



***Progress Report
February
2007***

CalSWEC Aging Initiative



CalSWEC Aging Initiative

Introduction

As the CalSWEC Aging Initiative completes its third year we have experienced transitions in AI leadership, reorganization of the CalSWEC governance structure, significant growth in our membership, and a sharpening of our focus to secure long-term public funding to meet the challenges of an aging California. Throughout these opportunities and challenges the Aging Initiative has made steady and remarkable progress on our current projects and has laid a solid foundation to build for the future.

No one succeeds in isolation. The Aging Initiative has benefited from generous support from the Archstone Foundation, the California Welfare Director's Association (CWDA), and California State University, Long Beach (CSULB). Since July 2005, the Aging Initiative has been funded by a three-year \$655,000 grant from the Archstone Foundation. With contributions from CWDA and CSULB, the Archstone Foundation provides funding for the CalSWEC Aging Competencies development and dissemination; the University Curriculum Survey; the development of the three Regional Collaboratives; and the statewide Labor Force Survey. In addition, the leadership and commitment of individuals, along with agency, organizational and educational partnerships throughout the state, continue to advance the development of a well prepared labor force.

We bid a regretful farewell to Ken Patterson as Co-Chair of the Aging Initiative who, along with Margaret Tynan, has provided leadership these past three years. Ken continues his membership with the AI allowing us to reap the benefit of his expertise, particularly in the area of public funding.

The AI Chair, Margaret Tynan, welcomes two very qualified and forward-looking Co-Chairs. June Simmons and Mary Sawicki provide new leadership as we advance, particularly in the areas of capacity building, labor force development and advocacy. Together the three represent our educational, public and community commitment to older adults and their families.

This year our progress is substantial. The CalSWEC Aging Competencies, adopted in February 2006, have been disseminated to all seventeen California schools of social work and a baseline University Survey to measure adoption of the Competencies is complete. Three Regional Collaborative Demonstration Sites serve as models for developing sustainable funding for geriatric education and are developing in-service training to aging services staff based on the Hartford Practicum Partnership Program Geriatric Social Work Competency Scale II. The development of a statewide Labor Force Survey is underway and a strong collaboration with California Welfare Directors Association holds promise of a strong response and valuable data.

We revised and adopted our Mission and Goals. This document expands upon our previous statement of purpose and continues to respond to the demographic imperative facing California. As our goals help us to see the areas where we are clearly making progress they also point to the work yet to be done. We recognize a need to develop a legislative committee and a public education/image committee and seek to partner more closely with the National Association of Social Workers and the California Welfare Directors Association in these endeavors.

As CalSWEC evolves with the growth of the three initiatives, Child Welfare, Aging and Mental Health, we will seek to strengthen our interface between and among the groups. The work of each shares a common bond with the other and the intersection can be a source of collaboration and commitment toward our goals.

The development of a strategic plan to pursue long-term private/foundation funding sources and resource sharing opportunities has led to initial explorations and the hope of future partnerships. These potential partnerships may guide us as we work toward the development of public mechanisms to provide a competent, diverse workforce to meet the needs of an increasingly diverse population of aging Californians and their families.

Development of a sustainable AI infrastructure continues to be a challenge and our plan outlines the need for staff to continue the coordination of the Aging Initiative leadership and to support grant writing and fund development efforts.

This report documents our outcomes and successes, describes our future plans and renews our commitment to the work at hand.

ARCHSTONE FOUNDATION

The funding for the CalSWEC Aging Initiative (AI) projects has been primarily through the Archstone Foundation (President and CEO Joseph F. Prevratil and Director of Programs and Grant Officer, E. Thomas Brewer), through a three year award (2005-2008, \$655,000; Co-Principal Investigators JoAnn Damron-Rodriguez, Ph.D. and Catherine Goodman, DSW). Projects and deliverables funded by this Archstone grant are founded in the goals of the CalSWEC Aging Initiative with input from stakeholders in the 2004 Aging Summit. The Archstone grant aims to enable the AI to address the mission of sustainable incentives for social workers, competency driven geriatric social work education, and professionalization of the labor force for service delivery to older persons and their families. The Archstone Foundation has been dedicated to promoting healthcare and aging services for over 20 years and is committed to areas of elder abuse, fall prevention, and end-of-life care over the next five years, as well as emerging community needs.

Membership

The following individuals serve as Chairpersons and Staff:

- Margaret Tynan, Chair
AI and Strategic Planning
- Ken Patterson, Past Chair
AI and Strategic Planning
- Mary Sawicki, Co-Chair
AI and Strategic Planning
- June Simmons, Co-Chair
AI and Strategic Planning
- Kathy Sniffen, Coordinator

The following individuals serve in Leadership Roles

- JoAnn Damron-Rodriguez, Archstone
Principal Investigator
- Catherine Goodman, Archstone
Principal Investigator
- Rodger Lum, Curriculum Workgroup
- Jong Won Min, Curriculum Workgroup
- John Oliver, Workforce Workgroup
- Ken Patterson, Capacity Development &
Sustainability Workgroup
- Molly Ranney, Curriculum Workgroup
- June Simmons, Capacity Development &
Sustainability Workgroup



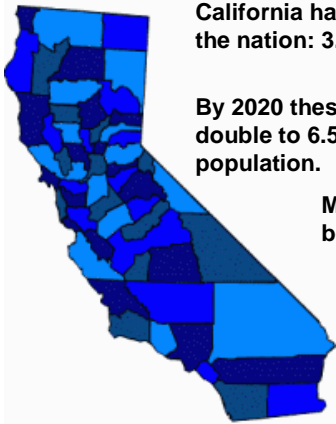
Members & Affiliations

The Aging Initiative strives to create and maintain a partnership of key stakeholders representing diverse groups inclusive of public and private education and service provider communities, appropriate state, county and local agencies, representatives of older adults, families and caregivers, key stakeholder groups, and the private sector.

