



TEACHING NOTES FOR

# GRAPPLING WITH FAITH

DECISION CASES FOR  
CHRISTIANS IN SOCIAL WORK

TERRY A. WOLFER AND MACKENZI HUYSER

DO NOT DISTRIBUTE TO STUDENTS

DO NOT DISTRIBUTE THESE TEACHING NOTES (TNs) TO STUDENTS, either in whole or in part. The TNs are reserved for instructors only to preserve the full challenge of understanding and resolving the case dilemmas, for both current students and future students. Providing the TNs to students will undermine their need to grapple with the open-ended dilemmas in the cases and defeat the educational purpose of decision cases. Distributing the TNs to students is like distributing the test bank for a textbook.

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## Read Me First

Terry A. Wolfer and Mackenzi Huysen

The decision cases in *Grappling with Faith* differ significantly from conventional social work cases used to illustrate social work theory and practice. Because these are decision cases, they are open-ended and unresolved. As a result, they pose significant, intentional challenges for students and staff in the learning process. They may also pose some challenges for instructors. This collection of teaching notes is intended to address these challenges and to facilitate effective use of the cases with students in college and university classrooms and with practitioners in continuing education.

### Teaching Notes

The case authors have written extensive teaching notes (TNs) for each decision case. These TNs have several components to help you make effective and efficient use of the cases.

First, *to help you choose particular cases for your course*, the TNs include a brief case synopsis, a BSW- and / or MSW-level designation, and possible learning outcomes. In general, you should select cases involving practitioners at the professional level your students expect to enter next. This will increase their interest and motivation to grapple with the cases. Next, you can select cases with learning outcomes that fit your course. With this basic information, you can quickly determine which cases may be appropriate for your students and relevant for specific topics.

Second, *to help you lead a case discussion*, the notes include possible discussion questions and responses, additional teaching suggestions, and background readings. You will find this further information very useful for preparing to lead the case discussions. Instructors, like students, often tend to focus on certain aspects of cases, and to overlook others. The discussion questions and responses are intended to call attention to multiple aspects of the cases, thus broadening and deepening your own and your students' understanding of the issues in each case. We refer to these as responses rather than answers because they are often partial, in both the sense of incomplete and of reflecting a particular position.

Following a common pattern in case method teaching, the TNs organize the possible discussion questions into four categories:

- **Facts.** These questions address factual information that, although explicit in the case, may be unfamiliar or confusing for students. It's often helpful to clarify this information at the outset of the case discussion.
- **Analysis.** These questions identify and illuminate the basic dimensions of the dilemma in the case. By elaborating the controversial issues in the case, these questions encourage students to think critically and systemically. By thinking critically, we mean identifying and assessing goals, purposes, assumptions, and evidence. By thinking systemically, we mean considering relationships within and across system levels. The analysis questions typically constitute the majority of the overall case discussion and help students work toward formulating or defining the case problem, a significant aspect of effective case discussions.
- **Action.** These questions identify possible courses of action and develop consensus around a preferred response. Once the class has formulated the

problem, practice questions encourage students to consider the costs and benefits, intended and unintended consequences, and ethical implications of various courses of action. Furthermore, these questions help the students develop and choose a specific course of action for responding to the case dilemma. These questions connect the case discussion to the realities of professional practice.

- Reflection. Finally, reflective questions encourage students to explore their personal reactions to aspects of a case or their personal characteristics that may affect their professional “use of self.” These questions may be used to conclude the in-class discussion, either oral or written, or assigned as out-of-class homework.

The TNs conclude with teaching suggestions and background readings. The teaching suggestions include a variety of case-specific ideas for supplementing the classroom case discussion such as reading assignments, on-line research assignments, role plays, and breakout activities for small groups. These activities may provide a diversion from intensive, verbal case discussions and may help concretize or personalize information in the cases. The readings include books, journal articles, and web pages. They may be useful as background readings for instructors, students, or both. They can also be used as assigned readings following case discussions.

### **Case Matrix**

On the following pages, a case matrix summarizes some basic information about each of the cases in *Grappling with Faith*. This matrix may also help you to select cases for your courses.

	1. Sister's Keeper	2. The Grace House Ministry (A)	2. The Grace House Ministry (B)	3. The Letter	4. Gone Huntin'	5. Not My Church	6. In Good Faith	7. Unanswered Prayers
<b>Educational Level</b>								
BSW	X			X		X	X	X
MSW	X	X	X	X	X		X	
<b>Case Setting</b>								
Congregation		X	X			X		
Private, non-profit organization				X	X		X	X
Public organization	X							
<b>Client System/Target of Change</b>								
Individual	X			X	X			X
Family	X			X	X			X
Group								
Organization						X	X	
<b>Populations at Risk</b>								
Children	X	X	X	X				
Youth	X							
Women		X	X	X				X
Racial/ethnic minorities				X				
Learning disabilities								
Poverty		X	X					
Immigrants/refugees				X			X	
<b>Fields of Practice</b>								
Congregational Social Work		X	X					
Health/Mental Health					X			
Military								
Domestic Abuse	X			X				X
School Social Work								
Economic Assistance		X	X	X				
International Social Work							X	
Substance Abuse	X							
Other (housing, family services, child welfare)								
<b>Social Work Generalist Role</b>								
Micro (Enabler, Broker/Advocate, Teacher)	X		X	X	X	X		X
Mezzo (Facilitator, Convener/Mediator, Trainer)		X	X			X		
Macro (Planner, Activist, Outreach)			X			X	X	

