



SECTION II

Designing and
Implementing
Your HPPAE

The Six Essential Components

In this section we provide a brief description of each of the essential components that make up the HPPAE and reasons that they are educationally effective for recruiting, training, and retaining students in the field of aging. In the following chapters, we will go into more detail about how each component is implemented.

The HPPAE Essential Components Are:

1. University-Community Partnerships
2. Competency-Based Education
3. Field Rotations
4. Expanded Role of Field Instructors
5. Targeted Student Recruitment
6. Leadership

Essential Component 1: University-Community Partnerships

General Description

The university-community partnership is the collaboration between a graduate social work education program and community health and social service agencies that serve older adults and their families. While all field programs in social work education forge relationships with agencies to provide field instruction, most have followed the traditional “top-down” structure in which agencies adopt university educational guidelines to provide students with fieldwork experience.

HPPAE university-community partnerships are intentionally constructed to be more collaborative in

nature, with universities and community agencies acting as true partners in executing the following essential functions:

- Design the HPPAE field education program for students specializing in aging
- Recruit students to the HPPAE
- Oversee implementation of the HPPAE
- Evaluate the program’s effectiveness and revise as needed
- Cultivate and garner resources to keep the program running

Benefits of a University-Community Partnership

The synergy created by the partnerships bridges the traditional “town-gown” disconnects between academic and practice communities, and results in significant gains for all the stakeholders, including students and older adults. Among the benefits:

- Students graduate with a more realistic grounding in real-world settings
- Older adults and caregivers receive qualified care adapted to their needs
- Faculty gain a richer understanding of current service delivery systems, resources, and needs that they can integrate into their curricula
- Agency practitioners learn or update their knowledge of aging and assessment and intervention skills
- Employers gain more “plug-and-play” social workers when they hire HPPAE graduates
- Agencies engage and collaborate more with other agencies as educational partners

SECTION II

Designing and Implementing Your HPPAE

- The partnership can help identify service or knowledge gaps, which may lead to strengthening services and/or commissioning or conducting research

Implementation Guidelines

It may not always be possible to implement all components at the same time. The most important one, however, is the university-community partnership. Once this leadership structure is in place, you will have the foundation to build the other components.

To cement your university-community partnership, take the following steps:

1. Develop a core leadership group. Interest in developing an HPPAE in your local community is likely to start with an individual or a small group of people. The success of the HPPAE depends on this core group's ability to garner a broader base of collaborators and support within the social work school, university, and provider community.
2. Create a university-community partnership. This group is the anchor of the HPPAE, responsible for developing the program and making it a success. Its role is to build consensus, make decisions, and instill a sense of ownership for the HPPAE among university and community stakeholders.

Key members in the partnership may include, but are not limited to, social workers, social work supervisors, agency directors, community activists, consumers, clergy, state and local officials, policy makers, care coordinators, such as geriatric care managers, and students or graduates.

3. Work to build consensus for your rotational model. Secure the input and support of your community agency partners from the beginning as you develop your rotational model. This early buy-in will make adoption and implementation of the model easier in the long run.
4. Identify additional field sites. Work with your field education office to determine additional field sites that serve older adults beyond the agencies that are formal members of your university-community partnership. The HPPAE is an opportunity to approach new agencies or reengage with field agencies that may not have recently had students. Your field education office is a key stakeholder too, and should be consulted regarding placements for HPPAE students.

→ Go to the Implementation Section of www.hartfordpartnership.org:

- [Organizational Chart Sample](#)
- [Timeline for Start-Up Year Sample](#)

Essential Component 2: Competency-Based Education

Generation Description

The HPPAE model is grounded in a series of geriatric social work competencies developed by social work and aging experts from across the country and field-tested at demonstration sites. These competencies are fully aligned with the Council on Social Work Education's (CWSE) new Educational Policy and Accreditation Standards (EPAS).

Graduate field education programs are already guided by a set of general competencies that reflect each program's philosophy, theoretical base, and structure. The HPPAE's field-based competencies build upon this foundation by deepening students' expertise and experience in geriatric care. The HPPAE competencies are also used to guide and evaluate both the program and student learning, including the selection of agencies as field sites and the learning assignments in those sites.

Benefits of Geriatric Social Work Competencies

An important characteristic of these competencies is that they address practice at both micro (direct service) and macro (policy, research, and advocacy) levels. Most MSW students focus on only one of these areas of practice. Social workers who demonstrate leadership in aging, however, need to be proficient in both areas, due to the complex and fractured nature of aging-care services and resources.

- Geriatric social workers who provide direct service must become proficient in identifying service gaps, assessing community needs, and developing programs to help older adults and their caregivers cope with aging.
- Macro practitioners cannot be effective in their work without firsthand knowledge of the challenges that older adults face, as well as this population's considerable assets.
- The HPPAE fosters students to think about systems at both levels. It also encourages them to come up with ways to improve services across multiple settings.

The HPPAE's Geriatric Social Work Competencies fall into four general categories. For a full description of each competency, see the Appendices.

1. **Values, Ethics, and Theoretical Perspectives:**
Teaches students how to assess values and biases regarding aging and address the cultural, spiritual, and ethnic values of clients, as well as the ethical principles involved in making decisions, including end-of-life issues.
2. **Assessment:**
Covers developing interviewing skills and conducting geriatric assessments of older adults' needs, strengths, and limitations, including their cognitive, physical, and social functioning. Students also learn to assess the needs and stress level of caregivers.
3. **Intervention:**
Develops competency in establishing rapport and effective working relationships with older adults and family members, from helping caregivers reduce their stress level to educating families about wellness issues and disease management.
4. **Aging Services, Programs, and Policies:**
Covers outreach to older adults and their families to ensure the appropriate use of services, including budgeting, evaluating service effectiveness, and advocating and organizing with service providers, community groups, and others on behalf of older adult needs and issues.

Implementation Guidelines

The Elements of Competency-Driven Approach

In an HPPAE, the geriatric social work competencies described above are integrated into a competency-driven approach to graduate geriatric social work education.

SECTION II

Designing and Implementing Your HPPAE

This approach, developed and refined by a working group of national experts in aging and social work, requires the following five elements:

1. Adopt HPPAE competencies for geriatric social work education
2. Identify individual student learning goals
3. Select field sites, rotations, and assignments
4. Integrate class and fieldwork learning
5. Assess student skill level and progress

Below are guidelines for implementing these five elements:

1. Adopt HPPAE competencies for geriatric social work education:

One of the university-community partnership's first tasks is to review, agree upon, and implement the HPPAE competencies. To be truly effective, this commitment should be shared by all faculty, field instructors, and student advisors in aging, including those who may not participate formally in the partnership.