- Pauline Abbott
California State University, Fullerton
- Terri Alberts
Riverside County Dept. of Social Services
- Joanne Altschuler
California State University, Los Angeles
- Wendy Aquin
Orange County Adult Services
- Ann Arneill-Py
California Mental Health Council
- Eileen Carroll
California Dept. of Social Services
- Connie Corley
California State University, Los Angeles
- John Cullen
Contra Costa County Employment & Human Services
- JoAnn Damron-Rodriquez
University of California, Los Angeles
- Sadhna Diwan
San Jose State University
- Karin Elliott-Brown
California State University, Los Angeles
- Cecilia Espinola
Santa Cruz County Human Resources Agency
- Catherine Goodman
California State University, Long Beach
- Denise C. Hunt
Stanislaus County Behavioral Health & Recovery Services
- Rebecca Guider
Orange County Adult Services
- Celeste A. Jones
California State University, Chico
- Slettie Jones
Los Angeles County Dept. of Mental Health
- Brian Keefer
California Mental Health Planning Council
- Derrell Kelch
California Association of Area Agencies on Aging
- Stuart Kirk
University of California, Los Angeles
- Linda Kretz
Alameda County Dept. of Adult & Aging Services
- R. Connie Lira
California Mental Health Planning Council
- Morgan Lloyd
California Social Work Education Center
- Eva Lopez
California Dept. of Social Services
- Rodger Lum
Bay Area Academy
- Dianne Mahan
San Francisco State University
- Betty Malks
Santa Clara County Dept. of Aging & Adult Services
- Chris Mathias
California Social Work Education Center
- Roseanna McCleary
California State University, Bakersfield
- Lorraine Midanik
University of California, Berkeley
- Jane Middleton
California State University, Fresno

- Pam Miller
 - Froylana Miller
 - Jong Won Min
 - Wendy Moore
 - Teresa Morris
 - Debra Morrison-Orton
 - John Oliver
 - Stuart Oppenheim
 - Ken Patterson
 - Michael Peck
 - Anne Petrovich
 - Lee Pullen
 - Molly Ranney
 - Barrie Robinson
 - Mary Sawicki
 - Andrew Scharlach
 - Bob Sessler
 - June Simmons
 - Jeannie Smalley
 - Kathy Sniffen
 - Kevin Tsang
 - Margaret Tynan
 - Debbie Winters
 - Kathy Young
- Yolo County Dept. of Employment & Social Services
 - Loma Linda University
 - California State University, San Diego
 - San Joaquin County Human Services Agency Adult Services
 - California State University, San Bernardino
 - California State University, Bakersfield
 - California State University, Long Beach
 - Child & Family Policy Institute of California
 - Stanislaus County Community Services Agency
 - San Jose State University
 - California State University, Fresno
 - Marin County Adult Social Services
 - California State University, Long Beach
 - University of California, Berkeley
 - Calaveras County Works & Human Services Agency
 - University of California, Berkeley
 - Contra Costa County Aging & Adult Services
 - Partners in Care Foundation
 - California Dept. of Social Services
 - California Social Work Education Center, Aging Initiative
 - Los Angeles County Dept. of Mental Health
 - California State University, Stanislaus
 - University of Southern California
 - Ventura County Adult Protective Services

California Trends



California has the largest older adult population in the nation: 3.6 million adults 65 years or older.

By 2020 these numbers are expected to more than double to 6.5 million representing 14% of the population.

Most growth between 2010 and 2030 will be due to the aging of Baby Boomers.

By 2030 the oldest Californians, those aged 85 years and older, will constitute 1 in 5 of the state's older residents.

(Berg, 2006)

Messages



Margaret Tynan
Chair

It is an honor and privilege to be associated with the dedicated and capable members of the California Social Work Education Center (CalSWEC) Aging Initiative (AI). February 2007 marked the third year since the Aging Initiative's inception and the end of another very exciting and productive year. Much progress has been made toward the achievement of the vision that inspired CalSWEC to launch the AI Initiative: *The development of a competent, diverse workforce to meet the needs of an increasingly diverse population of aging Californians and their families.* Building on the success of CalSWEC in public Child Welfare in substantially increasing the numbers of social workers prepared to work with children and their families, the AI is focused on development of resources that will increase the

numbers of social work professionals competent to work with the burgeoning older adult population. The AI accomplishments documented in this report were made possible through the collaborative efforts of leaders in public and private agencies serving older adults and those in graduate social work programs throughout California.

CalSWEC, founded in 1990, 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. With the addition of the two Initiatives, Mental Health and Aging, CalSWEC reorganized its governance structure to better facilitate a more cohesive, effective and efficient approach to achieving its multiple goals. It is my hope that the reorganization will foster a multigenerational approach to the challenges of developing a competent social work workforce.

In my experience as a social work educator as well as my prior experience in the field of aging and long term care, it is evident to me that all social work is accomplished in the context of relationships that are multigenerational. The new CalSWEC structure offers a wonderful opportunity for us to work across arenas of practice and find ways to achieve our goals in concert to prepare competent social workers for now and the future.

I am grateful for the opportunity to be part of the important work in which the CalSWEC Aging Initiative is engaged. I would like to thank each member of the AI for their wonderful contributions to its success. I am especially grateful to Kathy Sniffen, AI Coordinator. Her support, incredible skill and good humor are invaluable.

Messages



June Simmons
Co-Chair

I am honored to serve as Co-Chair of the CalSWEC Aging Initiative (AI). Our leadership structure is representative of the constituent groups in the AI—Deans and Directors of schools of social work, County Social Welfare Directors and the community. I am pleased to represent the community non-profit agency sector that serves older adults. I am CEO of Partners in Care Foundation and have served as one of the founders and as the program officer for the Geriatric Social Work Education Consortium (GSWEC) in Southern California. This is a seven year old collaborative dedicated to recruiting MSW students to geriatrics through stipends and advanced high quality field education in the second year.