	8. Birthfather's Right	9. Mental Health and Spirituality . . .	10. I'm Not the Church Social Worker	11. The Threat	12. A Shoplifter	13. Am I Missing Something	14. The Eligibility Error	15. Aiding or Abetting Abortion
<b>Educational Level</b>								
BSW	X	X	X	X	X	X	X	
MSW	X	X	X	X	X	X	X	X
<b>Case Setting</b>								
Congregation			X					
Private, non-profit organization	X			X			X	X
Public organization		X			X	X		
<b>Client System/Target of Change</b>								
Individual	X	X	X	X	X	X		X
Family	X		X				X	
Group		X						
Organization							X	
<b>Populations at Risk</b>								
Children	X						X	
Youth					X			
Women		X	X		X			
Racial/ethnic minorities		X					X	
Learning disabilities						X		
Poverty			X	X			X	
Immigrants/refugees								
<b>Fields of Practice</b>								
Congregational Social Work			X					
Health/Mental Health			X	X	X			X
Military					X			
Domestic Abuse								
School Social Work						X		
Economic Assistance			X					
International Social Work								
Substance Abuse			X					
Other (housing, family services, child welfare)	X			X			X	
<b>Social Work Generalist Role</b>								
Micro (Enabler, Broker/Advocate, Teacher)	X	X	X	X	X	X	X	X
Mezzo (Facilitator, Convener/Mediator, Trainer)		X					X	
Macro (Planner, Activist, Outreach)						X	X	

	1. Sister's Keeper	2. The Grace House Ministry (A)	2. The Grace House Ministry (B)	3. The Letter	4. Gone Huntin'	5. Not My Church	6. In Good Faith	7. Unanswered Prayers
<b>Faith-Related Dilemmas</b>								
Unique Christian Perspective	X	X	X		X			
Discerning God's Will								X
Justice vs. Mercy								
Individual vs. Group/Organization			X	X		X	X	X
Limit of Forgiveness					X			X
Honesty/Integrity				X		X	X	
Family Role and Definition								X
<b>Ethical Issues</b>								
Professional Boundaries	X				X			
Self-Determination	X		X	X				X
Client Decision Capacity	X							
Conflict of Interests				X			X	X
Commitment to Clients		X		X		X		
Defining the Client							X	
Integrity of the Profession				X		X	X	
Competence								
Termination						X		



- 8. Birthfather's Right
- 9. Mental Health and Spirituality . . .
- 10. I'm Not the Church Social Worker
- 11. The Threat
- 12. A Shoplifter
- 13. Am I Missing Something
- 14. The Eligibility Error
- 15. Aiding or Abetting Abortion

Faith-Related Dilemmas								
Unique Christian Perspective		X				X		X
Discerning God's Will		X						
Justice vs. Mercy					X			
Individual vs. Group/Organization		X	X	X		X	X	X
Limit of Forgiveness				X				
Honesty/Integrity						X	X	
Family Role and Definition	X		X					
Ethical Dilemmas								
Professional Boundaries	X	X	X	X				X
Self-Determination				X			X	X
Client Decision Capacity	X			X	X			
Conflict of Interests			X	X			X	
Commitment to Clients			X	X		X		X
Defining the Client	X							
Integrity of the Profession	X					X	X	X
Competence								X
Termination								

# Sister's Keeper?: Teaching Notes

*Christine Kessen*

## Case Synopsis

Trudy Atherton and Rickie Norris, social workers in the Cuyahoga County (Ohio) juvenile justice system, struggled to help Debbie Richards, a drug-abusing teenager concerned with parental neglect of her five-year-old sister. Responding to a crisis without clear agency guidelines, they considered the imperfect realities of the child welfare system while weighing the ethical, legal, and practice issues involved with mandated reporting. Issues of faith and conscience emerged as Rickie identifies with the teen's professed religion. In a dual role as both social worker and fellow Christian, Rickie felt responsible to insure a supportive Christian environment for Debbie and her sister.

## Intended Case Use

This case is appropriate for either undergraduate or graduate levels. Both workers address issues of mandated reporting and case collaboration with another agency and within the same agency. In addition, the MSW worker considers treatment issues which may result from reporting and struggles with the impact of her faith on practice. This case can be used to provide specialized instruction in child welfare, juvenile justice, ethics, and spirituality, as well as general instruction in direct practice courses.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Understand that mandated reporting of child neglect involves ethical and treatment issues for the social worker.
2. Recognize that the social worker's personal faith can have either a negative or positive impact on treatment decision-making.
3. Recognize that failure to set and maintain professional boundaries can result in faulty treatment decisions.
4. Understand that crisis decision-making involves collaboration with other professionals involved in the case even when workers in an outside agency are not trusted.

5. Understand that ethical social work practice includes reviewing and applying the NASW Code of Ethics when confronted with an ethical dilemma.
6. Recognize that drug abuse impairs an adolescent's ability to function and therefore limits the right to self-determination.

### Discussion Questions and Answers

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize. For particular purposes, they may need to develop their own additional discussion questions. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts—to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis—to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action—to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection—to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### *Facts*

1. What is the relationship between the Division of Treatment Services, Department of Justice Affairs, and the Department of Children and Family Services?

Both were public agencies under the auspices of Cuyahoga County. As such, both agencies were answerable to the same county commissioners. The Division of Treatment Services (DTS) in the Department of Justice Affairs provided a full range of clinical and case management services to at-risk youth. DTS provided individualized risk assessments for youth being discharged from the Youth Development Center and determined appropriate services. Possible services included family therapy, group and individual counseling, as well as ongoing case management and monitoring. DCFS handled all child maltreatment referrals from public and private agencies as well as the general public in the same manner and according to the same criteria. After DCFS workers evaluated referral information and determined that an investigation was warranted, they conducted a risk assessment to determine appropriate services or placement. [Case flow chart from DCFS website can be inserted here.]