→ [Go to the Implementation Section of \[www.hartfordpartnership.org\]\(http://www.hartfordpartnership.org\):](#)

- [Geriatric Social Work Competencies](#)
- [Older Adult Service Matrix](#)

2. Identify individual student learning goals:

Using the competencies as guidelines, students must work with field educators to identify and tailor their learning goals, which are drawn up as a formal Learning Agreement. These goals provide the basis for:

- Structuring learning assignments
- Selecting agency placements
- Facilitating assessment of student progress

Field instructors, field directors, faculty advisors, and field liaisons should all use the same set of competencies to provide students with a comprehensive, integrated educational experience.

→ [Go to the Implementation Section of \[www.hartfordpartnership.org\]\(http://www.hartfordpartnership.org\):](#)

- [Learning Agreement Sample](#)
- [Student Certificate of Completion Template](#)

3. Select field sites, rotations, and assignments:

Identify and engage field sites that can provide students with practicum experience developing expertise and leadership in geriatric social work. Field site rotations should develop core competencies, including:

- Expertise in aging care—the knowledge and skills that are specific to the older adult demographic across the spectrum of aging
- Skills in comprehensive geriatric assessment using standardized assessment instruments
- Experience working with older adults of diverse backgrounds, including different levels of independence, need, and ability

→ [Go to the Implementation Section of \[www.hartfordpartnership.org\]\(http://www.hartfordpartnership.org\):](#)

- [Sample Rotational Models](#)

SECTION II

Designing and Implementing Your HPPAE

4. Integrate class and fieldwork learning:

Using the same set of competencies across both classroom and field learning is essential to an effective HPPAE educational program. To ensure that there is class and field integration, we recommend the following steps:

- a. Identify course content that relates to competencies. Review syllabi of aging courses against a list of the competencies. Also, talk to faculty and students about how much aging content is discussed in class.
- b. Identify areas in which the course content is adequate and areas that require improvement. A number of strategies can help integrate competencies into classroom instruction:
 - Meet with faculty to discuss ways to include more content
 - Survey faculty to determine what they might need to strengthen the curriculum
 - Develop teaching modules and distribute to faculty
 - Develop educational resources and distribute
 - Develop and advertise a speaker's bureau in aging
- c. Create seminars to link competencies with classroom and field learning. Seminars are common vehicle in field education; they integrate classroom learning with field learning. The seminars are designed to:
 - Be enrichment opportunities with a focus on didactic presentation of aging topics that might not be covered in the classroom or by field instructors

- Foster critical thinking about the relationship between theoretical learning in the classroom to practice learning experiences in the field
- Rotate among the field partners so that students have the opportunity to learn about different agencies, their clientele, and services
- Be attended by field instructors and agency staff, thus fostering partnership between the sites as well
- Encourage a shared sense of professional identity among students through contact with other professionals in the field

→ Go to the Implementation Section of

www.hartfordpartnership.org:

- [Student Learning Plan Sample](#)

Guidelines for Designing Seminars

Most social work programs already have field seminars in place, which can be modified to include HPPAE seminars. Below are best practices from HPPAE seminars that were well-received by both students and field instructors:

- **Balance the format.**
Strike a working balance between didactic and interactive. Be attuned to the preferences of each cohort of students.
- **Don't overlap content with other classes.**
This will require some advance coordination with faculty and perhaps more creativity in identifying topics for seminars that are both highly relevant to practice and not already covered in courses.

- **Be sensitive to busy schedules.**

Schedule seminars and other meetings with an eye not to overburdening the field instructors. Poll instructors for the timing interval that works best for them and their students.

- **Location matters.**

Ideally, seminars should be held at agencies within the partnership to give students the opportunity to learn about different services, populations, and practitioners. Geographic challenges, however, should be taken into account. For example, traffic in heavily populated areas or remote rural areas may discourage participation.

→ [Go to the Implementation Section](#)

of www.hartfordpartnership.org:

- [Seminar Syllabus and Schedule Sample](#)

5. **Assess student skill level and progress:**

The last element of the HPPAE competency-based field education is assessing students' progress in meeting their learning goals and the skills necessary to work with older adults. Students are evaluated before beginning their internship and upon completion.

Students use the HPPAE Geriatric Social Work Skill Competency Scale II to rate themselves on each program competency on a 0-4 scale (0=not skilled, 4=expert skill). We have found that the scale did not produce what is known as a "ceiling effect." That is, students did not rate themselves at the top before or after their internship, yet the scores showed that the students made considerable progress.

Educators and field instructors can use the scale to assess students' skill levels, as well as to:

- Assess the strengths and challenges in the education program itself. You can enhance your seminar planning and address curriculum changes with base knowledge of where your students' skills are strong and where they need improvement.
- Help students plan their learning experiences. For example, after students took a pretest in certain initial sites, field instructors discussed the results with them and planned their learning experiences according to areas where they needed to improve their skills.

→ [Go to the Implementation Section](#)

of www.hartfordpartnership.org:

- [HPPAE Geriatric Social Work Skill Competency Scale II](#)

Essential Component 3: Field Rotations

General Description

Rotations, or placing students in multiple agency settings, have been used to a limited degree in social work agencies (primarily large hospitals), but are used extensively and successfully in other disciplines. The traditional model of field education assigns students to one agency and one supervisor over the course of a year, which typically results in their working with one specific population of older adults. By contrast, the HPPAE rotational model assigns students to two or more field settings during the yearlong internship period, giving students a more comprehensive and dynamic view of the field.

SECTION II

Designing and Implementing Your HPPAE

The rotational model for students in aging can be implemented in many different ways, but there are some “musts.” Each rotation plan must be:

- Consistent with an MSW program’s educational philosophy and objectives
- Structurally viable for the characteristics of the social work educational program and agencies in the community aging network
- Responsive to students’ learning needs

Benefits of a Rotational Model

There are several reasons why the HPPAE rotational model enhances student education. Students gain:

- **Exposure to the diversity of older adult clients.** They learn that there is no “typical older person” because older people differ in mental and physical health status, activity and functioning levels, educational levels, economic status, ethnicity, social support networks, and personal care needs. This helps students counteract cultural stereotypes and gives them a richer sense of the many ways that social workers can work with older adults, from organizing health promotion to providing grief counseling at end of life.
- **Improved mastery of today’s complex health-care and social-service systems.** By working across different settings, students gain a more sophisticated understanding of how the health-care system works. That is, how services and care are provided and connected via a complex service network, each with its own funding sources

and definitions of eligibility criteria, benefits, and administrative structures.