Originally one of the pioneer Hartford Foundation funded Practicum Partnerships, GSWEC recruits, fund and trains 35 students each year. Partners in Care serves as coordinating support and fiduciary for several collaboratives including this one. In addition, it is a nationally respected center of development of new models of care. Developing the vision through collaboratives, the innovations are tested and, when proven, disseminated. Evidence-based practice model development and dissemination is a clear leadership role.

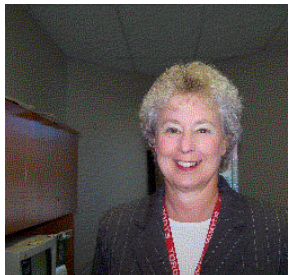
I am pleased to serve with the Co-Chairs and the Aging Initiative members to work together to craft the vision and strategy to take recruitment and education/training statewide to expand and strengthen the geriatric-competent social work workforce for the expanding older population. California has 3.6 million older adults and the imperative to build systems to support health, independent living and a strong long term care system is great. CalSWEC's leadership in building a larger and more skilled social work labor pool is crucial. I am honored to participate.

Mission



The overarching mission of the CalSWEC Aging Initiative (AI) is the development of a competent, diverse workforce to meet the needs of an increasingly diverse population of aging Californians and their families. The AI promotes the development and dissemination of aging curriculum, promotes workforce development and leadership capacity, supports practice oriented research in aging, health and mental health, stimulates and seeks funding for capacity development, supports planning for sustainability, and advocates for policies and legislation that enhance service provision to improve quality of life for aging Californians and their families.

Messages



Mary Sawicki
Co-Chair

Although I am a new-comer to my role as Co-Chair of the CalSWEC Aging Initiative, my interest and professional background in the field of aging is longstanding. Presently, I am the County Welfare Director and Public Guardian for Calaveras County. Previous leadership include

positions as the Area Agency on Aging Director in three states, as well as various positions as administrator, welfare director and social worker. In my prior work with the California Association of Area Agencies on Aging and my current position with the California County Welfare Directors Association, I have seen the vast array of services offered and the combined efforts to educate our workforces. Both organizations are committed to serving the elderly today while planning for what is needed in the future.

I feel privileged to represent the CWDA on the Aging Initiative and further our commitment to having an educated workforce. Our goal is to meet the demands of present and future aging populations including those who are living in poverty.

Work alongside the Deans and Directors of the schools of social work, expert gerontologists, and the National Association of Social Workers in formulating curriculum and movement toward permanent student funding is both motivating and an honor.

I particularly want to thank Ken Patterson, Director of Stanislaus County Community Services Agency, who along with Margaret Tynan served as first Co-Chairs of the Initiative, building on the founding work of Jeff Jue and others. His foresight and dedication have enabled the Aging Initiative to move forward in exploring public and private mechanisms for making the dream of an educated workforce a possible reality. Ken was instrumental in laying the vision that will serve the Initiative well as it moves toward meeting the future demand of our citizens.



Goals

1. Create and maintain a partnership of key stakeholders representing:
 - public and private education and service provider communities,
 - appropriate state, county and local agencies,
 - representatives of older adults, families and caregivers,
 - key stakeholder groups, and
 - the private sector.
2. Develop and implement a statewide workforce development strategy for geriatric/gerontological social work that includes specific strategies to:
 - a. advocate for and seek sustainable funding for aging workforce training,
 - b. build capacity,
 - c. create incentives,
 - d. attract students, and
 - e. improve the diversity of the workforce.
3. Expand competency-based geriatric/gerontological curriculum and specialization in California graduate schools of social work. Stimulate the development of a full continuum of competency-based geriatric/gerontological training and education programs at every level of education from high school through doctorate degree, and for use as employee in-service training.
4. Advocate for and advance programs, policies and legislation that support and fund the growing need to:
 - a. recruit and retain diverse, professionally trained geriatric / gerontological social workers,
 - b. further train existing workers employed in aging services agencies,
 - c. improve quality of life and support needs of older adults and their families,
 - d. utilize input from diverse aging consumer stakeholders in the process,
 - e. secure funding and lead and/or guide programs to achieve the above goals, one through three.
 - f. develop and contribute to legislative initiatives to further workforce development for older adults and families.
5. Support research in aging, health, and mental health to advance best-practices knowledge development.

Reorganization of CalSWEC

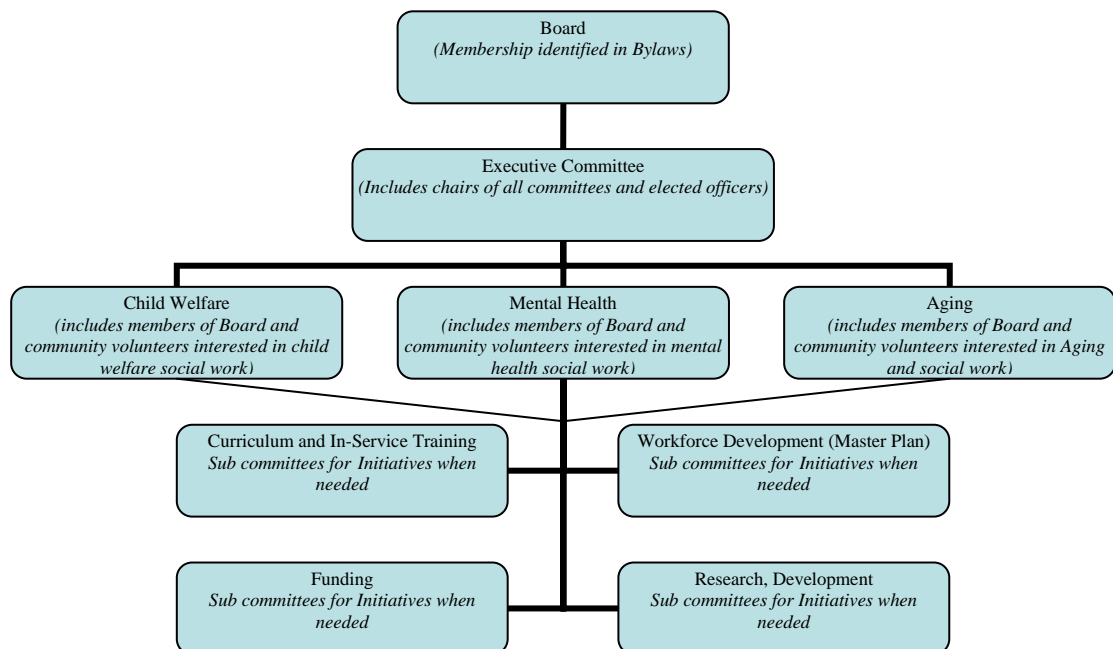
In May 2006 CalSWEC's Board passed a motion to reorganize its governance structure to reflect the expansion of CalSWEC's work in Mental Health and Aging. The Board now consists of three committees; Child Welfare, Mental Health, and Aging, and four subcommittees. These subcommittees are: Curriculum, Research and Development, Workforce Development and Funding.

