social work practice, and development of training curriculum in order to “re-professionalize” existing social work practice towards evidence-based practices. Led by the Curriculum Workgroup, progress towards these goals includes the following:

- Identified the “Best Practice” models of geriatric social work education and training in California (Hartford funded projects and others)
- Began the process to identify and compare existing competencies within geriatric social work education and practice, mental health and child social welfare as a basis to developing a standardized set of core competencies for geriatric social work
- Promoted Schools of Social Work participation in the Hartford Foundation faculty development initiative in geriatric social work Curriculum Development Institute (CDI)

3. **Development of Workforce Development Strategies:** Another key priority area is being addressed through the leadership of the Workforce Workgroup. A major goal within this priority is the development of a career and educational “ladder” from high school to doctoral level to attract, develop and retain high quality geriatric social work practitioners and leaders. This goal is aligned with the Social Work Master Plan. A further goal is the development of a social work workforce that reflects the socio-economic status, age, cultural, ethnic, and linguistic diversity of the older adult population. Progress in this area includes:

- Identification of gaps in descriptive and evaluation research on social work labor force, job market, wages, pay scales and standards, practices, and requirements for social workers in the field of aging
- Development of methodology to fill the above information gaps

4. **Capacity Building and Sustainability:** The prime goal in this area is to develop and implement a funding plan to support the cost centers relative to the CalSWEC Aging Initiative including student stipends, field instruction, classroom instruction and other Aging Initiative infrastructure. The Capacity Development and Sustainability Workgroup progress includes:
- Presented the work of the Aging Initiative to foundation and policy-setting decision-makers (Invitational luncheon with Hartford Foundation Program Officer to refine the Foundation's geriatric social work strategies and Hartford Foundation Trustees' annual meeting (May 2004)
 - Developed estimate of annual cost to support 400 students from 10 social work programs in a stipend program for academic year 2006-2007
 - Arranged for revenue strategy consultation

The joint efforts of the four Workgroups have produced favorable progress that moves the Aging Initiative forward. Each priority area highlighted above is covered in greater detail in each of the Workgroup reports that follow. Included in each report are the planned next steps for the realization of the overarching CalSWEC Aging Initiative goal of developing a workforce of social workers equipped to meet the service needs of the burgeoning population of older adults and their families.

First Year Summary

Aging Summit Planning Committee

This Workgroup was engaged in planning, developing, and conducting the first ever statewide Aging Summit, on October 21 and 22, 2004. The Aging Summit was made possible through a collaborative partnership with CalSWEC, the Archstone Foundation, the California Geriatric Education Center, the California Welfare Directors Association (CWDA), the Motion Picture and Television Fund, and California State University Long Beach (host university).

The goal of the Aging Summit was to serve as a catalyst for the creation of a statewide coalition to create and sustain an action plan for the development of a social worker workforce to serve older persons. One hundred and nine leaders from across the state participated representing government, social work education and research, philanthropy, aging, social services, health care services and policy makers.

The first objective of the Summit was to identify the constituency for accomplishing the goals of the CalSWEC Aging Initiative. In addition to the 109 invited participants, a product of the Summit is the database of 305 key persons from Northern, Central and Southern California identified by nine different fields of representation. The Summit provided a means to increase awareness and interest of this issue onto a broader platform with a larger multi-disciplinary constituency.

A second objective of the Summit was to present and showcase model California social work education programs previously funded by the Archstone and John A. Hartford Foundations. This was accomplished by resources from the Practicum Partnership Programs (PPP) in Southern California (Geriatric Social Work Education Consortium) and Northern California (Consortium for Social Work Training in Aging). The seven GeroRich projects were presented. Educational resources and strategies were identified to move forward with a California Model of Geriatric Social Work Education. The PPP competencies were identified as a foundation for CalSWEC Aging Competencies.