- **Greater understanding of and exposure to roles of multiple service providers.** Two trends, the increasing specialization of the medical field and the longevity of older adults, require geriatric social workers to understand the roles of each profession—nurses, doctors, rehabilitation therapists, psychologists, lawyers—as members of an interdisciplinary team. Students also work with multiple field supervisors and instructors, exposing them to different leadership and supervisory skills.
- **An informed perspective on policy reform.** Strains on the aging-care system, from the workforce shortage to access and cost challenges, require policy reform on many levels. Students who have worked across different settings are more likely to have a richer analysis of reforms that are needed, and of the systems involved, equipping them to play leadership roles in policy debates and initiatives.

Implementation Guidelines Internal vs. External Rotation

There are two types of potential student rotations in the HPPAE:

- **Internal Rotation**, in which students stay in one agency and rotate to different administrative units, programs, or services within that agency. An example would be a hospital or agency that offers multiple programs or services to different aging

SECTION II

Designing and Implementing Your HPPAE

populations through separate administrative units. Students divide their time between departments, either concurrently or sequentially.

- **External Rotation**, in which students are placed in two (or more) separate, distinct agencies, either concurrently or sequentially for the academic year.

Where possible, the HPPAE recommends external rotations because they offer a richer learning experience for students by:

- Introducing students to a broader variety of administrative structures and policies and providing direct service to a wider range of older adults with different functioning capacities
- Helping students learn how critical practice skills are used across agencies, and how agency structure, in turn, impacts services to clients
- Strengthening students' practice and preparing them to join the workforce

The “Hub Site” and “Block” Approach

Many HPPAEs that use either internal or external rotations have also adopted one of two approaches to implementing those models:

“Hub” Approach

This approach is defined by the idea that students have a permanent “home base” agency where they are placed for the duration of the school year. They are assigned a primary field instructor at their “hub” agency and complete their rotations concurrently—either internally or externally.

- **Hub External Rotation:**
While maintaining a home agency, students rotate to a different agency for a day or two per week. The task supervisors at these sites do not necessarily need to be MSWs, thus allowing for an even wider array of possible agency partners.
- **Hub Internal Rotation:**
Students may be assigned to a VA hospital’s psychiatry department as their “home base,” then rotate to the VA’s rehabilitation department and/or [?] primary care department a day or two per week where they work with task supervisors.

“Block” Approach

Under this approach, students are placed in different settings on a consecutive basis for discreet blocks of time, whether the settings are at different agencies (external rotations) or in different departments within the same agency (internal rotation).

- **Block Internal Rotation:**
A student assigned to a VA hospital may spend 10 weeks at the hospital’s psych department, 10 weeks at the rehab department, and 10 weeks in primary care.
- **Block External Rotation:**
A student may spend 10 weeks at a VA Hospital, 10 weeks at the Alzheimer’s Association, and 10 weeks at a state Department on Aging.

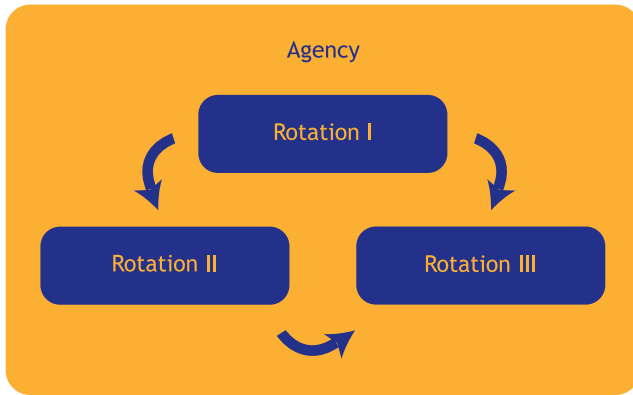
→ Go to the Implementation Section of www.hartfordpartnership.org:

- [Rotational Model Samples](#)