The four subcommittees are designed to have members from all three of the above committees. Therefore, the agenda will cut

across all three service areas (child welfare, mental health, aging) but will maintain its focus on the purpose of the subcommittee.

It is anticipated that the new governance structure will allow a more cohesive effective and efficient approach to the work of each committee. Further, the new structure should offer each of the subcommittees, through their joint efforts, opportunities to collaborate in the creation of innovative strategies to accomplish their goals.

Below is a schematic of the governance structure.



Members

Margaret Tynan, Lead
Mary Sawicki, Co-Lead
June Simmons, Co-Lead
JoAnn Damron-Rodriquez
Catherine Goodman
Rodger Lum
Betty Malks
Christine Mathias
Pam Miller
Jong Won Min
John Oliver
Ken Patterson
Molly Ranney
Andrew Scharlach
Bob Sessler
Jeannie Smalley
Kathy Sniffen
Kevin Tsang
Kathy Young

Strategic Planning and Capacity Development & Sustainability

The Strategic Planning Workgroup and the Capacity Development & Sustainability Workgroup collaborated to develop a plan to pursue long-term public funding. The overarching goal is to build and sustain gerontological social work education in order to continue the development of a professional labor force to serve older persons. Six meetings were held during the year culminating in an all day retreat on November 2, 2006 at California State University, Long Beach. Discussion and outcome of the Retreat follow.

Strategic Planning Retreat

A Strategic Planning Retreat was held on November 2nd at California State University, Long Beach to develop strategies to pursue long-term public and private funding partnerships in order to build and sustain gerontological social work education to continue the development of a professional labor force to serve older persons. Members evaluated the progress of the Aging Initiative over the three years of existence and looked for areas for further growth.

A great deal has been accomplished. With the support of the Archstone Foundation, the Aging Initiative developed and adopted the CalSWEC Aging Competencies and disseminated the Competencies to all seventeen California schools of social work. A statewide University Survey of those schools provides baseline data regarding the current status of gerontological social work

education and gives us information into the current "supply" of social workers available. A Labor Force survey, still in development, will provide information about the current and future demands for social workers and potential barriers to service. Three Regional Collaboratives, located in northern, central and southern California provide an organizational structure for dissemination, identification, and development of stipends for social work education, as well as, staff in-service training using the CalSWEC Competencies. Students in these settings may also be identified to receive leadership training to begin to address the growing concern of leadership turnover within agencies over the next twenty-four to thirty months.

The Aging Initiative continues to build alliances with public and private agencies

with a primary interest in meeting the needs of California's aging population and strives to advocate for our common interests. Aging Initiative leadership held informative meetings with Lora Connolly at the Department of Aging and Eva Lopez at the Department of Social Services to keep them updated on our strategies to improve the aging services workforce and seek their input. The Aging Initiative identified the need to develop two new committees to accomplish our goals, a legislative committee and a public image committee. We will seek to partner more closely with NASW (National Association of Social Workers) and CWDA (California Welfare Directors Association) in this expansion.

Along with these accomplishments are needs for further work. The success of the CalSWEC model in Child Welfare is built, in part, on the ability to draw students to the field through the stipend incentive. The Aging Initiative identifies the creation of stipend incentives to finance social work education as a goal. Masters level social workers specializing in gerontology would enhance the professional labor force that serves older persons. An important long-term goal is to fund social work education through a line item in the state budget. As evidence mounts that the aging boom and the demographic imperative are reaching crisis levels we are building solid working relationships with national, state and local partners, good statistical data of supply and demand needs, and exploring strategies for financing social work education to further professionalize the labor force.

To accomplish our capacity building and funding goals the Strategic Planning Workgroup prepared a Concept Paper to

use as a guide for moving forward. This plan was approved by the CalSWEC Executive Board at the February 2007 meeting. Key excerpts from the plan follow.

PURPOSE

The overall purpose of all our work is to recruit and develop an expanded, competent workforce to provide social work services to optimize health and quality of life to diverse older adults and their families. This includes the recruitment and training of those who serve as leaders of organizations developing and providing social work, health and other services to older adults. There is a current shortage of qualified staff. There is dramatically growing demand which will exacerbate this shortage. And there is a need for succession preparation to build a cadre of future leaders to step in to place as the current pioneering leaders move toward retirement or less intense work roles.

PLANNING

Prior to seeking specific funding for initiatives within the broad fundable categories outlined below, it was agreed that the immediate priority is to seek funds for staff to continue the coordination of the AI (Aging Initiative) leadership office and to support grant writing and fund development efforts.

TARGET POPULATIONS

Broad areas of development programming will target three categories of social work talent:

- 1) New to the field**
- 2) Returning to the field, full or part-time**
- 3) Current workforce**

New to the Field of Social Work:

Workforce shortages exist throughout most social work practice areas, and a concerted effort to attract new talent to the field is imperative. In our case we will simultaneously concentrate on working to draw that talent to the field of aging services. Recruitment at both the Bachelor's and Master's levels is important.

