Helpful Conversations

(Part 6)

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CHAPTER 13: *Professional Competences*

So far, we've thought about the range of helpful conversations and set out a framework that helps us understand and evaluate them in detail. How then do we set about acquiring all these competences ourselves? Well, the first step is identifying the individual competences practitioners need to do the job. They follow below. It seemed helpful to list them in a chapter of their own for easy reference. Of these, the core competences are those toward the end, which concern issues of reflective practice. More about this in the next chapter.

Individual Competences

- Be aware of and follow current legal requirements for professional practice.
- Work to professional, ethical and best practice guidelines and, where appropriate internal guidelines.
- Competence in support employees and the organization is linked to an appreciation of the demands of working with other people and within organizational systems.
- Demonstrate the ability to be able to reflect on their individual practice in relation to the context of the system within which they operate.
- Consider the objectives of your organization and adapt their work accordingly.
- Appreciate the organization's structures, culture and dynamics and the impact this has on (a) individual (b) teams (c) managers and (d) the provision of the service offered
- Be familiar with organizational and departmental policies, procedures and protocols, conventions and customs and where appropriate implement or work within them. Use systems feedback mechanism as appropriate.
- Deliver and evaluate support services with a realistic understanding and representation of strengths, abilities and resources.
- Be clear on their own role(s) and remit(s) and manage multiple roles, role conflicts, and multi-cornered client contracts.

- Maintain appropriate levels of confidentiality within overlapping systems of information.
- Work effectively in formal and informal teams in a variety of roles demonstrating an awareness of attitudes and expectation of others an ability to communicate effectively and get on well with colleagues.
- Collaborate appropriately with internal and external colleagues and specialists, taking into account the need for written and verbal communication to be clear and comprehensive with the aims and nature of the purpose clearly expressed with no careless mistakes and evidence that the outcome has been given careful consideration.
- Identify social trends relevant to their work and respond without prejudice.
- Advocate and encourage the wider acceptance of equality management. Activities may include role modeling non-judgment behavior, coaching, mentoring and awareness raising.
- Work with a broad range of client issues without social prejudice, ethnocentrism and authoritarianism
- Support managers and employees during periods of absence from work
- Work within the equal opportunity legislative framework
- Awareness of organization's policy and practice on diversity and ensuring adherence to its principles in the context of employee and organization support work.
- Support both perpetrator and victim in situations of alleged harassment and bullying.
- Promote useful and productive relationships within teams, enhancing the quality of relationships between people.
- Identify the barriers to effective communication within the organization and team and implement appropriate strategies for resolution (e.g. coaching, facilitation and/or mediation).
- Support and suggest strategies for resolving conflict in teams, demonstrating sensitivity to the overall needs and expectations with an awareness of team member feelings and the ability to handle difficulties in relationships constructively.

- Deal with and provide ongoing support for the emotional impact of change (e.g. organization restructuring, downsizing, re-deployment, and changes in work practice or layoffs).
- Form appropriate professional / helping relationships demonstrating the ability to be: sensitive to the values held by the client and self; the capacity to accept others with the absence of social prejudice, ethnocentrism and authoritarianism; the capacity to tolerate strong or uncomfortable feelings in relation to the client without being personally diminished.
- Contract appropriately with clients, colleagues, and managers demonstrating secure personal boundaries.
- Use communication and helping skills as appropriate to the nature of the interaction, in accordance with professional standards as they apply to: client note taking, report writing, interviewing, information gathering, advice and guidance, counseling, feedback, presentations, coaching, mediating and conflict resolution.
- Work effectively with a range of communication modalities: face-to-face, telephone, written work, emails, reports, forms and questionnaires.
- Work with a range of constellations of clients, colleagues and managers, (e.g. individuals, couples, family members, groups, teams and in multi-disciplinary ad hoc meetings, internal and external specialist and agencies).
- Assess and work with a range of client issues, including those of: work pressure or difficulties, personal problems, partner/marital, family, emotional, health & medical, financial, debt, legal — taking into account factors such as psychopathology, psychological development, clients at risk, focusing in depth on stress, loss & bereavement, anxiety and depression, substance abuse.
- Intervene differentially, referring as needed.
- Manage working from a range of physical settings (e.g. own office, 3rd party office).
- Be familiar with a range of theoretical approaches to practice
- Conceptualize practice (e.g. demonstrate the ability to understand and assess: the client's problems; anticipate future consequences of actions;

make sense of immediate problems in terms of a wider conceptual scheme; remember information about the client; cognitive flexibility and skills in problem-solving).