An important byproduct of the Summit was the opportunity to encourage California social work schools and programs without GeroRich programs to apply to participate as a region in geriatric social work Curriculum Development Institute (CDI). This newly funded Hartford Foundation faculty development initiative, coordinated through the Council on Social Work Education (CSWE), builds upon the success of the GeroRich projects. If approved, California will be the only state in the nation to receive such designation. The CalSWEC Aging Initiative served as a galvanizing force to mobilize eligible schools to apply. Ninety-percent or 10 of the 11 eligible schools applied to participate in the CDI. We are awaiting results of the proposal reviews.

A third objective was to build foundations for the development of an infrastructure for sustaining the CalSWEC Aging Initiative. The Summit provided a means for the newly formed Aging Initiative to build a network of supporters. The Summit served as a springboard for the CalSWEC Aging Initiative Workgroups to formulate specific goals and strategies for action.

The fourth objective was to engage in a consensus-building process with Summit delegates to develop a vision, mission, and priorities for continued mobilization of action directed toward the building of the educational and training capacity for a geriatric social work workforce. The Summit Workgroup process was rated favorably by participants. Summit delegates and Aging Initiative members engaged in a modified Delphi technique to brainstorm solutions as well as to prioritize objectives. The U.S. Bureau of Health Professions “Matrix for Geriatric Social Work” was used as a template. Participants made valuable contributions as facilitators, recorders, and curricula experts. Informal reports and Summit evaluations suggest that it was an enormous success.

Next Steps:

1. There is a substantial amount of material that has been compiled, which will be analyzed, synthesized, and disseminated to stakeholders in the form of a Summit Report and Recommendations. Sources of Summit information include: day one goal lists; day two priorities lists; day two action steps and outcomes; final individual votes; and individual action plans.
2. The Summit Report and Recommendations are being compiled as a statement of vision, mission, and goals. Principles underlying the Aging Initiative, which have been developed over the past decade, will guide the report, including:
 - University/community collaboration, and competency-driven education
 - Building on the infrastructure established by CalSWEC to professionalize agency service and produce well-prepared social workers
 - Dissemination of competencies and “best practices”, using current materials and resources developed in California for aging content infusion as well as specialized university curriculums
 - Education in the policy arena to further the agenda for an aging California

Workforce Development Workgroup

Progress in the area of geriatric social work workforce development is presently hampered by the lack of sufficient data and research to inform strategies and measure outcomes. The Workforce Development Workgroup noted in particular the significant lack of existing descriptive and evaluation research on social work labor force, job market, wages and pay scales, and standards and practices regarding

experience on education, licensing, and job requirements for social workers in the field of aging. Of the relatively few studies that do exist, the vast majority focus on gerontological curricula, practice models, professional competencies, and student characteristics. But even this research needs updating and expansion, with a focus on California's social work workforce.

Accurate, current data are needed from California social work schools and programs to gauge the extent of gerontological content and structure, as well as student and faculty characteristics and numbers. Additionally, primary data collection from public and nonprofit entities that provide services to older adults will be needed to estimate congruence between the supply and demand of geriatrically-prepared, skilled social workers and employment opportunities. Combined, this research may be used to inform strategies for student recruitment, student and faculty development, continuing educational opportunities, capacity development and sustainability, policy-setting, and future research.

Next Steps:

Based upon results from the Aging Summit, the Workforce Development Workgroup will achieve the following high-priority goals for 2005 and beyond by:

1. Fostering a public/private collaboration that facilitates implementation of the Master Plan for Social Work Education in California and development of the "ladder of learning" framework designed to expand the number of social workers in the State of California
2. Promoting a positive image of elders' current and projected service needs, as well as the image of the social work profession

These goals will be accomplished by developing and implementing a two-phase project.