Returning to the Field of Social Work:

Many social workers have retired or left the field for other opportunities. Drawing back social workers, especially at the Masters level, is an important potential source of expanded workforce. Building opportunities for updating knowledge and skills and creating both full and part-time paid and volunteer opportunities can lead to a broader base of talent for both service and leadership.

Current Social Work Workforce:

Recruiting social workers from other fields of practice is one avenue to pursue. Another is to continue to professionalize the workforce through offering either opportunity to advance to Master's training similar to the CalSWEC Title IV-E program or to provide job-linked education/certification through special workplace training, distance learning, shared in-service education or other opportunities.

In addition to strengthening direct service knowledge and skills of current staff in senior serving agencies, it will be vital to identify those with leadership potential and desire and mentor and develop special learning opportunities.

SOME INITIAL STRATEGIES

- Seek an ongoing base of public funding through a line-item in a relevant government agency such as California Department of Social Services (CDSS), California Department of Aging (CDA) and other key departments.
- Seek legislative support to advance resources for this work.
- Seek private foundation and donor support to seed the development of these strategies.
- Build a broad program of communications and social marketing to create attractive and accurate images for the aging practice specialty.
- Develop sustainable financial incentives such as loan forgiveness and/or stipends to help pay for education and serve as "bait" to draw new talent into the field.
- Establish jointly funded faculty and staff positions through Town/Gown partnerships.
- Develop resources for funded Field Supervision to advance the level of teaching.
- Adapt current distance learning resources to this purpose.

A second Strategic Retreat is set for March 1, 2007 at California State University, Stanislaus, hosted by Margaret Tynan. The purpose of that meeting will be to set our plan in motion.

Members

Jong Won Min, Past Lead
Rodger Lum, Co-Lead
Molly Ranney, Co-Lead
Connie Corley
JoAnn Damron-Rodriguez
Karin Elliott-Brown
Slettie Jones
Roseanna McCleary
Gigi Nordquist
Stuart Oppenheim
Michael Peck
Anne Petrovich
Barrie Robinson
Debbie Winters
Jean Schuldberg

Curriculum Workgroup

We wish to thank Jong Won Min for his leadership and service as the Lead of this Workgroup through September 2006.

The Curriculum Workgroup bid farewell to long time Lead, Jong Won Min, Ph.D. of California State University, San Diego Department of Social Work. Dr Min led the Workgroup through the completion and adoption of the CalSWEC Aging Initiative Competencies and the early dissemination into the seventeen California schools of social work. Dr. Min continues to consult with the Aging Initiative on several projects. Molly Ranney, Ph.D., of California State University, Long Beach, and Rodger Lum, Ph.D, Director of the Bay Area Academy are the current Co-Leads of the Curriculum Workgroup. We welcome our new leadership in this workgroup.

Next Year's Goals

1. Continue to promote dissemination and implementation of AI Social Work Competencies through the academic Policy and Accreditation infrastructure throughout California
2. Disseminate the results of the baseline survey of AI competency adoption by California MSW programs to all key stakeholders

Funded by the Archstone grant, a statewide survey of Master's of Social Work (MSW) programs was conducted in 2006 to assess the baseline level of AI competency adoption. The results of this study will be presented at the May 2007 CalSWEC AI meeting.

This year the Curriculum Workgroup distributed the approved CalSWEC Aging Initiative (AI) Competencies to stakeholders which included the 2004 Aging Summit delegates, County Welfare Directors' Association (CWDA), Deans and Directors of Schools of Social Work, and CalSWEC AI committee members.

CalSWEC Aging Competencies Framework

For a full copy of the CalSWEC Aging Competencies go to

http://calswec.berkeley.edu/CalSWEC/Aging_Competencies.html

Foundation Competencies (First Year)

- I. Age, Diversity, and Disadvantage
- II. Core Foundation Practice with Older Adults
- III. Aging, Human Behavior and the Social Environment
- IV. Aging Social Welfare Policy & Administration

Advanced Competencies (Second Year)

- V. Culturally Competent Social Work Practice in Aging
- VI. Advanced Practice with Older Adults
- VII. Perspectives on Aging, Human Behavior & the Social Environment
- VIII. Advanced Aging Social Welfare Policy and Administration

*Workforce Development Workgroup
&
Labor Force Survey Team*

During the past year, the Labor Force Workgroup has collaborated with the Archstone Labor Force Survey Team (Steve Wilson, CSULB; Ailee Moon, UCLA, JoAnn Damron-Rodriguez and Catherine Goodman, Co-PIs, Archstone Grant) on the development and acceptance of the California Labor Force Survey. During this time, a closer collaboration has developed with the California Welfare Directors Association (CWDA).

CWDA identified Adult Protective Services (APS) as their area of focus during the upcoming year. Therefore, they will address the lack of funding for this program and initiate legislative steps to gain additional funding. They are collaborating with the Labor Force Team on the refinement of the survey, which will provide information that may be useful for their APS initiative. The support of CWDA for the Labor Force Survey will mean a better response rate and steps have been taken to coordinate the survey instrument more closely with county record keeping and to schedule data collection according to CWDA meetings and activities.

Presentations and Feedback: The labor force survey plan and instrument have been presented to the Aging Initiative at their general meeting (Sacramento, Sept 28, 2006); at all three Regional Collaboratives; at the CWDA and C4A (California Association of Area Agencies on Aging) meeting; to CWDA and C4A representatives in Sacramento; and phone conferences have taken place with the Senior Program Analyst from CWDA. Altogether nine feedback/ collaboration meetings have been held. Additionally, two consultations have been completed with Michael Barth Ph.D., economist, who has worked with the Hartford Foundation on a nationwide report on the Labor Market for Social Workers.