2. What was Trudy Atherton's job? What was her role in this case?

Trudy was a case manager within the Division of Treatment Services, Department of Justice Affairs. Her tasks were to arrange and monitor aftercare services for adjudicated adolescents after their release from the Cuyahoga County Youth Development Center, a juvenile detention facility. Services included family therapy, group and individual counseling, ongoing case management, behavioral management and monitoring, education and

employment support. Her role in this case was to arrange and monitor aftercare services for Debbie after her release from the detention facility.

3. What was Rickie Norris' job? What was her role in this case?

Rickie was an assessment specialist in the Division of Treatment Services, Department of Justice Affairs. The Division of Treatment Services was approved by both the Ohio Department of Alcohol and Drug Addiction Services and the Alcohol and Drug Addiction Services Board of Cuyahoga County to provide non-intensive outpatient alcohol and drug treatment services. Rickie's tasks were to provide individual and group substance abuse education and treatment to juvenile offenders being returned to the community after detention. Her role in this case was to provide group substance abuse education, crisis counseling, and individual substance abuse treatment to Debbie on referral from Aftercare Services. When promoted to Program Coordinator, Rickie assumed administrative responsibilities while continuing to provide services to a small caseload including Debbie.

4. What was the relationship between Trudy and Rickie?

Trudy and Rickie were colleagues who worked in adjacent units in the same agency. Trudy referred cases to Rickie for treatment and they consulted with each other on their clients' progress. They respected each other and were friendly, frequently having lunch together.

5. What was the relationship between Trudy's department, which provided case management services, and Rickie's department, which provided treatment services?

The departments provided complimentary services to the same clients in the same agency. Trudy's department authorized services and referred appropriate cases to Rickie's department for substance abuse education and treatment.

6. What other systems were involved?

The public education, religion, and law enforcement systems were involved in this case. Both Debbie and her sister, Cheryl, attended public school. Debbie and her grandmother attended a Baptist Church in her grandmother's community. Rickie attended a Christian Church. The drug dealing in Sandra's neighborhood and home would be a focus of attention for law enforcement.

7. What are mandated reporting laws? What do they require?

Mandated reporting laws are state laws that require professionals to report suspicions of child abuse and neglect to local child welfare authorities. In Ohio where this case takes place, the Ohio Revised Code 2151.421 identifies a number of professionals (attorneys, audiologists, child care workers, children's services personnel, clergy, coroners, daycare personnel, dentists, law enforcement personnel, licensed professional counselors, nurses and other health care professionals, physicians including interns and residents, psychologists, speech pathologists, school teachers, and other school personnel) as well as social workers as mandated reporters. The law protects reporters from any civil or criminal liability for reporting in good faith. It also provides possible sanctions against professionals who fail to report, including conviction of a fourth degree

misdemeanor, professional sanctions, and liability for any harm that occurs to a child as a result of the failure to report.

Children's Services in each Ohio County provides a 24 hour hotline for reporting suspected child abuse and neglect. They request as much information as possible including the name, age, and address of the child victim, the name of the parent or caretaker of the child, the name and address of the person suspected of abusing or neglecting the child, and the reason for the suspicion regarding the abuse or neglect.

8. What issues was Debbie facing as an adolescent?

Like any adolescent, Debbie was forming her identity (Erickson, 1963, 1968) as a young adult. She was completing high school and needing to prepare for a future occupation. As a young woman, she faced new sexual intimacy issues as well as the need to resolve intimacy issues with her mother (Gilligan, 1979, 1993). In addition to the stressful environment caused by parental neglect, Debbie faced the additional stress and turmoil (Hall, as cited in de Anda, 1995) that usually characterizes adolescence in our society. As a young adult, Debbie was increasingly evaluating her own actions and regulating her own behavior rather than relying on parent figures (Bandura, as cited in de Anda, 1995). Her values and decisions reflected more her own viewpoints (Gardner & Thompson, as cited in de Anda, 1995). As an adolescent, Debbie's use of illicit drugs placed her at high risk for a number of negative consequences including early death through motor vehicle accidents or suicide (Singer & Hussey, 1995). However, we need to be cautious in our understanding of Debbie's experience of adolescence. As noted by de Anda (1995), we have little research on the development of minority and poor adolescents like Debbie.

9. What was the evidence for Debbie's religion/spirituality/faith?

Debbie attended a Baptist church with her grandmother and identified herself to Rickie as a Christian.

*Analysis*

10. Who was the client? (Debbie, sister, mother, family unit, court, society, agency)

In this treatment setting, Debbie was the primary client as the individual coming for treatment. Social workers using an ecological or psychosocial perspective would also view members of Debbie's family (mother, sister, grandmother) as the client. A social worker with a family systems approach might involve the whole family in treatment. Due to the agency setting as part of the juvenile justice system, the social worker may also view the court and wider society as the client.

11. What NASW Code of Ethics standards apply to this case?

**1.01 Commitment to Clients** - "Social workers' primary responsibility is to promote the well-being of clients. In general, clients' interests are primary. However, social workers' responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients, and clients should so be advised. (Examples include when a social

worker is required by law to report that a client has abused a child or has threatened to harm self or others.”

**1.02 Self-Determination** - “Social workers respect and promote the right of clients to self-determination and assist clients in their efforts to identify and clarify their goals. Social workers may limit clients’ right to self-determination when, in the social workers’ professional judgment, clients’ actions or potential actions pose a serious, foreseeable, and imminent risk to themselves or others.”

**1.07 Privacy and Confidentiality** - “(a) Social workers should respect clients’ right to privacy. Social workers should not solicit private information from clients unless it is essential to providing services or conducting social work evaluation or research. Once private information is shared, standards of confidentiality apply.

(b) Social workers may disclose confidential information when appropriate with valid consent from a client or a person legally authorized to consent on behalf of a client.

(c) Social workers should protect the confidentiality of all information obtained in the course of professional service, except for compelling professional reasons. The general exception that social workers will keep information confidential does not apply when disclosure is necessary to prevent serious, foreseeable, and imminent harm to a client or other identifiable person. In all instances, social workers should disclose the least amount of confidential information necessary to achieve the desired purpose; only information that is directly relevant to the purpose for which the disclosure is made should be revealed.