Phase I:

Working in conjunction with other CalSWEC Aging Initiative Workgroups and the CalSWEC Mental Health Initiative, develop a survey of all accredited schools of MSW/BSW social work programs to inquire about:

- Curriculum structure (e.g., concentration of specialized courses; certificate in aging)
- Number/level of graduates/graduation rates ("counting heads")
- Number of specialized field placements
- Number of faculty trained in gerontology
- Ability of schools to expand their aging content/program(s)
- Any planned aging specific programs "in the pipeline"

Phase II:

Working in conjunction with California Welfare Directors Association (CWDA), develop a methodology and design for a second survey of Adult Protective Services (APS) and In-Home Supportive Services (IHSS) to inquire about:

- Salaries, vacancy rates, and other job/labor force characteristics
- Program costs and resources that influence organizations' service provision
- Other labor market information as identified

The Workforce Development Workgroup will work in conjunction with other CalSWEC Aging and Mental Health Initiative Workgroups, and strategic partners (i.e., CWDA) to develop and implement the surveys, compile and analyze survey results, and provide oral and written reports to stakeholders. Additionally, the Workforce Development Workgroup and partners will review, analyze, and compare results from CalSWEC Phase I and II surveys with the NASW national and California-specific social work labor force surveys.

Thereafter, this information will be used to develop an action plan to implement and fund the career and educational ladder described in the Master Plan for Social Work Education in California. Resources and dedicated staff/student research time will be needed to conduct a multi-disciplinary literature search of studies, methodologies, and models relating to workforce imbalances.

Curriculum Workgroup: Building Upon Successes

There was significant overlap and synergy between the membership and activities of the Curriculum Workgroup and the Aging Summit Planning Committee. This helped to ensure that the Aging Summit presentations and materials highlighted best practice models of geriatric/gerontological social work education and training in California. Momentum gained from Aging Summit have and will continue to inform the activities of the Curriculum Workgroup to achieve their goal: To develop and disseminate competency-based geriatric/gerontological social work curriculum throughout California.

Background on Development of Competencies:

A key theme that emerged from the Aging Summit was to build upon successes achieved thus far in the area of curricular innovations and professional competencies. Significant progress over the past several years has been made in the development of geriatric social work competencies.

During the late 1990's, sets of professional competencies for social work practice in aging were developed simultaneously by the Geriatric Social Work Education Consortium (GSWEC), and the Council on Social Work Education (CSWE) through different consensus building processes. GSWEC developed competencies through literature review and a focus group process. The Council on Social Work Education's SAGE-SW project developed competencies from a literature review and expert opinion. These sets were reviewed and synthesized for content relevant to the educational content of the Practicum Partnership Program (PPP), a graduate social work education demonstration focused on aging. They were then matched against sets of competencies developed by five other sites of the PPP and additional competencies were identified. These and new items with macro, interdisciplinary, and research and evaluation content were then grouped into domains. This was followed by a series of reviews of items for clarity and validity by members of the Evaluation Committee of the PPP, who are experts in social work and aging.

As a result of these reviews and pilot testing, some items were modified, others deleted, and new items developed. These competencies were developed into skill statements to create the PPP Geriatric Social Work Competency Scale, which was revised (2003-2004) after pilot use with 226 graduate social work students. The purpose of the scale is to measure the degree of skill competency of social work students and practitioners specializing in aging, in practice with older adults and their families. The PPP Geriatric Social Work Competency Scale II is a 38-item instrument that is divided into four domains: Values and Ethics, Assessment, Intervention, Aging Services, Programs and Policies. The instrument has considerable face validity, and is currently being tested for reliability. Recently, the PPP Geriatric Social Work Competency Scale II was adopted by CSWE National Center on Gerontological Social Work Education (Gero-Ed) as one of the evaluation tools for Curriculum Development Institutes.

The substantial research, analysis and consensus-building activity that went into the development and testing of the PPP Geriatric Social Work Competency Scale II provides a solid foundation from which to build a standardized set of professional social work competencies for geriatric social work training and education in California and the U.S. However, additional analysis and consensus-building activity involving all stakeholders will be necessary to expand, refine and finalize these competencies. Through this process, stakeholders may also address what constitutes “evidence-based social work practices” for older adult populations. Additionally, the resulting competencies will need to be relevant and feasible within diverse academic and field settings—more so than for child welfare, given the wide array of aging service settings and organizations. These are opportunities to improve understanding and create synergy within aging and social service organizations through a competency development process. The Curriculum Workgroup also recognized opportunities to create synergy and consistency of competencies, curriculum and training across CalSWEC aging, mental health and child welfare initiatives.