- Keep the client, the organization, and themselves legally, ethically, physically and psychologically safe — demonstrating the ability to monitor and maintain their fitness to practice ensuring work is undertaken safely and seeking appropriate professional support as the need arises.
- Observe evidenced-based best practice.
- Be aware of and describe their personal and interpersonal approach to employee & organization support work.
- Manage their continued personal and interpersonal professional development according to need; linking to relevant theory.
- Manage the ongoing emotional demands of client work and maintain psychological well-being — demonstrating the capacity to use support networks and supervision
- Function appropriately and effectively within the organization. The effects of employee & organization support work on self-management, interpersonal and organizational skills (e.g. stress and time management).
- Personal and moral qualities: the concept of skills captures only one component of competence. Practitioners are also required to demonstrate the following:
  - Empathy: the ability to communicate understanding of another person's experiences from that person's perspective.
  - Sincerity: a personal commitment to consistency between what is professed and what is done.
  - Integrity: commitment to being moral in dealings with others, personal straightforwardness, honesty and coherence.
  - Resilience: the capacity to work with the client's concerns without being personally diminished.
  - Respect: showing appropriate esteem to others and their understanding of themselves.
  - Humility: the ability to assess accurately and acknowledge one's own strengths and weaknesses.

- Competence: the effective deployment of the skills and knowledge to do what is required.
- Fairness: the consistent application of appropriate criteria to inform decisions and actions.
- Wisdom: possession of sound judgment that informs practice.
- Courage: the capacity to act in spite of known fears, risks and uncertainty.

BACP Ethical Framework for Good Practice in Counseling and Psychotherapy p. 2ff

Task No 13

Please record briefly your responses to the professional competences.

CHAPTER 14: *The Core Competence – Reflective Practice*

The Reflective Practitioner

In the previous chapter, we identified a broad range of professional competences needed to support people at work. Some of these are more important and central than others; they are those that contribute towards working as a 'reflective practitioner.'

This term is generally in use in the people and helping professions. It refers to the practitioner's ability to be aware of the moment-by-moment interaction with the client and make conscious choices about and account for how they work.

Need for self-reflexivity

Practitioners' conversations with clients are at all times professional; they therefore need to be considered, theoretically sound and aligned with current best practice. Practitioners also need a framework with which to think about, explain and account for their work. This means being aware of one's practice as it takes place and being able to conceptualize it subsequently.

Emphasis on 'process'

Additionally, fields of work such as employee and organization support are both vast and constantly changing. It's simply not possible to keep all the information in mind one needs to do the job. Further, it's actually more important to 'be with' the client and aware of how things are going moment-by-moment and develop the conversation accordingly. This is referred to as paying attention to the 'process' between client and practitioner. Again, it pre-supposes a high degree of self-reflexivity. Indeed, one might say that reflective, self-aware practice is the cornerstone of all.

Elements of reflective practice

There are three main elements of reflective practice:

- Knowledge
- Awareness of personal resonances
- Sensitivity to process.

- **Knowledge**
  It's important to be up to speed with the relevant body of knowledge, to know the theory behind practice, to be aware of the professional issues and current best practice approaches. That's not difficult to do and mainly requires thoughtful reading and study.

- **Awareness of personal resonances**
  If we are to work with clients empathically and dispassionately, we need to see the client's external and internal worlds clearly. We need to be able to notice, differentiate and put aside any responses we have as practitioner that arise from our own external and internal worlds. Imagine the demands of holding a conversation with a client whose partner has just left while your own relationship is in a sticky patch.

  The 'wounded healer.' There is another, rather poignant, aspect to this, namely that of 'the wounded healer.' What this refers to is the notion that in order to heal or help another, we need to do so from a 'place' or 'awareness' of our own woundedness. In other words, it is unlikely I can connect with your sensitivity or pain unless in some way I have been similarly wounded ...

  The trick is one of balance. As practitioner, I need to have 'been there' and – to be flippant! – 'got the T-shirt' and worked through and integrated the experience, so in turn I can reach out helpfully and dispassionately to the client, rather than do so from a position of personal pain. This usually equates to undertaking personal and interpersonal professional development.

  Personal and interpersonal professional development
  What this means is that as part of professional training, practitioners need to address personal and interpersonal issues that might impact on their client work. There are various ways of so doing. Students who choose to undertake training in employee & organization support are encouraged and supported throughout to make appropriate personal connections with any and all the material they study. There are various ways of doing this.

- **Sensitivity to process**
  This is 'the proof of the pudding' and refers to the ability to be aware of what's happening moment-by-moment with the client and making sense of it at the time.