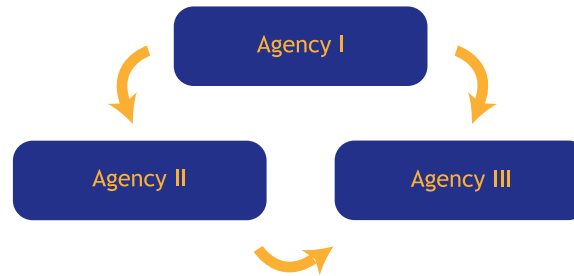
SECTION II

Designing and Implementing Your HPPAE

Block Internal Approach



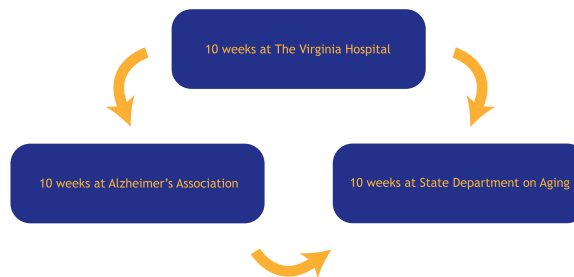
Block External Approach



Block Internal Example



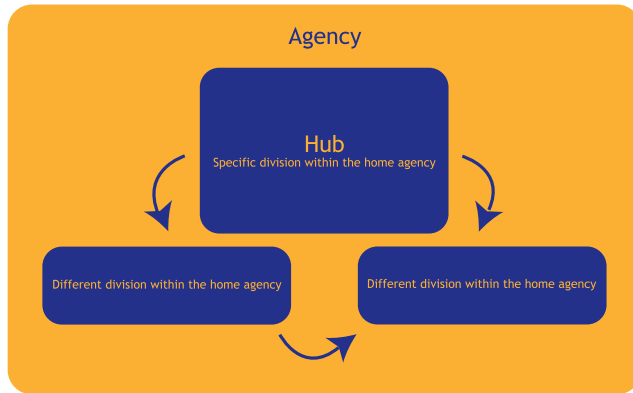
Block External Example



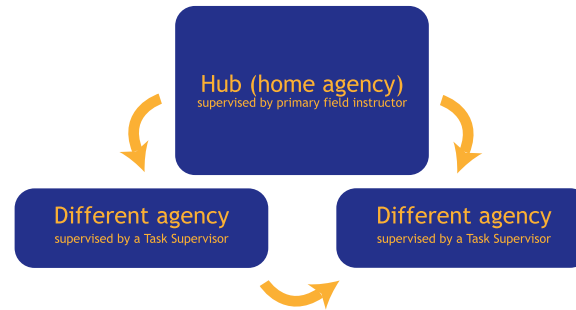
SECTION II

Designing and Implementing Your HPPAE

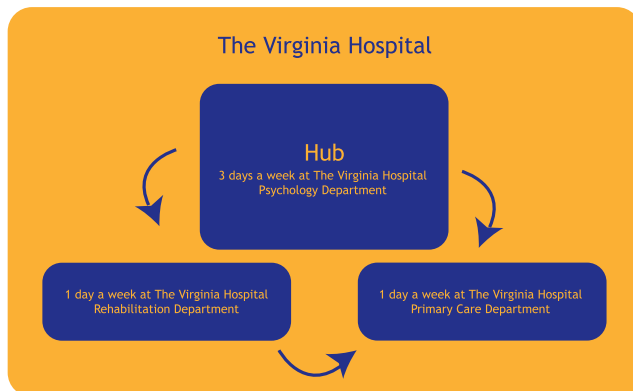
Hub Internal Approach



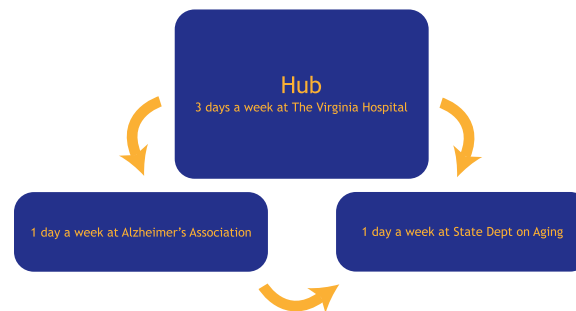
Hub External Approach



Hub Internal Example



Hub External Example



Rotation Planning: Who's Responsible?

The person assigned to manage student internships, including planning rotations, varies from program to program. The point person can be the field director, a faculty member, or a field instructor at a community agency. This person must:

- Understand the rotational model
- Be knowledgeable about the competencies
- Be aware of the options for agency rotations
- Respect student knowledge and skill levels

Rotation Design: What Works?

The HPPAE model represents a departure from the traditional social work education placement model. HPPAE's "rotation" approach can be a particularly challenging component to implement. A common concern regarding the rotational model is its impact on continuity of patient care and the development of clinical skills necessary for licensing and employment. Existing programs have met the challenge in varied ways, including:

- Spreading the HPPAE over two years, with rotations over both years or a series of rotations in the first year and a single placement in the second
- Instituting a series of sequential rotations (7-12 weeks each)
- Implementing rotations within a large, multifaceted agency (e.g., the Veterans Administration) that offers a range of services and learning opportunities
- Creating a "hub" model, whereby students get more extensive experience at one or two "primary" sites and more limited exposure at other "secondary" sites

Four Steps to a Successful Rotation

To implement the HPPAE rotational model successfully, follow these four important steps:

1. Educate faculty, staff, and partnership members

Every member of the partnership and its affiliates should understand the concepts and rationale for the HPPAE rotational model. Below are strategies for reaching out to two of the core constituents:

Outreach to Faculty

It is important to educate and engage academic and field faculty who are not directly involved in your HPPAE because:

- They play an advisory role in planning students' learning goals and experiences.
- They will be better prepared to lead classroom discussions when students talk about experiences from the field.

You can inform and engage faculty in individual meetings or group sessions where they have an opportunity to discuss their concerns, issues, and roles. Content for these forums should include:

- A rationale for using the rotational model with students in aging
- A clear relationship of the model to current practice realities
- An explanation of the range of services in the service sector
- Examples of how to plan rotations with students using the competencies

SECTION II

Designing and Implementing Your HPPAE

- An explanation of the relationship between the field rotations and classroom learning

Outreach to Community Agencies

It is also essential to educate community agencies that serve older adults about the benefits of the HPPAE. This is the first step to recruiting them to be part of the program in their community. These agencies may already be field sites of your school or they may be agencies your school has not historically engaged.

Your outreach should:

- Anticipate that many agencies may initially shy away from the model because of their perception that the HPPAE involves extra work—that the rotations will translate to insufficient time to work with interns or that client care will suffer
- Make the case that by being a part of the HPPAE, they are playing an important role in recruiting and training the future workforce, giving students a bigger picture and more sophisticated outlook of the health-care system, and getting direct exposure to a larger and better trained pool of potential future employees

2. Select agencies to be field sites

Keep these guidelines in mind as you select your field sites:

- The agencies in your university-community partnership will likely serve as field sites for student rotations, but field selection need not be limited to them. Additional sites could be:

Organizations outside the traditional aging network that reach specific communities or populations, such as ethnic groups

Advocacy or policy agencies that have not previously participated in educational ventures

- A site that agrees to be part of the partnership and help implement the HPPAE may not have a placement each and every semester or quarter for students, but may wish to remain actively involved in the partnership.
- A site that wishes to have students placed with them may not take on an active role within the partnership.
- Agencies without MSW-qualified field instructors may also serve as field sites, as they reflect certain workforce settings that may employ social workers who report to non-social workers. In cases like these, however, an offsite MSW-qualified professional from the same or another partnership agency would need to serve as the field instructor.

Criteria for Selecting Agencies for HPPAE Rotations:

Select a wide range of agencies across the aging-care continuum to provide students with good learning opportunities and to ensure adequate representation of the service sector.

The ideal HPPAE agencies fulfill the following:

- Provide services to older adults
- Have an interest in helping to educate social workers

SECTION II

Designing and Implementing Your HPPAE

- Have experience educating students—you may select agencies that do not have this history, but anticipate that they will need extra support
 - Understand rotations and are willing to participate fully, through work with other agencies and the MSW program via attendance at trainings
 - Employ support staff that is interested in educating students by enlisting them in being field instructors, task supervisors, or preceptors
- 3. Individualize rotations based on students' learning goals**

Learning goals and rotation plans must be tailored to the individual student because not all students have the same background, level of education, or experience in aging. Some students may have worked in a nursing home or in adult protective services prior to returning to school; others may have provided home care to their parents or majored in gerontology in an undergraduate program. Field learning needs to strengthen and supplement knowledge and skills, not duplicate them, and connect back to the competencies.