Aging Initiative Curriculum Workgroup members believe that obtaining input and buy-in from stakeholders (i.e., Deans and Directors of Social Work Schools, CWDA, and Aging Summit participants) is critical to the development of viable geriatric/gerontological social work professional competencies. Resources, time and effort will be needed to facilitate this consensus-building process. The attached competencies are provided as a framework from which to complete this process during 2005 (see Appendix B).

Next Steps:

1. Convene an expanded Curriculum Workgroup to ensure representation and input from key stakeholder groups/organizations
2. Review and refine the PPP Geriatric Social Work Competencies for relevance and application across a variety of academic and practice environments
3. Draft competencies in geriatric social work based on the synthesis of existing geriatric/gerontological social work initiatives in California and disseminate widely for comment
4. Produce draft final geriatric/gerontological social work competencies for CalSWEC Board action in May 2005 (Older Americans Month)

5. Publicize availability and distribute finalized competencies widely through CalSWEC, Aging Initiative, Aging Summit participant organizations, and other aging and social work organizations'/networks' communication channels
6. Work in partnership with the Council on Social Work Education (CSWE) National Center for Gerontological Social Work Education and other national and state organizations to develop and disseminate resources (e.g., educational modules, training curriculum, strategies for initiating and managing institutional change processes) to facilitate geriatric/gerontological infusion and specialization into education and training throughout California
7. Work in conjunction with CalSWEC, and Aging Initiative members in general, and the Aging Initiative Capacity Development and Sustainability Workgroup in particular, and other regional, state, and national partners to develop incentives and resources (e.g., faculty development support, student stipends, continuing education opportunities for social workers such as mid-career fellowships) to increase the quantity and quality of geriatrically-prepared social workers in California

Capacity Development and Sustainability

The recent advances in curriculum that support the framework of workforce development are destined to wilt and wither unless new and sustainable instructional capacity and learning opportunities are created. The historic lesson of the CalSWEC Child Welfare Initiative is instructive. In short, incentivizing the educational opportunity will attract and retain practitioners. Creating the framework for this critical task for the Aging Initiative is assigned to the Capacity Development and Sustainability Workgroup.

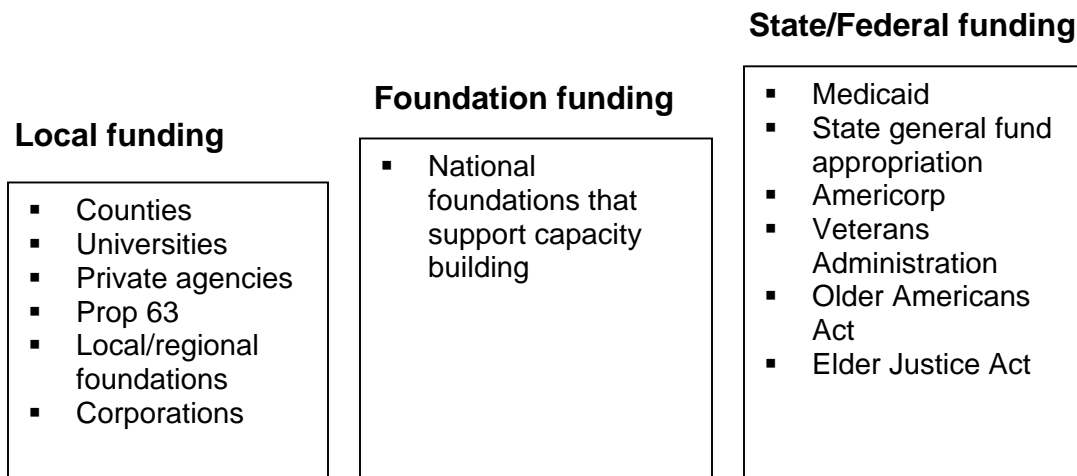
The stated goal is to develop and implement a funding plan to support the cost centers relative to the CalSWEC Aging Initiative: student stipends, field instruction, classroom instruction and other Aging Initiative infrastructure.