Quite a few professional competences listed in the previous chapter address this, such as the need for practitioners to:

- Be clear on their own role(s) and remit(s) and manage multiple roles, role conflicts and multi-cornered client contracts.
- Form appropriate professional / helping relationships demonstrating the ability to be: sensitive to the values held by the client and self; the capacity to accept others with the absence of social prejudice, ethnocentrism and authoritarianism; the capacity to tolerate strong or uncomfortable feelings in relation to the client without being personally diminished.
- Contract appropriately with clients, colleagues, and managers — demonstrating secure personal boundaries.
- Use communication and helping skills as appropriate to the nature of the interaction.
- Intervene differentially.
- Conceptualize practice, (e.g. demonstrate the ability to understand and assess: the client's problems; anticipate future consequences of actions; make sense of immediate problems in terms of a wider conceptual scheme; remember information about the client; cognitive flexibility and skills in problem solving).
- Keep the client, the organization and themselves legally, ethically, physically and psychologically safe — demonstrating the ability to monitor and maintain their fitness to practice ensuring work is undertaken safely and seeking appropriate professional support as the need arises.
- Be aware of and describe their personal and interpersonal approach to employee & organization support work.
- Manage their continued personal and interpersonal professional development according to need; linking to relevant theory.

- Manage the ongoing emotional demands of client work and maintain psychological well-being — demonstrating the capacity to use support networks and supervision
- Function appropriately and effectively within the organization.
- Personal and moral qualities: the concept of skills captures only one component of competence. Practitioners are also required to demonstrate the following:
  - Empathy: the ability to communicate understanding of another person's experiences from that person's perspective.
  - Sincerity: a personal commitment to consistency between what is professed and what is done.
  - Integrity: commitment to being moral in dealings with others, personal straightforwardness, honesty and coherence.
  - Resilience: the capacity to work with the client's concerns without being personally diminished.
  - Respect: showing appropriate esteem to others and their understanding of themselves.
  - Humility: the ability to assess accurately and acknowledge one's own strengths and weaknesses.
  - Competence: the effective deployment of the skills and knowledge to do what is required.
  - Fairness: the consistent application of appropriate criteria to inform decisions and actions.
  - Wisdom: possession of sound judgment that informs practice.
  - Courage: the capacity to act in spite of known fears, risks and uncertainty.

CHAPTER SUMMARY

This is perhaps quite a personal chapter and one that needed to be included to 'stake the territory.' Supporting people at work isn't a job like others. It requires personal investment. In turn, that raises a whole host of practitioner issues.

Task No 14

Please set out how you feel about the core competence of reflective practice.

CHAPTER 15: *Developing Reflective Practice - The Professional Log*

Having identified the competences important to the job — in particular that of 'reflective practice' — we need ways and means of developing them. For 'helpful conversations,' that means using 'the professional log.'

The professional log
A professional log consists of three self-rating forms that you complete subsequently to a particular client conversation. Their aim is to help you think about the conversation, how it went, and how you felt you got on.

(1) Competences Identification Form
The first form is about the professional competences and how you felt you coped with them. Here is a blank form. A lot of the terms used on it should now sound vaguely familiar. A worked example of a completed form (1) follows. Full explanations of each competence and how to complete the forms are in the Appendix "Explanations to the Professional Log."

PROFESSIONAL LOG
(1) Competences Identification Form

Self/Peer/Tutor ……………….………………. **Date** ………………

	COMPETENCE AREAS	RATING 1 to 5 - to +	COMMENTS
0.0	**Social Worker Context**		
	Legal		
	Policy		
	Procedures		
	Systems Feedback		
1.0	**The Frame**		
	Type of Conversation		
	Modality (face-to-face, telephone, etc)		
	Setting		
	Contract (explicit / implicit)		

	COMPETENCE AREAS	RATING 1 to 5 - to +	COMMENTS
	Time		
	Timing		
	Ethical issues		
	System Interface Boundaries		
	Reports to 3rd party		
	Consultative Support		
	Referral Agencies		
2.0	**The Helping Relationship**		
	Role: Practitioner		
	Role: Client		
	Role-conflict issues		
	Multi-cornered Contract issues		
	Power Dynamics		
	Core Conditions Restrictions		
	Underpinning Values		
	Psychodynamic aspects		
3.0	**Session Content**		
	Remit		
	Agenda setting		
	Overlaps (Role, Relationship, Reality)		
	Focus (Task, Client, Organization)		
	Procedural Model		
4.0	**Skills Usage**		
	Following Skills		
	Leading Skills		
	Other?		

	COMPETENCE AREAS	RATING 1 to 5 - to +	COMMENTS
5.0	**Practitioner Competence**		
	Issues Arising		
6.0	**Practitioner Self-Monitoring**		
	Practitioner psychic state		
	Client psychic state		
	Rapport		
	Transference =Issues		
	Practitioner Emotional hooks		
	Practitioner Experiential hooks		
	Issues Arising		
7.0	**Summary Comments**		

(2) Skills Usage Form

The second form takes a more in-depth look at the skills and interventions you used. Again, a worked example follows and detailed explanations are in the Appendix "Explanations to the Professional Log."