A planning discussion should include:

- A review of competencies
- An assessment of student objectives and experience in relation to the competencies
- A review of agencies available as field sites

Tools that are useful in talking to students about field rotations include:

- The Geriatric Social Work Competencies
- The Older Adult Service Matrix
- A list of agencies available for rotations

Designing a Rotational Model: Essential Questions

As you design a rotational model for your HPPAE and for each individual student, use the following questions as guideposts:

- a. What configuration of field placements facilitates the development of all necessary knowledge and skills?
 - Which competencies can be gained at each potential placement site?
 - How long and how often should a student be at a site to gain specific competencies, while meeting the expectations of the agencies?
 - What number of rotations is feasible? What number is optimal? Should rotations be implemented over one or two years?
 - Is there sufficient staff time and support to organize and oversee a particular rotational model?
- b. Should the rotations be sequential, concurrent, or a combination of both?
 - How should the combination of rotations be structured?
 - Should combinations be fixed or individualized?
 - Should there be stratification of rotations (e.g., a primary and a secondary, a primary and multiple secondary sites)?
- c. Which mechanisms need to be established to ensure appropriate communication and supervision?
 - Are there appropriate and sufficient communication mechanisms between rotation sites?
 - Are there appropriate and sufficient communication mechanisms between the school and the sites, regarding student supervision, curriculum content, and other issues?

SECTION II

Designing and Implementing Your HPPAE

- How are students supervised at each of their rotations? Are staff members qualified to serve as field instructors? Is there a need for task supervisors in addition to field instructors?

Input from agency and field placement staff is essential to the design of the rotational model. Once implementation is underway, mechanisms for feedback—including feedback from students—must be established.

Rotations in Rural Settings: Factors to Consider

Rural settings present unique challenges to the rotational model:

- The low population density requires that social workers and services provide for the full spectrum of aging, from high functioning and active to end-of-life
- Few agencies are likely to have a specific aging focus
- Students in rural areas must have generalized knowledge and skills to meet the needs of potential employers
- With fewer agencies overall, there are likely to be fewer agencies employing staff with appropriate credentials to serve as field instructors to social work students
- Travel to school and multiple agencies may place a practical and financial burden on students

Despite these challenges, highly successful HPPAEs have been developed in rural areas. Strategies include:

- Primary placement at a large or primary umbrella organization (e.g., an Area Agency on Aging), through which rotations can be organized—possibly by agency staff

- Primary placement at a site with a staff person qualified and willing to serve as field instructor while the student is on site and while on rotation; at the secondary site, a “task supervisor” oversees the students work
- Scheduling classes on consecutive days, so that students can spend the remaining days in the vicinity of their practicum

Setting Learning Expectations

Expanding the number of practicum sites results in reduced time spent at each site. Consequently, HPPAE students may be unable to fulfill each of the job functions that would be expected of social work students in a traditional practicum. Satisfaction with the rotational model, therefore, necessitates a change in expectations. Satisfaction is likely to be greater where:

- Agencies, students, and schools see the practicum as a rich, competency and skill-based learning opportunity, rather than a means for students to learn to perform a particular job
- Academic preparation and administrative requirements are responsive to reductions in the practicum duration (e.g., fingerprinting and TB testing is done by the university in advance of the placements)

4. Orient students to agency before placement begins

Students must know the basics of how rotations work before their first day of fieldwork. Prior to starting any internship, students should receive a program orientation that includes information about:

- How this model differs from the traditional model but remains focused on building practice skills
- How best to take advantage of the diverse learning experiences
- Who to talk to about concerns and problems
- How seminars and other program elements relate to rotations
- Other students in rotations

Several HPPAEs have students participate in a summer internship, class, or seminar that orients them either to their primary agency placement before actually starting the formal internship or to the HPPAE as a whole. Other programs have involved the students in creating their rotations—either by choosing among already established groupings or by creating a new site through their own initiative.

Essential Component 4: Expanded Role of Field Instructors

General Description

The field instructor traditionally plays an important role in educating social workers. In the HPPAE, that role is even more essential because students are rotating through multiple settings, which increases the potential for learning to become disjointed. This is why HPPAE field instructors have expanded responsibilities beyond those traditionally associated with their profession. The traditional responsibilities are:

- Orient students to the agency
- Develop learning contracts with students
- Develop, coordinate, and supervise assignments
- Create a plan to evaluate students' performance and collect feedback

- Mentor and model for geriatric social work practice
- Facilitate students' professional growth

Additional responsibilities under the HPPAE are:

- Direct and coordinate student learning across programs and agencies
- Participate in the university-agency partnership activities
- Participate in HPPAE integrative seminars as leaders, expert commentators on case situations, and instructors
- Consult on education and training in field agencies

HPPAE field instructors may also be asked to:

- Teach in the classroom as guest speakers on special topics in aging in foundation courses or aging-specific courses
- Serve as adjunct instructors for aging courses
- Give lectures or talks at brown-bag lunches for all MSW students to educate and interest them in topics on aging

Benefits of the Field Instructor's Expanded Role

In the HPPAE model, field instructors make important contributions to the educational program beyond working directly with students in the field. Field instructors can:

- Bring their years of experience and knowledge of practice realities and service-system issues, as well as program planning and management skills
- Help recruit students by being role models and living proof that working with older adults is rewarding

SECTION II

Designing and Implementing Your HPPAE

- Encourage agency staff with undergraduate degrees to apply to the MSW program, thereby upgrading the level of skill in agencies

Implementation Guidelines

The field instructor oversees the continuity of the student's internship and learning by fulfilling these tasks:

- Plan student rotations, focusing on learning goals in relation to competencies; primary field instructors (along with field directors, liaisons, and advisors) help students identify and arrange for these goals and oversee related assignments in these settings, which may include a program or agency other than the one in which they are employed
- Direct and coordinate the students' experience; in the HPPAE model, field instruction is a team effort that is led by primary field instructors charged with keeping communication open between practitioner-educators, faculty, students, and other members of the HPPAE
- Orient students to rotations and other facets of the HPPAE
- Help students understand the relationship between their rotation agencies and service providers with the aid of the Older Adult Service Matrix
- Set parameters and expectations for student learning experiences based on program goals or best practices in geriatric social work
- Be involved in discussions around curriculum and seminars, and participate in seminars organized

by faculty and/or field directors that integrate classroom and field learning

- Track and assess student progress using the HPPAE Geriatric Social Work Skill Competency Instrument II
- Oversee additional practitioners ("task instructors" or "task supervisors") who are essential to ensuring that students have real-world practice opportunities in diverse settings. In their settings, these additional practitioners or instructors can:
 - Participate in development of learning contracts
 - Orient students
 - Plan assignments
 - Supervise day-to-day work of students
 - Contribute to student evaluations

Note on educational coordinators: In some agencies, especially those with multiple programs, a practitioner might fulfill the role of "educational coordinator" without being a primary field instructor. This option allows one individual to take over the planning aspect of rotations and the primary field instructors to concentrate on the rest of the coordination.