To increase geriatric social work practitioners in public and non-profit agencies the Workgroup envisions having 400 students from 10 California Social Work programs participating in stipend supported programs during Academic Year 2006/2007. The estimated annual cost is \$7,848,169. The costs are related to four areas:

1. Student Stipends – The beginning wages of most social work positions discourage students from incurring significant loan debt for social work education. The availability of stipends will attract new students to the major and have a greater number of those majors choose a gerontology services focus
2. Classroom Instruction – Additional faculty positions are required with preparation and practice experience in the gerontology specialty area
3. Field Instruction – An expanded cadre of faculty experienced in the arranging, monitoring and coaching of fieldwork learning is required

4. Aging Initiative Infrastructure – To assure accountability and equitable statewide opportunity for participation, some modest organizational capacity must be established within CalSWEC or a comparable organization. Such organizational capacity is critical in establishing program standards, evaluation processes and supporting curriculum development. Additionally, the organizational capacity can serve as an encourager of local partnership development that will prove key to the success of the initiative.

Whereas the CalSWEC Child Welfare Initiative used state funds already embedded in public institutions to build on a known federal resource (Title IV-E), no such readily available and reliable equivalent resource exists for the gerontology services community. Therefore the funding strategy will, of necessity, be more diverse. It will also be locally unique; building on local awareness, will and commitment. The Capacity Development and Sustainability Workgroup envisions local university and agency partnerships attracting like-minded collaborators to create a sufficient local fiscal base to gain the support of national foundations. National foundations might make their participation contingent on accessing available state and federal funds. This “portfolio” approach to funding is depicted below as sequential steps, beginning locally and building toward qualifying for categorical support.



The GSWEC model in Southern California has successfully demonstrated the sustainability of a local/regional initiative by fostering a dedicated group of agencies who agree to be designated as “Centers for Excellence”. These “Centers for Excellence” have experienced firsthand the skills and value of gerontology prepared social work graduates. Subsequently, they have voluntarily committed to financial and in-kind contributions to support student stipends, field instruction and modest administrative costs. The early experience of the GSWEC group illustrates the type of local will and commitment that should be leveraged to attract philanthropic support and qualifying for categorical state and federal funding.

The Capacity Development and Sustainability Workgroup has established short-term and mid-term goals necessary to begin striving toward the “400 by 2006” vision.

Next Steps:

1. Seek foundations support to advance the current capacity building activities of the Aging Initiative
2. Participate in expert consultation regarding leveraging of potential state and federal funds
3. Educate and consult with local collaboratives regarding start-up strategies
4. Encourage local replication of the GSWEC “Centers for Excellence” model
5. Understand and integrate Medicaid reimbursement for qualifying training
6. Support congressional passage of the proposed Elder Justice Act with the inclusion of professional training funding
7. Propose legislation that would secure state general fund dollars devoted to training in geriatric social work
8. Prepare a plan to “market” the need and opportunity to potential philanthropic and governmental funders

Summary

During 2004, the CalSWEC Aging Initiative emerged from concept to an organization of social work educators, researchers, gerontology practitioners and public agency administrators dedicated to improving services to vulnerable aging Californians and their families through increasing the number and quality of social work practitioners. The “next steps” proposed by the Aging Initiative will require the support and encouragement of the CalSWEC Board, continued participation from the Initiative Committee and some early success in attracting sustaining funding. The Aging Initiative Committee stands prepared to engage in the “next steps” outlined in this report upon approval from the CalSWEC Curriculum Committee and the CalSWEC Board.

Appendix A

John A. Hartford Foundation Geriatric Social Work Initiative Sites Located in California

Since 1998, The John A. Hartford Foundation has provided leadership and financial commitment of \$24 million to fund programs designed to strengthen geriatric social work education and prepare aging-savvy social workers for practice with older adults and their families. Hartford Foundation initiatives include the Faculty Scholars Program, the Practicum Development project, the Doctoral Fellows program, and the Counsel of Social Work Education/SAGE-SW project. With strong links to public and non-profit community-based organizations, California social work schools and programs are well represented within the network of Hartford Geriatric Social Work Initiative projects.