(d) Social workers should inform clients, to the extent possible, about the disclosure of confidential information and the potential consequences, when feasible, before the disclosure is made. This applies whether social workers disclose confidential information on the basis of a legal requirement or client consent.

(e) Social workers should discuss with clients and other interested parties the nature of confidentiality and limitations of clients’ right to confidentiality. Social workers should review with clients circumstances where confidential information may be requested and when disclosure of confidential information may be legally required. This discussion should occur as soon as possible in the social worker-client relationship and as needed throughout the course of the relationship.”

**2.05 Consultation** - “Social workers should seek the advice and counsel of colleagues whenever such consultation is in the best interests of clients.”

12. Did the Department of Children and Family Services fail Debbie and her family? Why or why not?

Yes. DCFS did not adequately monitor the home situation after Debbie was returned to Sandra’s care. If they had, they could have addressed Sandra’s continued parental neglect with offers of supportive services, treatment, etc. If improvements were not made, DCFS could have reported the neglect to the court and another placement sought for Cheryl and Debbie.

No. The court returned Debbie to Sandra’s care when Sandra was functioning adequately as a parent. Follow up visits by DCFS workers indicated no signs of

neglect. Without additional complaints or requests for services, DCFS workers had no reason to investigate further.

13. What were Rickie's responsibilities to her client, co-workers, agency, profession, society, and God?

While Rickie's primary responsibility was to the welfare of her client, Rickie also had a responsibility to consult with her co-worker on this shared case, to follow the policies and procedures of her agency, to act according to the Code of Ethics of the social work profession, and to protect the safety of members of society as indicated by law. As a practicing Christian, Rickie also felt the ultimate responsibility to act according to God's will or plan.

14. Was this a case of mandated reporting regardless of whether the worker believed that the Department of Child and Family Services would do anything?

Yes. The law on mandated reporting is clear that suspicions regarding neglect of a child need to be reported to appropriate authorities. There are no exceptions based on expected outcome of the report.

15. How might reporting affect the worker/client relationship, either positively or negatively?

Reporting could have a negative effect on Rickie's relationship with Debbie, particularly if Rickie had not explained the limits of confidentiality during their initial treatment sessions and, again, at the time of reporting. Debbie may have believed that Rickie violated her trust. In addition, Debbie could have held Rickie responsible if the outcome of the DCFS investigation was negative for herself or Cheryl.

Conversely, reporting could also have produced a positive effect. Debbie could have respected Rickie as an adult in control and value her taking charge of the situation. She may also have confided in Rickie because she recognized that the situation was beyond her control and that she needed assistance. Debbie may have been relieved that the burden was shared with Rickie, a responsible adult.

16. If Rickie had the client's permission to explore issues of faith, would this crisis situation be a good time to add a faith component to their sessions?

Yes. People often turn to faith in a time of crisis. A religious or spiritual perspective could give Debbie added strength during the current crisis and even extend to her post-crisis life.

No. A crisis is not the appropriate time to add an additional component to treatment. Rickie has not yet explored the facets of a faith component so she does not know if or how it can be most effective. Rickie could introduce this new component in a planned manner after the current crisis has been resolved.

17. Is it ethical for Rickie to pray for Debbie privately with or without her permission?

Yes. Praying for clients is a time-honored tradition in social work dating back to the profession's early start under religious auspices. Prayer strengthens Rickie both personally and professionally, which can only help Debbie as her client.

Research on prayer has indicated its benefits without any known negative effects (Matthews, 1998).

No. It is not ethical for Rickie to pray for Debbie without her permission. Prayer alters the relationship. Debbie may prefer a purely professional relationship. If prayer is meant to change Debbie, then Rickie may be presumptuous and manipulative to engage in prayer (Canda & Furman, 1999).

18. Do you see examples of Rickie's personal spirituality and religion clouding or improving her judgment in this case?

In the crisis situation, Rickie's personal faith may have been clouding her judgment by distracting her from the decision-making tasks needed immediately. Her focus may need to be on the professional issues rather than prayer. Rickie's frustration with the faith-sharing restrictions of a public agency may have been interfering with her ability to see possible solutions for her client within the public arena. Having minimal information about Debbie's spirituality, Rickie may have assumed that she and Debbie had more in common than actually existed, leading to faulty assessment of Debbie's behavior.

During the case collaboration with Trudy, we see how Rickie's personal faith could have been improving her judgment by helping her to clarify what is really important in this case. Throughout the case, we see Rickie's faith as a powerful motivator which keeps her engaged with a relapsing client and searching for the best possible outcome. Fortunately, she did not resort to automatic professional responses, but struggles with the dilemma.

19. How should a Christian or worker of another religious faith approach incorporating spirituality into practice?

Canda and Furman (1999) recommend first "developing an implicit spiritually sensitive relationship and context" (p. 263). Here the worker develops openness to spiritual issues and expresses common elements of good practice such as empathy, respect, and compassion. Secondly, a worker can incorporate appropriate spiritual activities with the permission of the client.

Sherwood (2002) suggests that workers address spiritual and religious issues from a "client-focused and client-led perspective" (p. 4). For Christians, the worker's role is to demonstrate the gospel of Christ through love, justice, forgiveness, trustworthiness, and caring. Explicit evangelism is almost always unethical since it risks exploiting a vulnerable client, even when the client professes the same faith as the worker.

20. How important are the relationships between the workers at the Department of Children and Family Services (DCFS) and those at other agencies? What would characterize good relationships? What could be done to improve Trudy and Rickie's relationships with DCFS?