*Workforce
Members*

John Oliver, Lead
Pauline Abbott
Terri Alberts
Ann Arneill-Py
Catherine Goodman
Rebecca Guider
Connie Lira
Lee Pullen

Survey Team

JoAnn Damron-Rodriguez
Catherine Goodman
Ailee Moon
John Oliver
Nancy Takahashi
Steve Wilson

Sampling: As a result of the opportunity to collaborate with CWDA and C4A agencies, the survey is now refocused on social service programs, with special attention to APS & In-Home Supportive Services (IHSS). C4A agencies and sub-contractors will also be surveyed. Sub-contractors will provide a good sample of social service programs, such as Multipurpose Senior Services Programs (MSSP) and Alzheimer's Resource Centers, among others. Additionally, a limited number of medical services will be sampled, specifically hospice and adult day health care.

Data Instrument and Data Collection Plan: The data instrument is nearing completion and will be circulated shortly to the Workforce Development Workgroup for approval. Data collection has been scheduled for June through August with CWDA. The plan is to attend the CWDA meeting in June and distribute the survey, distribute the survey also by Survey Monkey, mail and email, and attend the CWDA meeting in August. Data Collection with C4A agencies, hospice, and adult day health care is planned tentatively for June.

Labor Force Survey Goals:

- To provide a statewide market inventory of the social service labor force providing services to older adults and their families.
- To help delineate potential roles for social workers and help guide future initiatives in aging.
- To provide recommendations for social work education, public policy, and aging service organizations regarding potential employment opportunities for geriatric social workers.



- Building upon labor “needs” that are based on demographics, this study will provide workforce projected “demands” for aging services workers

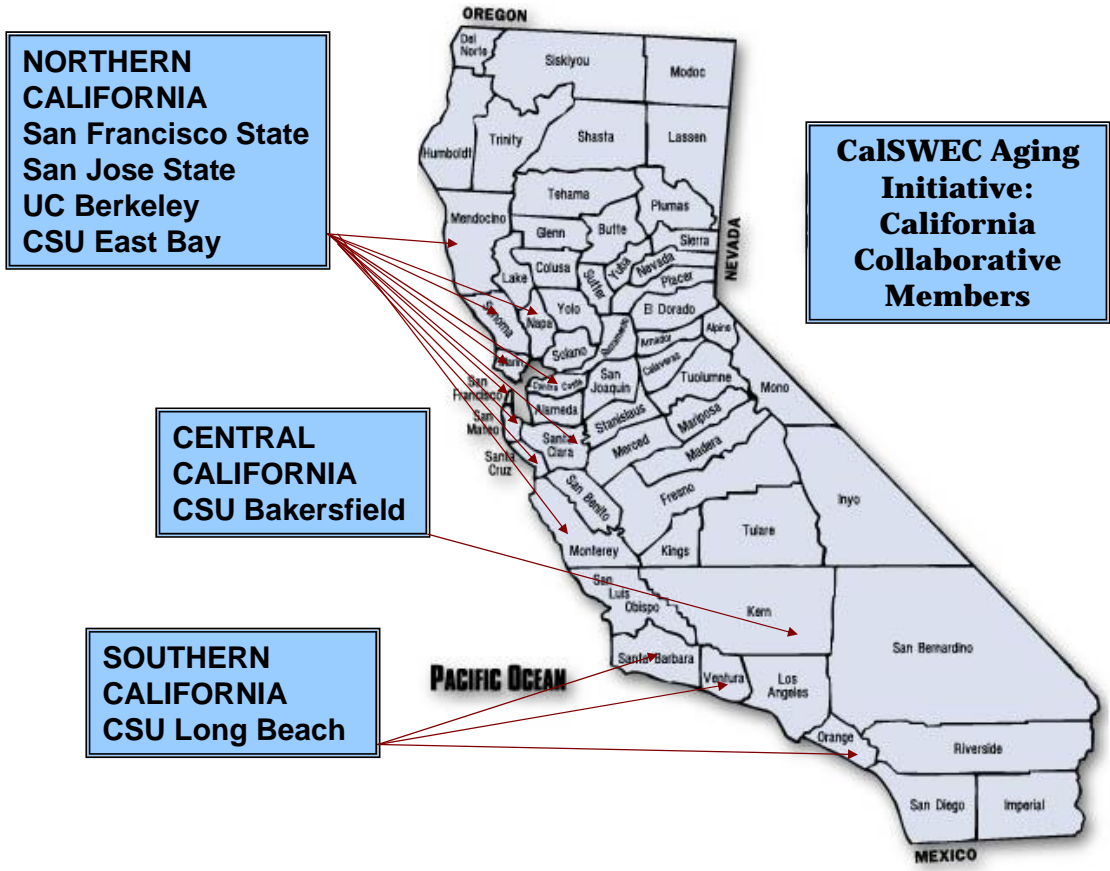
Labor Force Survey: Major Domains of Inquiry

1. *Types of Services Provided by the Organization*
2. *Client Characteristics of the Organization*
3. *Staffing and Vacancies in Aging Services*
4. *Potential Barriers to Hiring*
5. *Labor Force Projections: Future Hiring Needs of Aging Service Workers*
6. *Assessment of Current Aging Service Workers*
7. *Recommendations for Education and Public Policy*

Regional Collaborative Demonstration Sites

Through a competitive process three regional county/university collaborative sites, representing northern, central and southern California, were selected in December, 2005. The primary goal for the sites is to develop a sustainable funding source for improving the training of geriatric social workers through supportable claiming of available state and federal funds and other regional strategies. Additional goals are to develop sites which serve as distribution points for Archstone funded stipends for social work students, be delivery points for in-service training, and provide entry to agencies for a planned labor market survey of social workers in aging.

Each Regional Collaborative is distinctive in terms of structure, organization, leadership, membership and goal implementation, having developed their own systems for moving forward. The Northern Collaborative consists of 10 counties and 4 universities with co-leads from one county and one university. The Central Collaborative consists of one county and one university with a co-lead from the county and university. The Southern Collaborative consists of one university and 3 counties with a university lead and all three counties acting as co-leads.