1. Geriatric Social Work Practicum Development (Practicum Partnership Program) sites:
University of California, Berkeley Consortium for Social Work Training in Aging
University of California, Berkeley
San Francisco State University
San Jose State University

2. Partners in Care Foundation, Burbank, CA (on behalf of four Southern California Schools of Social Work):
University of Southern California
University of California at Los Angeles
California State University at Long Beach
California State University of Los Angeles

3. GeroRICH Projects:
Azusa Pacific University
California State University, Chico
California State University, Los Angeles
California State University, Long Beach
California State University, San Bernardino
San Jose State University

4. Doctoral Fellows Program:
University of California, Los Angeles

Appendix B

Geriatric Social Work Competencies

Values and Theoretical Perspectives

1. Demonstrates the ability to assess and address values and biases regarding aging
2. Respects and promotes older adult clients' right to dignity and self-determination
3. Applies ethical principles to decisions on behalf of all older clients with special attention to those with limited decisional capacity
4. Effectively addresses diversity among older adult clients, families, and professionals (e.g., class, gender, and sexual orientation)
5. Demonstrates the ability to address the cultural, spiritual, and ethnic values and beliefs of older adults and families
6. Demonstrates the ability to relate concepts and theories of aging to social work practice (e.g., cohorts, normal aging, life course perspective, social exchange theory)
7. Demonstrates the ability to relate social work perspectives and related theories to practice with older adults (persons in environment, cognitive behavioral theory)
8. Identifies issues related to losses, changes and transitions over their life cycle in designing interventions
9. Demonstrates the ability to support persons and families dealing with end of life issues related to dying, death and bereavement
10. Demonstrates the ability to enact the perspectives and values of social work in geriatric interdisciplinary practice while respecting the roles of other disciplines

Assessment: Individual and Family

1. Demonstrates the ability to use empathy and sensitive interviewing skills to engage older clients in identifying older adults' strengths and problems
2. Adapts interviewing methods to potential sensory, language, and cognitive limitations of the older adult
3. Demonstrates the ability to conduct a Comprehensive Geriatric Assessment (CGA) (bio-psychosocial evaluation)
4. Demonstrates the ability to ascertain health status and measure functioning (e.g. ADLs and IADLs) of older clients
5. Demonstrates the ability to assess cognitive functioning and mental health status of older clients (e.g., depression, dementia)
6. Demonstrates the ability to assess social functioning (e.g., social skills, social activity level) and social support of older clients
7. Demonstrates the ability to assess the needs and level of stress and burden of families and other caregivers
8. Effectively administers and interprets standardized assessment and diagnostic tools that are appropriate for use with older adults (e.g., Depression Scale, Mini-Mental Status Exam)
9. Demonstrates the ability to develop clear, timely, and appropriate service plans with measurable objectives for older adults
10. Demonstrates the ability to reevaluate and adjust service plans for older adults on a continuing basis

Intervention: Individual and Family

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

Aging Services, Programs and Policies

1. Demonstrates the ability to provide outreach to older adults and their families to ensure appropriate use of the service continuum (e.g., health promotion, long-term care, mental health)
2. Adapts organizational policy, procedures and resources to facilitate the provision of services to diverse older adults and their family caregivers
3. Identifies and develops strategies to address service gaps, fragmentation, discrimination, and barriers that impact older persons
4. Demonstrates the ability to include older adults in planning and designing programs
5. Demonstrates the ability to develop program budgets that take into account diverse sources of financial support for the older population
6. Demonstrates the ability to evaluate practice and programs in order to promote effective outcomes for older adults
7. Applies evaluation and research findings to improve practice and program outcomes
8. Advocates and organizes with the public, agencies, and legislators to promote the needs and issues of a growing aging population

Appendix C

Resources

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Note: Photos used on cover are models only.