PROFESSIONAL LOG
(2) Skills Usage Form

Name: ……………………………… **Week:** ……………………………… **Date:** ………………………………

Client		**Reason for Contact:**
Code ID		
Occupation		
Gender		**Brief Description of Interaction:**
Age		
Interaction		
Date		
Time		
Duration		
No		
Referral		**Quotes and Skills Identification**
Self		
Managerial		(1)
Personnel		
Medical		(2)
Other		
		(3)
1st Contact		
Date		(4)
Time		
Duration		(5)
Telephone		
Letter		(6)
In Person		

(3) Procedural Elements Grid

The third form considers the procedural elements you adopted.

PROFESSIONAL LOG

(3) Procedural Elements Grid

Name: ………………….……………… **Client ID:** ……………….. **Date:** ……………….

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Managing the Setting								
Pre-appointment contracting								
Contracting								
Mini-Contracting								
Working with the Reluctant Client								
Issue Acknowledgment/ Support								
Issue Identification								
Issue Clarification								
Risk Assessment								
Deferral								
Exploration of Implications								
Prioritization								
In-depth Exploration								
Exploration of Personal Meaning								
Responding								
Identification of Strengths/ Opportunities/ Solutions								
Identifying Patterns								
Identification of Blind Spots / Resistant Client								

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Identification of Short Term Coping Strategies								
Identify & Remedy Skills Deficit								
Goal Setting								
Action Plan: Client								
Action Plan: Practitioner / Call-back								
Life- and/or Executive Coaching								
Internal-Frame-of-Reference Reporting								
External-Frame-of-Reference Reporting								
Advocacy/ Representation								
Making Recommendations								
Practitioner Initiated Action								
Risk Assessment								
3(+)-way Meetings								
Referral								
Client Monitoring and Support								
Umbrella Monitoring/ Supervision								
Client Follow up								
System Feedback								
Other								

Comments:

Worked example of a completed professional log
Here is a worked example of a completed professional log for a piece of rather complex client work. I have deliberately constructed a more complicated case as that allowed me to complete most sections on all of the forms to show you how they work.

Note that Form (1) is about your competences as a practitioner, rather than the details of the case. These appear on Form (2).

> "Employee called on the advice of Human Resources department. Single parent with daughter (14) and son (12); Widowed three years ago. 14-year-old daughter had been off ill for one week. Subsequently to recovering physically, she had refused to go back to school. All attempts within the family to get her to explain or persuade her to return to school have been fruitless. The situation has now remained unresolved for a week. Employee has been off work for 2 weeks. Father clearly concerned and worried in his own right. Appears to be suggesting that daughter may wish to speak to someone outside the family. So far she has not opened up to anyone."

With that introduction, it should be possible to make sense of the following completed professional log.

PROFESSIONAL LOG
(1) Competences Identification Form

Name: ……………………………………….
Your Name ………………………………………. **Date** ………………………

	COMPETENCE AREAS	RATING 1 to 5 (-) to (+)	COMMENTS
0.0	**Social Worker Context**		
	Legal	2	Unsure about legal implications, etc; don't think I made any blunders.
	Policy	2	Aware I was pretty clueless.
	Procedures	2	Ditto.
	Systems Feedback	5	Pleased I raised all the relevant issues within the department subsequently. We need a protocol how to manage enquiries about adolescents; also, we need to think about suitable referral agencies.
1.0	**The Frame**		
	Type of Conversation	3	Uncomfortable: was I supposed to be giving advice or Counseling? In the end, just gathered information.
	Modality (face-to-face, telephone, etc)	5	No problem with telephone.
	Setting	3	Not a major issue: I was in the office, not sure if caller calling from home or work, whether they could speak privately or not. Failed to check this out.
	Contract (explicit / implicit)	3	Uncomfortable – who was my contract with and what was it?
	Time	5	Not a problem, although it was not under my control.
	Timing	4	May have been a problem, not sure. Presumably, parent chose to call at this time because they were sufficiently worried to take action and previous attempts to manage the problem had failed.
	Ethical issues	3	As explained so far. How much could I or should I say to the parent? I was also aware of my lack of specialist knowledge.