To date the Archstone Foundation has used these Regional Collaborative sites to distribute a total of fourteen \$4000 stipends for students pursuing master's level education in gerontological social work. Collaborative partners are required to match those stipends one-to-one in the 2006-07 academic year and two-to-one in 2007-08.

Throughout the three regions the matches have come from sources such as county agencies providing match funds for currently employed students and students who receive GSWEC (Geriatric Social Work Education Consortium) stipends that are identified to serve as match. In addition, mental health stipends have served as match, as have two mental health traineeships, where students serving in mental health and aging are paid for their internships. For this year there are a total of 28 students who are part of the first cohort of CalSWEC Aging Initiative Interns. CalSWEC AI extends our congratulations to each of the Collaboratives for their success in creating these internship arrangements.

A synergistic development is resulting from the facilitative efforts of Stanislaus County, Community Services Agency (CSA) and California State University, Stanislaus (CSUS). Stanislaus County was not identified as a Regional Collaborative,

however, due to leadership from the above organizations and consultancy contracts, Stanislaus County has assisted the collaboratives in understanding one model for reimbursement of educational training expenses for current employees. As a result of the research and training that the Stanislaus county consultants have provided, CSA decided to utilize this knowledge to claim reimbursement for students' education in the CSU Stanislaus MSW program through Title XIX for four county staff members enrolled in the program. Successful processing of these educational expenses may result in replication of the claims in other areas of the state. For the Aging Initiative this increases the number of funded CalSWEC Aging Initiative Interns to 32.

All of these efforts are advancing social work education and the CalSWEC Aging Competencies will guide student learning. Pre and post test evaluations will assist us in measuring student progress. This effort furthers the development of a competent workforce to meet the needs of an increasingly diverse population of aging Californians and their families. Following are further description of the individual Regional Collaboratives and their progress and goals.

The primary goal for the Regional Collaborative sites is to develop a sustainable funding source for improving the training of geriatric social workers through supportable claiming of available state and federal funds and other regional strategies. Additional goals are to develop sites which serve as distribution points for Archstone funded stipends for social work students, be delivery points for in-service training, and provide entry to agencies for a planned labor market survey of social workers in aging.

Northern Regional Collaborative

Members

Betty Malks, Co-Chair
Michael Peck, Co-Chair
Don Allegri
Reymundo Anthony
Ruth Atkin
Jamie Buckmaster
Chuck Castellar
Mary Counihan
Christa Countee
Linda Curtis
Susan Era
Mary Goblirsch
Janet Johnson
Diane Kaljian
Tom Kemnitz
Linda Kretz
Lisa Lahowe
Eileen F. Levy
Janet Lombard
Dianne Mahan
Lisa Mancini
Dina Redman
Carol Rex
Barrie Robinson
Chris Rodriguez
Linda Watts
Katrina Williams

The Northern Regional Collaborative is the largest of the three demonstration sites and has expanded its membership over the past year from seven counties to ten and from three universities to four. Betty Malks, of Santa Clara County, and Dr. Michael Peck of San Jose State University act as Co-Chairs of the Collaborative. The ten participating counties are Alameda, Contra Costa, Mendocino, Monterey, Napa, Santa Clara, Santa Cruz, San Francisco, San Mateo, Solano, and Sonoma. Universities in the Collaborative are University of California, Berkeley; California State University, East Bay; San Francisco State University, and San Jose State University. With support from BASSC (Bay Area Social Services Consortium) the Northern Collaborative was able to secure a part-time project coordinator and meetings are held on an almost monthly basis.

As part of the Archstone funded grant, members received training on state and federal claiming strategies and fiscal department representatives from several counties attended the meetings. The frequency of meetings, leadership style and dedicated staff time contribute to increased communication within the Collaborative particularly between the schools and agencies. Inter-collaborative communication was also initiated between the three Collaboratives, Northern, Central and Southern, via the sharing of Collaborative Minutes and by a two-hour teleconference held by the Archstone Grant Principal Investigators, Catherine Goodman and JoAnn Damron-Rodriguez. Inter-collaborative communication is facilitated by the Aging Initiative Coordinator, Kathy Sniffen who attends Collaborative meetings in all three Regions and acts as the liaison between various partners.

The creation and development of the Collaborative and availability of six Archstone funded stipends and six community matched stipends has led to a sense that the "word is getting out". There is a student-driven energy to get the universities "on board" and involved in public image campaigns about aging and social work. There is an increased student interest in Gerontology and members report that nationally others want to know about the California CalSWEC Aging Initiative model. This initiative builds on the work of the Hartford Initiative and the CSWE (Council on Social Work Education) Gero-Ed models to build a competent workforce to meet the needs of aging Californians and their families.

Next Year's Goals

1. Continue development of the intern placement review process
2. On-going recruitment to MSW gerontology programs
3. Develop public relations and publicity campaigns regarding: social work image, aging image and the work of the Collaborative
4. Develop in-service training for county employees and aging network partners
5. Replicate the Medicaid/ MediCal claiming process for training
6. Institute long-term leadership training opportunities
7. Develop and expand partnerships with stakeholders
8. Garner legislative support

Members

Kris Grasty, Past Co-Chair
Roseanna McCleary, Co-Chair
Paul Rozell, Co-Chair
Brad Cloud
Monica Jeffries
Mike Martin
Susan Spjut
Debbie Stevenson

Central Regional Collaborative

The Central Collaborative Regional Site is coordinated through a partnership between California State University, Bakersfield Master of Social Work Department, Kern County Aging and Adult Services Department and Kern County Mental Health. Leading this collaborative effort are Roseanna McCleary, Ph.D., and Kris Grasty who subsequently appointed Paul Rozell to replace her.