These relationships are very important for the overall coordination of services to clients. As we see in this case, distrust of DCFS underlies workers' hesitation to report suspected neglect. Characteristics of good relationships include mutual trust and respect, as well as an understanding of distinct role responsibilities and limitations. To improve relationships, workers could meet with DCFS workers to discuss role responsibilities and limitations, policies and procedures, referral practices and ongoing collaboration between agencies.



21. How can Rickie influence or promote adoption for Cheryl in a Christian home? As social workers, what is the appropriate place for our own desires for clients? How can our own desires for a client cause us to misinterpret a case?

Rickie could have influenced adoption or other placement decisions through collaboration with the appropriate DCFS worker. However, should she have? A Christian home may have been Rickie's personal wish, but is it the best social work response in this case? Rickie may have been failing to see her own role as Debbie's counselor clearly due to her personal wishes.

22. If DCFS, not Rickie, controls further investigation and placement in this case, how could Rickie's weighing potential outcomes during crisis decision making be letting the client down? How could she be letting herself down?

By not following accepted practices and overstepping professional responsibilities (as a DJA employee), Rickie could have been risking the safety and welfare of both Cheryl and Debbie. She may have been letting herself down by allowing her fears to control or cloud her judgment.

23. What are the limits of Rickie's professional role in this situation?

The limits of Rickie's professional role were to assess the information she received from her client, determine whether a report of suspected neglect to DCFS is warranted, (if necessary) make the report to DCFS, and support her client through the process.

24. How has Rickie incorporated Debbie's spirituality in her assessment and treatment process?

Rickie has listened to Debbie's profession of faith and supported her participation in church activities. However, there is no evidence that Rickie explored the meaning Debbie gave to her own spirituality. Rickie may have assumed that Christianity had the same meaning for Debbie as it did in her own life. It appears that Rickie is assuming that she cannot explore Debbie's spirituality because she is working in a public agency. We see her wondering if she can discuss Christianity with a Christian client.

25. How may Debbie's religion/spirituality/faith be a strength and limitation in this case?

It was a strength because it provided meaning to her life, a source of internal support, and an external support network should she choose to use it.

It was a limitation if it prevented her from using other appropriate treatment resources which could be helpful to her.

26. How important was it to keep Debbie and her sister together? Why?

Debbie and Cheryl were siblings who had clearly bonded. It would have been important that they continue to have access to each other so that the relationship could be preserved. Both young people had suffered considerable trauma in their lives and we would not have wanted to add the trauma of separation. The sibling bond may actually have been stronger due to the lack of appropriate parenting

(Ward, 1984). It appeared that Debbie had assumed some aspects of the parental role (picking up Cheryl at school, preparing food and clothes for her), which may have been providing stability and a sense of safety for Cheryl. Caring for Cheryl may also have given Debbie a sense of purpose in life. Keeping Debbie and Cheryl together provided a natural support system for both siblings (Timberlake & Hamlin, 1982). While an emergency placement may have initially separated Debbie and Cheryl, workers could have planned for regular contact between siblings and eventual reunification. Without a compelling reason to separate the siblings, “best practices” would have compelled workers to keep Debbie and Cheryl together (Groza, Maschmeier, Jamison, & Piccola, 2003).

### *Action*

27. Should Trudy and Rickie report this case to DCFS? Should they do so with or without consulting their supervisors?

Yes. Trudy and Rickie have a reasonable suspicion of neglect and are required to report the situation to DCFS as mandated reporters. While it is always advisable to consult with supervisors, the obligation to report remains their responsibility.

No. Trudy and Rickie do not have sufficient or reliable information on which to form a reasonable suspicion of neglect. They need to consult with their supervisors to obtain objective viewpoints.

28. What factors should be considered in making this decision?

Factors include Debbie’s reliability in reporting the neglect information (history of lying to Rickie), any corroborating information or ways to obtain such information, legal mandates, agency procedures, consultation with colleagues/supervisors, and ethical concerns about the best interest of the child. There is a role conflict between the duty to report and confidentiality that concerns many workers. Some workers may believe that there are higher ethical standards than mandated reporting (Kalichman, 1993), including working in the best interests of the child. As stated in the preamble to the NASW Code of Ethics, “Instances may arise when social workers’ ethical obligations conflict with agency policies or relevant laws or regulations. When such conflicts occur, social workers must make a responsible effort to resolve the conflict in a manner that is consistent with the values, principles, and standards expressed in this Code. If a reasonable resolution of the conflict does not appear possible, social workers should seek proper consultation before making a decision.” Although many therapists fear disruption of the client-worker relationship by reporting, research findings do not support these concerns (Dolgoff, Loewenberg, & Harrington, 2005).

29. Should Rickie report the case to DCFS even if Trudy decides not to report?

Rickie’s legal obligation to report remains even if Trudy decides not to report.

30. Should Rickie inform Debbie if she decides to report the case? Should she do so before or after reporting? If yes, how should she handle the conversation?

If Rickie decides to report the situation to DCFS, she should inform Debbie of her decision and the potential consequences prior to the actual report if possible. NASW Code of Ethics standard 1.07(d) states: "Social workers should inform clients, to the extent possible about the disclosure of confidential information and the potential consequences, when feasible before the disclosure is made. This applies whether social workers disclose confidential information on the basis of a legal requirement or client consent."

31. How can Rickie minimize the negative consequences of reporting?

Informing Debbie of the action to be taken prior to the report could reinforce the positive relationship and promote trust between Debbie and Rickie. Reviewing the limits to confidentiality with Debbie could also help Debbie to understand Rickie's actions. If Debbie had been involved in the informed consent procedures at the beginning of treatment, there would be less likelihood of a rift in the therapeutic relationship due to the report (Steinberg, Levine, & Doueck, 1997).