	COMPETENCE AREAS	RATING 1 to 5 (-) to (+)	COMMENTS
	System Interface Boundaries	4	Potentially, but I managed well. Aware of potential need to talk with young person later and anxious not to prejudice relationship.
	Reports to 3rd party	4	Potentially complex (e.g. if school became involved). I'm aware of feeling uneasy about 'messy' cases.
	Consultative Support	2	None of us here are experts on young people!
	Referral Agencies	2	Few and far between for young people. Not good. We are not set up for this.
2.0	**The Helping Relationship**		
	Role: Practitioner	3	Uncomfortable. Who was client?
	Role: Client	4	Less problematic
	Role-conflict issues	5	No issues
	Multi-cornered Contract issues	4	Potentially, but well avoided
	Power Dynamics	5	No problem
	Core Conditions Restrictions	5	Although situation was potentially 'messy,' this did not affect the core conditions in relation with parent.
	Underpinning Values	5	No problem
	Psychodynamic aspects	4	I suppose I felt the parent's desperation and their expectation on me to 'put things right' as nothing they had tried had helped so far.
3.0	**Session Content**		
	Remit	4	Uncomfortable. Stayed with info gathering
	Agenda setting	4	Parent had their agenda – I had mine, which was to not let this conversation get too deep or 'out of hand.'
	Overlaps (Role, Relationship, Reality)	5	No problem

	COMPETENCE AREAS	RATING 1 to 5 (-) to (+)	COMMENTS
	Focus (Task, Client, Organization)	5	No problem – entirely client-centered.
	Procedural Model	5	Knew what to do in tricky situation
4.0	**Skills Usage**		
	Facilitative Interventions	5	No problems with skills as such
	Authoritative Interventions	5	Ditto
	Other?	4	I could have made some systemic interventions, asking about the family as a whole; did not feel very confident in doing this as I was not clear who the client was: the parent, the child or the family. Need to raise this in supervision.
5.0	**Practitioner Competence**		
	Issues Arising	4	Managed tricky situation well – if perhaps overcautiously. Could have ascertained more relevant background info; concerned to clarify policy first.
6.0	**Practitioner Self-Monitoring**		
	Practitioner psychic state	4	Fine to begin with and then found myself becoming anxious.
	Client psychic state	4	Anxious, and putting me under some pressure to resolve. They would have liked to have gone into greater detail.
	Rapport	4	OK, with these proviso's
	Transference Issues	4	Some, I think, as in 'please fix it' – almost as if I had become the parent's parent.
	Practitioner Emotional hooks	4	The parent's anxiety hooked into my uncertainty of how to proceed. Working with children and young people in any event is complex because of the other parties involved and I could feel my anxiety creeping up.

	COMPETENCE AREAS	RATING 1 to 5 (-) to (+)	COMMENTS
	Practitioner Experiential hooks	5	No problem there. This has not happened to me or anyone else I know. If anything, I could sympathize with the young person's point of view.
	Issues Arising	4	Aware of own unease throughout & managed well.

7.0 Summary Comments

Parent telephoning about 14-year old's school refusal subsequently to being ill. This has affected parent in that they have been absent from work. Human Resources staff have been involved and advised to contact the local social services agency. Child saying that what is being taught at school is pointless and irrelevant. No longer wants to attend. Child has seen family doctor and nothing wrong. Parent worried as all attempts to manage have failed. Uncomfortable to what extent I should be discussing child's issues with parent. Uncertain of our policies and procedures regarding employee's children and what resources we have to address such issues. Concerned not to work beyond own level of competence. Managed own unease by taking only minimal info details from parent — thus not prejudicing future work — and advising I needed to make enquiries and would call back. Discussed with Line Manager: parent and child to visit the office. Most likely referrals to be made.

- We need a protocol on how to deal with calls involving minors.
- We also need to identify resources for consultancy on children and young people. None of us in the office is qualified in this area.

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Explanatory Remarks

- Please note that it is important to rate each competence as itself only. In this example, it is clear from the figures that the main problems were around unfamiliarity with procedures and resources. All other ratings are OK+ or better.
- Also note that by rating each competence as itself, competence areas (4), (5) and (6) show that this is a skilled, safe and competent practitioner, who managed an unexpected lack of competences well and safely.
- Nonetheless, the form has identified a major competence learning need.