Incentives for Field Instructors

Because the model asks field instructors to expand their traditional scope of work, it is important to understand and speak to the incentives that may motivate them to take on these additional responsibilities. Field instructors who participated in the initial HPPAE demonstration sites role cited the following as effective incentives for taking part:

- Stronger connection to the university and the benefits that come with having an academic affiliation
- Increased opportunity to collaborate with others in the field of aging
- Greater networking opportunities to share resources and best practices
- Challenges of adopting new responsibilities, including negotiating student time and assignments and increased exposure to inter-agency politics
- Greater opportunities to teach

Special Education Training for Field Instructors

Offering special educational training for the field instructors connected to this program is a key to success for your HPPAE. These trainings will help:

- Ensure that the field instructors are experts in the HPPAE model
- Strengthen the field instructors' expanded role
- Ensure that field instructors and students share clear learning expectations based on the students' capabilities
- Offer field instructors the opportunity to provide feedback to the university
- Foster a better university-community partnership and enhance the connection between field and classroom work

→ Go to the Implementation Section of www.hartfordpartnership.org:

- [Engaging Field Instructors and Task Supervisors: Lessons Learned](#)
- [Certificate of Appreciation for Field Instructors Template](#)
- [Certificate of Training Completion for Field Instructors Template](#)

Essential Component 5: Targeted Student Recruitment

General Description

Recruiting students to the field of aging remains a challenge, partly because of persistent biases and assumptions that many people have toward older adults and geriatric work. While the HPPAE model works to dispel these misperceptions, university-community partnerships should be prepared to make active student recruitment an essential part of the program. Student recruitment is most successful when these principles are in place:

- A school-wide commitment to geriatric social work education by the dean, faculty committees, admissions, and development office. A close partnership between the field education office and the school's admissions office is crucial.
- At least one faculty member who will "champion" the HPPAE and the importance of geriatric social work as a profession and who will focus specifically on recruitment over the long term.
- Understanding that recruitment is an ongoing, yearlong activity—and that it gets easier after the first year of your HPPAE. Eventually, your recruitment strategies will become institutionalized in your annual marketing and outreach activities.

Benefits of Student Recruitment

Proactive recruitment will go a long way in attracting the best and the brightest to the field, creating an ever-widening network of HPPAE students and graduates who can act as ambassadors for the program and strengthen the geriatric workforce.

SECTION II

Designing and Implementing Your HPPAE

Implementation Guidelines

When Recruitment Should Begin

Student recruitment should be addressed as early in the process as possible, ideally before fall semester placements are made.

“While in the HPPAE program I was able to learn in three different agency settings, for-profit, nonprofit, and working with older adults. This model also forced me to step outside of my comfort zone, to learn in new and different ways. It challenged me to speak up, take initiative, and learn fast.

As I learn more each day about what it means to be a leader, I look back and am thankful for the dynamic experience I had in the HPPAE program. I know that the HPPAE program is the foundation on which I am building as I move onward and upward in my geriatric social work career.”

— Lisa Tatge, HPPAE Graduate, University of Iowa School of Social Work

Who to Involve in Recruitment Efforts

Successful recruitment is a group effort that can involve:

- Field instructors
- Directors of admission
- Current HPPAE students
- HPPAE graduates employed in the field of aging
- Deans
- Field education staff
- Admissions committee members
- Development officers
- Publication staff

- Agency staff, including CEOs, field instructors, and other administrative personnel
- Undergraduate program faculty and staff

Setting a Target Number for Recruitment

The number of students in an HPPAE will vary according to the size and interest of the student body, the time commitment of faculty and staff, and the scope of the community partnership. Successful HPPAEs have been implemented with as few as four students per cohort; the mean enrollment for the first two cycles of Hartford-funded HPPAE was seven students.

Profile of a Potential HPPAE Recruit

- Students with knowledge of or interest in aging, possibly including individuals, or so-called “nontraditional students,” who already work in aging but do not have an MSW degree and are interested in applying to a graduate social work program
- Students who are just entering the MSW program and attending orientation, regardless of whether they have selected a concentration
- Students with advanced standing
- Students with strong research skills who appear to be responsible, motivated independent, resilient, and confident

* **Tip:** Interviews and references, including references from prior field instructors and/or employers, should be used in the selection process.

Recruitment Strategies That Work

We have found the following to be the most persuasive “selling points” for encouraging students to apply to the HPPAE:

SECTION II

Designing and Implementing Your HPPAE

Field rotations:

Our research consistently shows that the rotational model especially attracts because it offers opportunities for instruction and immersion in multiple settings. It is also important for participants to hear that, as interns, they will be treated as students, not as employees or substitute staff.

Stipends:

The availability of stipends (or fellowships) is a critical factor in getting students interested in geriatric social work. The amount of stipend may vary from school to school—stipends at existing HPPAEs have ranged from \$1,500 to \$7,500. They should be at a level necessary to secure and motivate, rather than establish, program interest. To determine the right amount for your HPPAE, assess:

- Tuition and other university, educational costs, as well as local cost of living expenses
- Stipends in other fields of practice; often, stipends in child welfare and mental health are quite high and easily attract students
- Availability of stipend funds from schools, agencies, and other organizations that may be willing to offer support to attract good students

Peer endorsements:

Word-of-mouth testimonials from former and current HPPAE students are extremely influential. Many schools have second-year HPPAE students actively recruit first-year students at field placement days and special events at school and in the field.

Strong instructional support and the HPPAE brand:

HPPAE students also indicated that the opportunity to participate in a specialized curriculum increased peer and field instructor support. Access to specialized resources influenced their decision to specialize in aging, as did being part of an innovative, nationally recognized model.