32. How can Rickie incorporate Debbie's spirituality in the assessment and treatment process?

As part of the social work assessment process, Rickie could gather information about Debbie's spirituality and explore the meaning of spirituality in her life (Hodge, 2003). With Debbie's consent and appropriate supervision, Rickie could incorporate aspects of Debbie's spirituality into practice. In substance abuse treatment, reliance on a "higher power" is recognized as therapeutic and contributory to sobriety. Tailoring this portion of treatment to Debbie's own spirituality could be a benefit.

33. Should Rickie share her faith with Debbie despite working in a public agency?

In this case, Rickie expressed the desire to share her faith with her client. However, there is no indication that Debbie has requested this service or has any interest in Rickie's faith. The primary concern is whether Rickie's interest in faith sharing is based on Rickie's needs or the needs of the client. Personal sharing in social work treatment needs to relate to the client's concerns (Shulman, 2005). A public agency may be concerned about proselytizing. In a faith-based agency, a social worker may be able to approach the topic more easily but the ethical issue of potentially taking advantage of a client's vulnerable condition or imposing one's religious views on another would remain.

### *Reflection*

34. What are your beliefs about family preservation versus child safety in child welfare practice?

35. How do you establish and monitor personal and professional boundaries in practice?

36. How competent are you to work with people of different faith backgrounds? What would establish or increase your competence?

37. What are the particular challenges of working with clients with whom you share a religious/spiritual/faith perspective?

## Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Instruct students to pair up with another student for a 10-minute exercise. Ask each student to discuss their wishes for clients based on their religious/spiritual beliefs. When students have both identified their wishes, ask them to write the wishes from their dyad on the board. Then review wishes listed on the board with the class and discuss how these wishes could help or interfere with treatment.
2. In advance of the case discussion, also assign the Steinberg, Levine, and Doueck (1997) article listed in the reference section. Ask students to discuss the impact of mandated reporting on the therapeutic relationship and ways to minimize potential damage.
3. Assign students to research state law regarding mandated reporting for their home state.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### *Print*

- Ashton, V. (1999). Worker judgments of seriousness about and reporting of suspected child maltreatment. *Child Abuse & Neglect*, 23(6), 539-548.
- Canda, E. R., & Furman, L. D. (1999). *Spiritual diversity in social work practice: The heart of helping*. New York: Free Press.
- de Anda, D. (1995). Adolescence overview. In *Encyclopedia of Social Work* (19th ed., Vol. 1; pp. 16-40). Washington, DC: NASW Press.
- Deisz, R., Doueck, H., & George, N. (1996). Reasonable cause: A qualitative study of mandated reporting. *Child Abuse & Neglect*, 20(4), 275-287.
- Dolgoff, R., Loewenberg, F. M., & Harrington, D. (2005). *Ethical decisions for social work practice* (7<sup>th</sup> ed.). Belmont, CA: Brooks/Cole.
- Erikson, E. H. (1963). *Childhood and society* (2<sup>nd</sup> ed.). New York: W. W. Norton.
- Erikson, E. H. (1968). *Identity, youth and crisis*. New York: W. W. Norton.
- Gilligan, C. (1979). Women's place in man's life cycle. *Harvard Educational Review*, 49(4), 431-446.
- Gilligan, C. (1993). *In a different voice*. Cambridge, MA: Harvard University Press.

- Grozza, V., Maschmeier, C., Jamison, C., & Piccola, T. (2003). Siblings and out-of-home placement: Best practices. *Families in Society*, 84(4), 480-490.
- Hodge, D. R. (2003). *Spiritual assessment: Handbook for helping professionals*. Botsford, CT: North American Association of Christians in Social Work.
- Kalichman, S. (1993). *Mandated reporting of suspected child abuse: Ethics, law, and policy*. Washington, DC: American Psychological Association.
- Lau, K., Krase, K., & Morse, R. (2009). *Mandated reporting of child abuse and neglect: A practical guide for social workers*. New York: Springer Publishing Company.
- Mathews, B., & Bross, C. (2008). Mandated reporting is still a policy with reason: Empirical and philosophical grounds. *Child Abuse & Neglect*, 32(5), 511-516.
- Matthews, D. A. (with Clark, C.). (1998). *The faith factor: Proof of the healing power of prayer*. New York: Penguin Group.
- Melton, G. (2005). Mandated reporting: A policy without reason. *Child Abuse & Neglect*, 29(1), 9-18.
- National Association of Social Workers. (1996). *NASW code of ethics*. Washington, DC: Author.
- Reamer, F. G. (1998). *Ethical standards in social work: A review of the NASW Code of Ethics*. Washington, DC: NASW Press.
- Sherwood, D. (2002). Ethical integration of faith and social work practice: Evangelism. *Social Work & Christianity*, 29(1), 1-12.
- Shulman, L. (2005). *The skills of helping individuals, families, groups, and communities* (5<sup>th</sup> ed.). Itasca, IL: Peacock.
- Singer, M. I., & Hussey, D. L. (1995). Adolescents: Direct practice. In *Encyclopedia of Social Work* (19<sup>th</sup> ed., Vol. 1, pp. 40-48). Washington, DC: NASW Press.
- Steinberg, K. L., Levine, M., & Doueck, H. (1997). Effects of legally mandated child abuse reports on the therapeutic relationship: A survey of psychotherapists. *American Journal of Orthopsychiatry*, 67, 112-122.
- Timberlake, E. M., & Hamlin, E. R. (1982). The sibling group: A neglected dimension of placement. *Child Welfare*, 61(8), 545-552.
- Ward, M. (1984). Sibling ties in foster care and adoption planning. *Child Welfare*, 63(4), 321-332.