During the current academic year a geriatric track for the MSW program was established for students interested in working with the elder population and CalSWEC Geriatric Practicum sites were developed to train the interns. Four Archstone funded grants were awarded to qualifying students and matching grants were developed for an additional four students which, in some cases, exceeded the minimum match requirement.

Next Year's Goals

1. Provide a "Caregiver Training" for the community, members of the collaborative and the CSUB Master's level students
2. Expand Geriatric internship practicum sites
3. Work collaboratively to award CALSWEC Aging Initiative grants
4. Develop a training program on Older Adult topics for the community and the CALSWEC Aging Initiative students
5. Define the funding stream for matching grants and deposit grant funds to be used by the program with Kern County Aging and Adult Services Department
6. Establish set times for CALSWEC meetings (monthly, bi-monthly or quarterly) to provide continuity of members attending
7. Increase the number of agency personnel (Mental Health and Aging and Adult Services) to apply for the MSW Program
8. Sponsor at least one large conference with a specialty speaker on Older Adult issues such as the Older Adult Suicide Intervention Center Coordinator
9. Create the opportunity for agency personnel and students to attend the Cultural Competency Conference in Fresno

Thank you to Kris Grasty who served as Co-Chair and passed leadership on to Paul Rozell in Winter, 2006.

Southern Regional Collaborative

Next Year's Goals

1. Select the next group of four stipend students and their match of eight students.
2. Plan the two-cycle in-service trainings. This will include: locating a private (non or for profit) agency to manage the funds with no in-direct cost; locate an independent contractor(s) or individual speakers/trainers to conduct in-service trainings and engage in outcome-evaluation.
3. Collaborate with the Central and Northern Regional Collaboratives to compile material from all in-service trainings into a Geriatric Curriculum Module.
4. Encourage employees from Orange County to apply to the MSW program at CSULB.
5. Continue to explore the feasibility of incorporating a concentration of Older Adults and Families in the Department's Distance Education program at CSU Channel Islands.

Members

Wendy Aquin
Michael Dean
Agathi Glezakos
John Oliver
Phil Tan
Kathy Young

The Southern Regional Collaborative is a partnership consisting of California State University, Long Beach, Orange County, Ventura County, and Santa Barbara County. Structurally, this group shares leadership duties with all participants taking an active role and Dr. Agathi Glezakos, of CSU, Long Beach, taking responsibility for organizing meetings. Members met with state and national consultants to gain an understanding of claiming strategies for state and federal funds. Eligibility and selection criteria for student stipends were developed and stipends were awarded. A total of eight CalSWEC Aging Initiative Interns, including Archstone funded and GSWEC identified students participated. Collaborative members began initial explorations into the possibility of adding an Older Adults and Families concentration option to the Social Work Department's Distance Education program at California State University, Channel Islands.

Members contributed feedback on the CalSWEC Labor Force Survey currently in development to Dr. Steve Wilson, one of the survey developers. They provided valuable input on survey content, sampling plan, data collection plan, and accessing key informants. Kathy Young, of Ventura County Aging and Adult Services, continues to work closely with the Labor Force Survey team as a key informant to assist with the survey development outcomes.

CalSWEC AI Interns are given leadership opportunities. One of the students was a student representative on a panel of social workers who work with older adults. The panel presentation was part of the Department's annual Career Paths in Aging program which is presented to all seniors in the BASW program. The student discussed his internship experiences in an out-patient mental health program for older adults, his increased appreciation of this age population, his commitment to a career in aging and the effects of the stipend. Another student was interviewed for a media release to local papers regarding his experience in social work with older adults.

Conclusion

As we reflect on our accomplishments through the efforts of the AI members and leadership, with the generous support of the Archstone Foundation, it is evident that steady forward progress is being made. The challenges presented with transitions in leadership and changes in organizational structure create opportunities for new growth, vision and strengthened collaboration. Our previous two Progress Reports built a strong case for the need to engage in this effort (<http://calswec.berkeley.edu/indexAge.html>). The current Report begins to bear the initial fruit of that work.

With Aging Competencies developed and baseline data gathered we are poised to continue the distribution, integration and infusion of the skills needed so that social workers can address the complex multi-generational needs of older adults and their families. The coming year will see continued effort to disseminate and implement the Competencies.

The Regional Collaboratives provide a structure for identifying and developing sustainable funding sources for education that meet the diverse regional needs of our state. Local partnerships are strengthened and new ideas are being explored. Plans are in place to further training for current county staff based on self-assessment of needs and using the Aging Competencies. We expect the number of CalSWEC Aging Initiative Interns will increase to seventy-four next year. Twenty-eight will be funded by the Archstone Foundation and forty-six will be community stipends or traineeships.

The CalSWEC AI Labor Force Survey Team is doing the essential and fundamental groundwork with the key survey participants to insure good response rates and quality data. This survey will allow the Aging Initiative to address important areas of inquiry regarding current and future work force needs and the policy decisions surrounding those needs.

Much of our work is based on the outcomes generated from the first CalSWEC Aging Summit (October, 2004) and continues to shape our goals. For a summary of the Aging Summit please go to http://calswec.berkeley.edu/indexAging_Summit.html. As we look forward to the development of legislative and public education/image committees we will continue to strengthen the partnerships with the NASW, California Chapter and CWDA who have been strong supporters of our work.

Indeed, it is evident that as the public needs of an aging society move to the forefront we need to seek ways to partner with all groups who will experience the effects of this dramatic population shift. Within the CalSWEC organization our leadership is already strategizing on how to evaluate our common interests and manage the resources available. The Aging Initiative is also actively pursuing funding and resource sharing opportunities with others to fund labor force development in order to increase the quality of care for older adults. We look forward to continued exploration of public funding streams and legislative advocacy.

Our mission is defined; the work is challenging and worthy. We look forward to the coming year and continuing progress.

References

Berg, Patty, (2006). Building an aging agenda for the 21st Century. Assembly Committee on Aging and Long-Term Care. (Online). Available:
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