Job placement or career opportunities:

Once informed, students understand that specializing in aging can position them well in the current and future workforce, given the country's changing demographics. The Social Work Leadership Institute is working to facilitate networks of HPPAE graduates and to connect these graduate networks with employers throughout the country. For details, check out www.socialworkleadershipinstitute.org and a MySpace page exclusively for HPPAE students and graduates: www.myspace.com/swli.

“My HPPAE program was a demanding and intense experience, and it was just a great introduction to the field of aging. I am now a psychiatric clinician at the Acadia Hospital in Bangor, Maine, a nonprofit psychiatric and chemical dependency treatment provider. Whenever I serve older patients, I put my HPPAE learning to use.”

—Mary Kellogg, HPPAE Graduate, University of Maine School of Social Work

Additional Recruitment Strategies

You may also reach out to potential students through:

- Recruitment talks in foundation-year classes
- Information in booths at field placement fairs
- Announcements on HPPAE Web sites and via your listservs or e-mail newsletters
- Brochures mailing to incoming students
- Open houses at aging agencies
- Conferences on aging issues, didactic seminars, and talks by experts in aging
- Promotion of the project in all application materials for school or department of social work or social welfare
- Talks at concentration selection workshops
- Creation of student interest groups
- Formation of Gerontology Student Associations

Reach out to faculty as conduits to the students and as champions of gerontology through:

- Presentations about the project at faculty retreats
- Assisting faculty to incorporate aging content into foundation courses, increasing interest in aging through discussion of aging issues in the classroom

* **Tip:** Existing HPPAEs use a combination of recruitment strategies, tailored to their individual social work programs and needs. We recommend experimenting with combinations of strategies and tracking results (e.g., conducting surveys on how students first learned about your program) so you can refine your recruitment efforts.

→ Go to the Implementation Section of www.hartfordpartnership.org:

- [Certificate of Completion for Students Template](#)
- [Student Application Template](#)
- [Letter of Acceptance Template](#)

Essential Component 6: Leadership

General Description

The future of the geriatric social work profession depends on our current and future generations of leaders whose vision and drive will motivate more students to join the profession and shape aging-care policy for years to come.

Participants in the HPPAE are encouraged and trained to become leaders in the field of social work education and geriatric social work practice. The HPPAE provides different opportunities for leadership, depending on the participant's role:

- For faculty members who initiate an HPPAE program, leadership means both the ability to inspire students to pursue careers in aging care and the responsibility to build a sustainable program—from making the case for support to the school's dean to developing a network of field instructors to mentor your students.
- For deans and directors at schools that have implemented an HPPAE program, leadership means being at the forefront of developing the workforce of social workers to care for America's future and setting an example for other schools to follow in adopting this rotational, competency-based, partnership model of learning.

SECTION II

Designing and Implementing Your HPPAE

- For field directors charged with placing students in agencies through the HPPAE, leadership means being a key liaison between the university and the local community, helping to foster a mutually beneficial partnership that will serve academic, clinical, and public-interest goals.
- For field instructors who direct internships for HPPAE students, leadership means introducing newcomers to the rewards of caring for older adults and dispelling some of the myths and fears about the geriatric professions.
- For students who complete the HPPAE curriculum, leadership means becoming ambassadors for the field of aging care, whether that takes the form of mentoring students, educating colleagues from related professions, or contributing to and influencing public policy to improve aging care.

Leadership Qualities

Regardless of the specific opportunities for leadership that the HPPAE provides, there are certain qualities of leadership common to all leaders and certain activities that social work educators and students can take to advance the issues of aging care.

Theories abound as to what makes a leader, but there are at least five characteristics common to all good leaders:

1. **A leader knows the intended outcome.**
When you ask people to follow you—in launching an HPPAE or any endeavor—you need to know up front what your ultimate goal is, and how you expect people to participate in reaching that goal.
2. **A leader builds collaborations with individuals holding different opinions.**
In academia, as in any business or institution, you will encounter smart people who disagree with your ideas and approach. The key to success is to engage in dialogue and find common ground so that these individuals can become part of, not opposed to, your plans.
3. **A leader doesn't take slights personally.**
When a colleague or peer seems to behave in a disrespectful manner toward you, try not to take it personally. There may be a host of reasons why that person is dissatisfied—some having nothing to do with you, and some related to legitimate concerns that the person has about your leadership style. Work on improving the relationship, not defending your position.
4. **A leader knows what an audience is ready for.**
There is such a thing as a good idea whose time has not yet come. Be sensitive to the assumptions, workload, and habits of the people who you want to follow your big idea. It may take some time to lay the groundwork and make a few internal adjustments before your group or institution can move forward.
5. **A leader is prepared to succeed.**
There is an old saying: “Be careful what you wish for, because it may happen.” Look beyond achieving your goal to how you will sustain it. Put the systems in place to handle success when it comes.

Leadership Activities

There are two critical things you can do as a leader in the field of geriatric social work:

1. Work to improve the perception that other professions (including other social workers) have of the discipline.
2. Become advocates for improved policies that support healthy, independent aging for older adults and support for their caregivers.

Specific activities that HPPAE participants are encouraged to pursue include:

- Develop a macro view of aging care; i.e., connect your understanding of individual client issues to the big picture of policy, demographics, funding, workforce supply, etc.
- Initiate special projects—from developing the idea to finding funding.
- Prepare papers and posters for presentation at conferences and meetings.
- Keep abreast of relevant legislative issues, from tuition reimbursement to health-insurance coverage.
- Polish your communications skills, including the ability to express ideas clearly in writing and on the page and to be a dynamic presenter.
- Get others committed to studying, teaching, and/or practicing geriatric social work.
- Learn how to do policy advocacy at the local, state, and federal level.
- Engage with the media, including writing op-eds and letters to the editor and using your research to pitch stories to the media.

→ Go to the Implementation Section of www.hartfordpartnership.org:

- For developments and updates on leadership-related activities

Getting Started

If you are reading this manual, chances are you are committed to the idea of starting a Hartford Partnership Program for Aging Education in your department or at your school. In this section, we offer:

- Key questions that you will want to ask yourself as you design your HPPAE to test its feasibility and to ensure that you are maximizing local resources and expertise to get the program off the ground
- Guidelines for creating a budget for the first year of the program

Key Questions for HPPAE Design

Questions for Your School or Department:

1. **Where within your school or university are there advocates and champions of aging care?**
 - Who are the aging advocates?
 - Who are the advocates for increased community collaboration and service?
 - Who are the advocates for innovation in social work education?
 - How can these advocates be mobilized in support of the HPPAE?
 - Is there an appropriate institutional (rather than individual-level) base for the program?