### **Electronic**

- Cuyahoga County (Ohio) Department of Children and Family Services. (2007). *About Us*. Retrieved October 1, 2009, from <http://cfs.cuyahogacounty.us/>
- Cuyahoga County (Ohio) Department of Justice Affairs, Treatment Services. (2007). *Youth Development Center Aftercare*. Retrieved October 1, 2009 from <http://www.ja.cuyahogacounty.us/en-US/treatment.aspx>

Drake, B., & Jonson-Reid, M. (2007). A response to Melton based on the best available data. *Child Abuse and Neglect*, 31(4):343-360. Retrieved October 15, 2009, from [http://www.ncbi.nlm.nih.gov/pubmed/17418414?ordinalpos=1&itool=EntrezSystem2.PEntrez.Pubmed.ResultsPanel.Pubmed\\_DiscoveryPanel.Pubmed\\_Discovery\\_RA&linkpos=1&log\\$=relatedarticles&logdbfrom=pubmed](http://www.ncbi.nlm.nih.gov/pubmed/17418414?ordinalpos=1&itool=EntrezSystem2.PEntrez.Pubmed.ResultsPanel.Pubmed_DiscoveryPanel.Pubmed_Discovery_RA&linkpos=1&log$=relatedarticles&logdbfrom=pubmed)

Duty to Report Child Abuse or Neglect, Ohio Revised Code 2151.421. Retrieved October 1, 2009, from [http://psychology.ohio.gov/oac/2151421/2151\\_421.htm](http://psychology.ohio.gov/oac/2151421/2151_421.htm)

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# The Grace House Ministry (A): Teaching Notes

*Michael E. Sherr and Terry A. Wolfer*

## Case Synopsis

In late 2000, as a new member of Grace Presbyterian Church, licensed clinical social worker Randy Samuels agreed to help with families that came to the church for assistance. After awhile he began questioning whether there was a better way to utilize the church's resources to help these families. As Randy became more involved, he learned that his social work knowledge, values, and skills were appreciated and useful in the congregation. At the same time, his involvement created new tensions for Randy and the congregation.

## Intended Case Use

Written for an MSW level course in micro or macro social work practice, it may also be used for specialized instruction on religion/spirituality in social work practice, congregational social work, program development, social policy, and social work ethics.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn:

1. Ways in which social work knowledge, values, and skills (e.g., clinical assessment, problem-solving, reflective listening, human behavior theory, community organizing, proposal writing, self-determination, appreciation for diversity) can be applied within religious congregations.
2. Awareness and appreciation for the specific norms of particular religious congregations.
3. How to proceed in utilizing the resources of congregations (e.g., to help others, people, desire facilities, finances) while respecting the beliefs or norms of congregations that may conflict with social work principles.
4. How social workers can advocate for vulnerable populations within their own religious congregations.
5. Appropriate integration of religious beliefs and practices and professional social work beliefs and practices within congregational settings.

## Discussion Questions and Answers

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

### *Facts*

1. What do we know about Grace Presbyterian Church?

Grace Presbyterian Church was located in Gastonia, North Carolina, and only six years old. The charter members of Grace were previous members of Redeemer Presbyterian Church, a large congregation in Charlotte. Over a relatively short period of time, the church went from a small gathering of people meeting at the pastor's home to approximately 200-250 members meeting in their own building. The church building is located in an upper middle-class neighborhood and the majority of members are young. Grace belongs to the Presbyterian Church in America (PCA), a conservative denomination that split away from the Presbyterian Church in the United States of America (USA) in the mid 1970s. Historically the denomination focuses more on evangelism than on social ministry (To learn more about the history of the PCA, see <http://www.pcanet.org/general/history.htm>). The leadership at Grace, however, appears to consider social ministry as vitally important to the congregation.

2. Who was Randy Samuels and what did he bring to this situation?

Randy was married and had two children. He recently moved to Gastonia after accepting a position as lead therapist on an intensive family and child unit at Mecklenburg County Mental Health Center. This was his second professional position. After graduating with his MSW from East Carolina University, he worked for Pitt County Mental Health Center for two years, completing all of his requirements for state licensure in North Carolina (LCSW).

Randy also appeared to be a Christian. He and his family completed the membership course and became members of Grace in June of 2000. They were actively involved in worship services, small prayer groups, and other activities of the congregation.

However, before agreeing to help Kenneth Baum and the pastor, Randy was content with his participation with the church. He was basically a consumer, participating in church activities for his own fulfillment. He also thought that he was participating in social ministry in his job as a social worker. He had no intention of mixing the two.



### 3. What is the Session?

In the PCA denomination, the teaching and ruling elders and deacons of the church make major decisions. Elders and deacons are elected by the congregation and are charged with the responsibility of ensuring that the church continues its function of proclaiming, administering, and enforcing the law of Christ as revealed in scripture. They do this by preaching the gospel of Jesus Christ, administering the sacraments (Baptism and Lord's Supper), reproving the erring, visiting the sick, and comforting the afflicted (To learn more about the beliefs, practices, and governance structure of the PCA, see <http://www.pcanet.org/bco/>).

#### *Analysis*

4. When Randy met with families at the request of the elders and deacons, was he in the role of social worker, church member, or both? If the answer is both, how might this affect the interactions he has with these families?

The case provides very little detail about exactly what Randy does when he meets with families. It mentions that in the meeting with the first woman, Randy helped her identify and prioritize her needs, and helped her and the church determine what steps to take next. Steve Edwards (the pastor) and Kenneth Baum (an elder) were present at the interview and they were impressed with how Randy handled the situation. This provides some circumstantial evidence that Randy was at least utilizing some of his social work interview skills.

Randy's experience in his professional practice also enabled him to recognize the pattern of helping practices at the church. He used explicit references to his education and experience in his conversations with the pastor and the Session.

When he began volunteering, Randy participated primarily as a member of the congregation. Nevertheless, he used social work knowledge and skills for interviewing families and consulting with the pastor and elders. Deciding what role he is operating from may help determine what actions are appropriate or inappropriate. It may be necessary, however, to also decide which role is primary because the two roles provide contradictory prescriptions.