PROFESSIONAL LOG

(2) Skills Usage Form

Worked Example

Name: [Your Name]
Client ID: [201] **Date:**

Client		**Reason for Contact:** Employee's concern re daughter
Code ID	201	
Occupation	Clerk	
Gender	Male	**Brief Description of Interaction:** Employee called on the advice of Human Resources. Single parent with daughter (14) and son (12). Widowed three years ago. 14-year-old daughter had been off ill for one week. Subsequently to recovering physically, she had refused to go back to school. All attempts within the family to get her to explain or persuade her to return to school have been fruitless. The situation has now remained unresolved for a week. Employee has been off work for 2 weeks. Father clearly concerned and worried in his own right. Appears to be suggesting that daughter may wish to speak to someone outside the family. So far, she has not opened up to anyone.
Age	43	
Interaction		
Date	10/2/2	
Time	11:00	
Duration	15 Min	
No	1st	
Referral		**Quotes and Skills Identification**
Self	√	
Managerial		(1) "Everything was fine,and your daughter enjoyed school until she became ill two weeks ago." (Reflecting Content)
Personnel		
Medical		(2) "Your wife's death hit you and the children hard; gradually you all recovered. It's left you very close." (1/Reflecting content. 2/Reflecting meaning)
Other		
		(3) "It's hard to make sense of what's going on and I expect it's also a worry for you. You're the only parent and you're having to make decisions in a situation you haven't come across before. So this is also about: 'How should I be managing this?' " (1/Reflection of Feeling, 2/Advanced Reflection of Feeling/Meaning)
1st Contact		
Date	10/2	(4) "We're here to support you to help you get back to work and that includes your family as needed." (Information Giving / Social Reassurance.)
Time	11:00	
Duration	15 Min	(5) "Yes, I think I've understood: there's the worry with your daughter and you feel she would like to talk to someone outside the immediate family; there's also your side of it and needing to get back to work." (Summarizing)
Telephone	√	
Letter		(6) "Let me find out what we can do, what the options are and I'll get back to you, probably later today. Will it be all right to leave a message on your answering machine?" (1/Information giving. 2/Contracting.)
In Person		

PROFESSIONAL LOG

(3) Procedural Elements Grid

Worked Example

Name: [Your Name]

Client ID: [201] **Date:**

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Managing the Setting								
Pre-appointment contracting								
Contracting								
Mini-Contracting								
Working with the Reluctant Client								
Issue Acknowledgment/ Support				Ě	Ě			
Issue Identification				Ě	Ě			
Issue Clarification				Ě	Ě			
Risk Assessment				Ě				
Deferral				Ě	Ě			
Exploration of Implications				Ě				
Prioritization								
In-depth Exploration								
Exploration of Personal Meaning				Ě				
Responding				Ě	Ě			
Identification of Strengths/ Opportunities/ Solutions								
Identifying Patterns								
Identification of Blind Spots / Resistant Client								

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Identification of Short Term Coping Strategies								
Identify & Remedy Skills Deficit								
Goal Setting								
Action Plan: Client								
Action Plan: Practitioner / Call-back				Ě	Ě			
Life- and/or Executive Coaching								
Internal-Frame-of-Reference Reporting				**?**	**?**			
External-Frame-of-Reference Reporting				**?**	**?**			
Advocacy/ Representation								
Making Recommendations				Ě				
Practitioner Initiated Action								
3(+)-way Meetings				likely				
Referral				likely	maybe			
Client Monitoring and Support				Ě				
Umbrella Monitoring/ Supervision				Ě				
Client Follow up				Ě				
System Feedback								
Other								Ě

Comments

We're not terribly well equipped to deal with families and need to be. Departmental feedback to be given.

CHAPTER SUMMARY

In this chapter, we familiarized ourselves with the professional log as a reflective practice learning tool. The three forms of the log accommodate the various theoretical and practical teaching points of holding helpful conversations and thus provide a framework for reflection, self-assessment, critique and practitioner development over time.

Task No 15

Please explain your understanding of a professional log.
Please note any questions you have.

APPENDIX
Explanations to the Professional Log

Throughout this booklet, we've worked with illustrative examples of the Professional Log. You might like to understand each of the three Forms and their individual entries in greater detail.

Explanations for each follow below. Remember also, that all the procedural elements are listed and defined in chapter 9.

PROFESSIONAL LOG
(1) Competences Identification Form
EXPLANATIONS

Name:
Client ID: **Date**

	COMPETENCE AREAS	RATING 1 to 5	COMMENTS
0.0	**Social Worker Context**		
	Legal		How did I manage the legal issues? Did I know them?
	Policy		Ditto for policy
	Procedures		Ditto for procedures
	Systems Feedback		Do I need to give systems feed back to the organization?
1.0	**The Frame**		
	Type of Conversation		Was I clear about the kind of conversation I was having or were there any problems with the kind of conversation?
	Modality (face-to-face, telephone, etc)		How well did I manage this? Were there problems (e.g. because I was on the telephone and could not see the client or difficulties in the face-to-face interaction)?
	Setting		Did the setting affect the interaction markedly? Did I have problems managing the setting?
	Contract (explicit / implicit)		Was contracting explicit/implicit (*indicate*) and were there any problems or uncertainties regarding the nature of the contract that I should have managed better or indeed managed very well.
	Time		Was the time of the conversation appropriate? Too early or too late in the day?
	Timing		Was it appropriate to have the conversation at this point in time? Should it have occurred earlier or been deferred?
	System Interface Boundaries		Was there a problem with overlapping systems (e.g. the client or myself or third parties being part of more than one system and therefore the management of those boundaries and the information that passes between them being critical) and how well did I cope?