SECTION II

Designing and Implementing Your HPPAE

2. **Do you have the human resources necessary to staff the HPPAE? (Keep in mind that the director, coordinator, and evaluator are typically part-time positions.)**
 - Who would be a strong candidate for the director position and what strengths does he or she bring to the program?
 - What are the advantages and disadvantages of having the field director oversee the HPPAE?
 - What are the advantages and disadvantages of having a faculty member oversee the HPPAE?
 - Who would be a strong candidate for the coordinator position and what strengths does he or she bring to the program?
 - Who is best positioned to evaluate the program?
 - What other staffing roles are needed?
3. **What are the educational resources available to ensure that students have sufficient academic training for aging-focused field placements?**
 - Are there classes and/or other educational opportunities available through the school or the university?
 - What needs to be done to ensure that students can and do access these opportunities?
 - How will gaps in the curriculum be filled?
4. **What are the characteristics of social work students with current or potential interest in aging?**
 - How many are there?
 - What are their skills and experience?
 - What are their financial and time constraints?

5. **What resources are needed and available to support the HPPAE?**
 - What kind of staff support is needed and available?
 - What kind of financial resources (including in-kind) are needed and available?
 - How likely is it that these resources will continue to be available?

Questions for Community Agencies:

1. **What are the characteristics of the local aging community?**
 - What is the size of the aging population, relative to other populations?
 - What are the community's characteristics and needs?
2. **Which local agencies have an aging focus or serve a large aging population?**
 - What type of services do these agencies provide?
 - To what extent do they need staff focused only on aging, as opposed to staff with a more generalist knowledge and skill base?
 - What experiences will students likely get at particular placements?
3. **What is their experience with students in general and with social work students in particular?**
 - What is their interest and capacity with respect to field placements?
 - To what extent are they interested in providing training and educational opportunities to students, rather seeing students as inexpensive labor?

Creating a Budget

While there are initial start-up costs in the first year of your HPPAE, many HPPAEs have found that costs decreased once the program became fully integrated in their overall MSW program.

Below is a checklist of key budget “buckets” that you will need to develop and implement your HPPAE. Anticipate that you will require additional resources and time during the start-up phase—the amount will depend on whether your school or agency already has some of the HPPAE components in place, such as student recruitment strategies or strong university-community relationships.

Human Resources

- Salary for project coordinator (to manage the partnership, help plan rotations, and recruit students): This can be achieved through a new hire, or tasks can be absorbed into an existing staffer at the university.
- Honoraria to recognize agency participation
- Honoraria for field instructors assuming an expanded role, such as classroom teaching and facilitating seminars
- Faculty or field instructor buy-out
- Consultants (i.e., faculty with geriatric experience if none are currently on the faculty)
- Funding for program evaluation

Student Recruitment and Retention

- Stipends/scholarships and/or tuition waivers
- Student recruitment activities: flyers, lunches, presentations at school orientations, and Web site development

- Stipends/salaries for summer internships

Marketing and Outreach

- Marketing materials such as brochures and fliers
- Web site development

Miscellaneous Expenses

- Such as travel, mailings, printing, supplies, and equipment

Resources Calculator: Determining the Amount of Funding You Need

There are numerous factors that may contribute to start-up costs for your HPPAE. Among the most influential factors:

- Whether your school is public or private impacts the overall cost of attending the school
- Whether scholarships are already available to students or can be made available through aging agencies in your community; this will impact student stipends
- Whether you have ample field education department staff to allow a staffer to take on the role of HPPAE coordinator, or you will need to hire new staff
- Whether your school has faculty with aging expertise or you will need to bring in an expert for seminars and classwork

Calculating Related Costs

After you have determined the resources you will need to support your HPPAE, use the guidelines below to calculate the related costs:

To calculate your total stipend amount over the next three years:

1. Establish how many students you will train
2. Determine the amount of the stipend you plan to give each student
3. Multiply these two numbers for the total stipend amount over the next three years

To calculate your program costs:

1. Determine the staff (percentage of full-time employee times three years) needed to coordinate and implement the HPPAE
2. Multiply this percentage by the salary of the person expected to coordinate and implement the HPPAE (you need to determine if this is a new hire or an add-on to a current position)
3. Determine any additional incidental costs to establish the program
4. Add the staff costs to your incidental costs for the total program expenses
5. Calculate your total costs
6. Add the total stipend amount to total program support

Funding Formula

1. Calculate Stipend Support

Stipend Support = (number of students to be trained during the three-year period) x (planned stipend amount)

2. Calculate Program Support

Program support = (program coordinator salary over three years [likely a percent of a full time salary] + incidental costs of establishing the program [e.g., local travel, meeting expenses, field instructor honoraria, etc.]

3. Calculate Total Support

Total Support = Stipend Support + Program Support

Crude Cost Estimates: Guidelines

Use these rough figures as guidelines to calculate personnel costs:

.42 FTE of PI = \$33,000 in the first year of the program

.50 FTE of program coordinators = \$22,500 in the first year of the program

.20 FTE for admin support = \$5,000 in the first year of the program

Other Than Personnel Services (OTPS) costs: Existing HPPAEs have found that there is an average of \$8,758 in OTPS costs during the planning and implementation phase of the program (generally pre-enrollment through Year1). These costs include postage for mailings to students and agencies, development and printing of

flyers, logistical costs such as room rentals and food for partnership meetings, travel to conferences, and Web site development fees.

→ [Go to the Implementation Section](#)
of www.hartfordpartnership.org:

- [Budget Sample](#)
- [Student Financial Contract Template](#)

- An Alumni Leadership Component that recruits HPPAE alumni to participate in an advisory capacity or as field instructors

Adding or Adapting Components

You may elect to add or create additional components to the HPPAE Essential Components tailored to your setting. For example, you may decide to add a component because you want to:

Commit resources to serving a particular population (e.g., low-income older adults)

Offer a specific type of service

Fill an important education gap that your MSW program does not provide

Below are some sample additional components that HPPAE demonstration sites chose to adopt:

- A Public Service Component that operates exclusively in county departments of aging
- A Faculty Stipend for summer internships at an agency of the faculty member's choice; the internship updates faculty on current geriatric practice and encourages them to integrate that knowledge into the courses they teach
- A Job Placement Component to help graduates find employment in the field of aging; this component may include a job bank and/or career counseling