	COMPETENCE AREAS	RATING 1 to 5	COMMENTS
	Reports to 3rd party		Am I required to make any reports to 3rd parties and, if so, are there any issues arising from that?
	Consultative Support		Do I have consultative support in place to manage any issues arising for me from this conversation?
	Referral Agencies		Did I know enough about relevant referral agencies, should the need have arisen?
2.0	**The Helping Relationship**		
	Role: Practitioner		Was I clear in my role and function within my role and was this clear to the client?
	Role: Client		Was the client clear in their role as client and how well did I manage to resolve any issues arising
	Role-conflict issues		Were there role-conflict issues – either for myself as practitioner or the client – and how were these managed.
	Multi-cornered Contract issues		Were there multi-cornered contract issues and, if so, how did I manage them? Did they impact on the kind of work I could do?
	Power Dynamics		Was there a power differential between the client and myself and how did that impact on the work?
	Core Conditions Restrictions		Was I aware of limitations or restrictions?
	Underpinning Values		Was there a conflict about underpinning values (e.g. did I have to struggle to do right by the client and right by my employer) and how did I manage that.
	Psychodynamic aspects		Were there any psychodynamic aspects about the relationship with the client (e.g. did I have a sense I should 'rescue' the client or was seen as 'all powerful,' endowed with a magic wand to put things right, etc).
3.0	***Session Content***		
	Remit		Was my rightful remit clear to me and was I able to stay within it or were there problems?
	Agenda setting		

	COMPETENCE AREAS	RATING 1 to 5	COMMENTS
	Overlaps (Role, Relationship, Reality)		To what extent were there (potential) overlaps between the work in our session and the work outside where we may know one another in different roles, in different relationships and share a mutual reality (e.g. that of being civil servants)? Did these factors impinge on the work and how?
	Focus (Task, Client, Organization)		Were there any issues of needing to focus on either the task in hand, the client or the organization to the detriment of the other and how did I manage that?
	Procedural Model		When working with the client, was I clear in my own mind what procedural model was appropriate and was I able to follow it?
4.0	**Skills Usage**		
	Following Skills		How did I feel about my use of following skills: too many? Too few? Did well, not sure how to do it or when appropriate?
	Leading Skills		How did I feel about my use of leading skills: too many? Too few? Did well? Not sure how to do it or when appropriate?
	Other?		Did I use (or should I have used) other skills, such as skills for couples, families, groups, mediation etc.?
5.0	**Practitioner Competence**		
	Issues Arising		Has this session identified any issues of lacks in competence that I need to address?
6.0	**Practitioner Self-Monitoring**		
	Practitioner psychic state		How was I feeling at the outset and then ongoing? What, if anything, does this tell me?
	Client psychic state		How did the client seem to be feeling?
	Rapport		How did we get on?
	Transference Issues		Did I feel the client treated me as though I were someone from there past and vice versa? Did I feel unusually strong feelings towards the client arising in me?

	COMPETENCE AREAS	RATING 1 to 5	COMMENTS
	Practitioner Emotional hooks		Did I find myself getting emotionally hooked into the story or the client and losing my practitioner perspective?
	Practitioner Experiential hooks		Was the client's tale uncomfortably close to the bone so that it was difficult to maintain my practitioner perspective?
	Issues Arising		During the session, was I managing to monitor myself (i.e. how I was feeling and how I was coping with the various competences)?. Was I able to keep myself and the client 'safe'?

7.0 Summary Comments

Are there any summary conclusions to be drawn from the above or any further actions I need to take or new professional issues I need to address?

Professional Log (1) - Competences Identification Form – A User's Guide

What Is It

A *reflective* and *evaluative* form indicating *how well* practice went. It does not, primarily, *log* or *record* what was done or *what* the issues were or *how* they were approached. Rather, it looks at the *process* and *how* it went. It is a 'living document' in so far as the competences examined increase over time and as more skills are acquired, so future versions of the form will include additional competences. The form can be completed from several perspectives:

- Self: the form is completed by the practitioner and the perspective is subjective.
- External observer: the form is completed by a peer, tutor or even a colleague or manager at work. The perspective is more objective.

What does It Do

- Gives general, ongoing and training feedback on *'how did this go?'*
- For difficult practitioner/client interactions, can be used to quickly identify specific problem areas and facilitate thinking through or talking through, whether on one's own or with another. In this respect, it acts as professional, emotional first aid.
- Provides a profile of professional strengths and weaknesses and development over time.

When to Use It

- Can be completed for any interaction.

How to Use It

- Rate how well you managed each competence on a scale of 1 (=many problems) to 5 (=no problems at all).
- Where a competence was not relevant you can enter 'N/A.'
- The *Comments* column enables you to give further details. For example, this might be '5' or '1' for "Legal." It is not necessary to describe *what* you did – only to explain the rationale behind your rating, so that at a later point, when asked about this, you can recall it and also feedback can be given.

When Not to Use It

- There are no reasons not to use it.

And Not to Confuse It…

- With Forms that record practice, e.g. the *Procedural Elements Grid* or the *Skills Usage Form*.

Summary

The *Competences Identification Form* is a reflective and evaluative form which indicates '*how it went*' rather than recording what you said or what approach you took.

PROFESSIONAL LOG
(2) Skills Usage Form

Name:
Client ID: **Date:**

Client		**Reason for Contact:** What has prompted this particular contact?
Code ID		
Occupation		
Gender		**Brief Description of Interaction:** Indication of the client's issue(s) and how they were approached.
Age		
Interaction		
Date		
Time		
Duration		
No		
Referral		**Quotes and Skills Identification** Examples of what you the practitioner said verbatim as best you can recall it and identified as to the kind of skill.
Self		
Managerial		(1)
Personnel		
Medical		(2)
Other		
		(3)
1st Contact		
Date		(4)
Time		
Duration		(5)
Telephone		
Letter		(6)
In Person		

Professional Log (2) - Skills Usage Form – A User's Guide

A form that logs and records, and thus gives objective 'snapshots' of what you did as practitioner. This form does not in any way evaluate. However, by accurate logging and recording, it provides the basis for future evaluation.

- It logs factual details of client work, thus enabling comparison over time and with other practitioners.
- It records verbatim skill usage in the context of a particular client interaction.

What does it do

- Allows reflection on skills practice, by recording what you do.
- Begins to build a grounded picture of your day-to-day practice – a complete picture would of course require the completion of all professional log forms for all interactions.

When to Use It

- Can be completed for any interaction.

When Not to Use It

- There are no reasons not to use it.

And Not to Confuse It…

- With the *Competences Identification Form,* which asks you to rate how *well* you felt you managed as opposed simply to providing 'snapshots' of *what* you did.
- With the *Differential Procedural Models Grid,* which gives an overview of *how* you approached client issues.

Summary

Think of this form as though it were completed by an unbiased reporter who accompanied you and took snapshots of your work.

PROFESSIONAL LOG
(3) Procedural Elements Grid

Name:
Client ID: **Date:**

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Managing the Setting								
Pre-appointment contracting								
Contracting								
Mini-Contracting								
Working with the Reluctant Client								
Issue Acknowledgment/ Support								
Issue Identification								
Issue Clarification								
Risk Assessment								
Deferral								
Exploration of Implications								
Prioritization								
In-depth Exploration								
Exploration of Personal Meaning								
Responding								
Identification of Strengths/ Opportunities/ Solutions								
Identifying Patterns								
Identification of Blind Spots / Resistant Client								
Identification of Short Term Coping Strategies								
Identify & Remedy Skills Deficit								

	Work Pressures Difficulties	Personal Issues	Partner/ Marital Issues	Family Issues	Emotional Issues	Health and Medical	Financial, Debt, Legal	Other
Goal Setting								
Action Plan: Client								
Action Plan: Practitioner / Call-back								
Life- and/or Executive Coaching								
Internal-Frame-of-Reference Reporting								
External-Frame-of-Reference Reporting								
Advocacy/ Representation								
Making Recommendations								
Practitioner Initiated Action								
3(+)-way Meetings								
Referral								
Client Monitoring and Support								
Umbrella Monitoring/ Supervision								
Client Follow up								
System Feedback								
Other								

Professional Log (3) - Procedural Elements Grid – A User's Guide

What is it

A grid showing typical types of issues encountered in social work and a range of possible responses or 'procedural elements' to each, that is: the major steps taken as part of the interaction. One could also refer to these as 'macro (=big) skills.' Such 'procedural elements' or 'macro-skills' in turn will contain many individual 'micro (=small) skills' interventions. For example, *Acknowledge and Support* is likely to include Attending, Active Listening, Minimal Prompts, Reflections and so forth. The grid can be extended to include additional issues and responses: there is a spare column, 'Other,' for this.

What does it do

- Maps your current practice.
- Helps you to reflect on how you approach your practice.

When to Use It

- Can be completed for any interaction.

When Not to Use It

- There are no reasons not to use it.

And Not to Confuse It…

- With a detailed analysis of 'micro skills.' Skills Usage is analyzed on the *Competences Identification Form* and the *Skills Usage Form.*

Summary

The *Procedural Elements Grid* gives an overview of the kinds of issues dealt with and *how* they were approached.