If students suggest that he has both roles, use the following questions to explore the relationship further. For example, if Randy meets with someone who is homeless, is it appropriate for him to offer this person a place to stay? [As a church member, this may be encouraged while as a social worker, this is considered unacceptable.] Is it appropriate for Randy to pray with these families? To share his beliefs about salvation in Jesus Christ? What about confidentiality? Is it okay for other people to be present when Randy interviews families? Should he keep records? Is Randy professionally liable? If, in interaction with families, Randy learns of parents spanking their children, does he have an obligation to report this as child abuse? What if the people he is meeting with already meet with another social worker or helping professional, does he have an obligation to communicate with the other professional? Ultimately, is Randy meeting with clients, or are they fellow (or potential) brothers and sisters in Christ?

5. In what ways do Randy, the pastor, and the Session agree and disagree regarding the use of the deacon fund?

On the one hand, they appeared to agree on the overall purpose of the deacon fund. All of them thought it was good for the congregation to assist people who come to them for help. They also appeared to agree that the deacon fund was a way to express God's unconditional love for people in need. Furthermore,

Randy and the pastor agreed that poverty was the underlying social problem. On the other hand, they apparently disagreed about the best way of fulfilling the purpose of the deacon fund. The pastor and the Session wished they could help everyone adequately but they don't have enough resources. At the same time, they did not want to send anyone away who needed help and they didn't want to be stingy. They used the deacon fund liberally, without many stipulations. After all, each time they help, it opened the door to the possibility of sharing the gospel.

Drawing from his social work education and experience, Randy recognized the fundamental dilemma of unlimited needs and limited resources. However, he feared the church was only providing temporary band-aids to the problems these families faced. He advocated for the church to reconsider using the deacon fund more deliberately in a way that will be most effective, given the fact of limited resources.

6. What was Randy's main concern regarding the deacon fund?

Randy was concerned that the church ended up expressing the opposite of God's unconditional love. Making the analogy to his professional practice, Randy explained to the Session how families may actually become hardened to the message of salvation if the Church promised too much and was not able to deliver. He said, "We don't want to offer help and refuge to families, tell them about Christ's unconditional love, only to turn them away when we realize that a family's issues may require more time and money than originally expected."

7. What helped congregational leaders take Randy's assessment of the deacon fund seriously?

Randy became a member of the Grace and participated in worship and activities before getting involved with helping the elders and the pastor. The church leaders and congregants looked at Randy as a fellow brother in Christ. He also invested a significant amount of time helping the church leaders. Finally, his concerns developed from his experience helping the church and his intentions were perceived as genuine.

8. What were Randy's concerns about making promises to clients? What are the risks of making promises in a congregational setting?

Drawing from his social work experience, Randy explained that he was careful to avoid making promises that he couldn't keep. Randy was concerned that false expectations could lead families to become mistrustful and make it difficult for other social workers to help them in the future. In the same way, when people in a congregation make promises they can't keep, they risk creating or reinforcing a mistrust that families may have of the church. What starts out as a church effort to "help families in a way that may lead them to being receptive to hearing the Gospel," may unintentionally become a barrier.

9. What appeared to motivate members of this congregation to provide help to people? How did their motivations differ from Randy's in a professional social work capacity?

The case highlights at least two underlying reasons the church was interested in providing assistance to families in need. First, the pastor explained that the church was for the nonbeliever and especially those in need. In essence,

providing assistance was a way of putting members of the church in contact with nonbelievers. Second, and connected to the first reason, once members made contact with nonbelievers, providing assistance facilitated opportunities for members to share information about their beliefs and the church. As a social worker, Randy's primary commitment was to serve and promote the well-being of clients. Although he saw his work as "social ministry," Randy's ethical responsibility was to keep clients' needs as primary. Stated differently, Randy's personal desire to share his religious beliefs did not supersede the process of the helping relationship.

10. How did people in this congregation appear to understand the causes of poverty, and ways to deal with it?

The case does not provide a clear indication how people in this congregation understood poverty. But several examples suggest that they do not think about poverty as a systemic issue. From the stated purpose of the deacon fund, it appears that people in the congregation emphasized helping individuals in need of assistance. For example, Kenneth Baum's initial contact with Randy seems predicated upon a desire to assess and help a specific woman who came to the church for help. Over the following weeks, Randy's interaction with families continued to focus on meeting their individual needs. When Randy eventually raised concerns with the pastor, he explained that the underlying reason many families were in need was poverty. As Randy explained, the type of help the church provided was a temporary band-aid to deal with a symptom of poverty.

#### *Action*

11. What are some suggestions Randy could make to the Session? What are some of the factors Randy may need to consider before offering these suggestions?

There are many suggestions Randy can make to the Session. Two simple suggestions are either to refer all families that come for help to the local agencies or to hire Randy to handle all of the families that come to Grace. Given the enthusiasm of the church to help families, however, neither of the previous suggestions will likely be received well by the Session. Suggestions that may be more realistic include: 1) Offer training to the church leaders and other lay people in conducting needs assessments and basic counseling skills; 2) Conduct a needs assessment in the community to see what services are actually needed and then decide how to use the deacon fund; 3) Provide information about Charitable Choice and suggest partnering with community agencies and/or other religious congregations; and 4) Use resources from the deacon fund and the congregation to provide long-term comprehensive assistance to a small number of families.

When choosing to offer a suggestion to the Session, Randy needs to consider factors concerning the congregation and himself as an individual. On one hand, Randy needs to consider the desire, willingness, and capacity of the congregation's leaders and members to provide services. As a relatively young and enthusiastic church, he must be careful not to either squelch their enthusiasm or give a false sense of hope. On the other hand, whatever Randy suggests, he needs to carefully consider his level of future involvement. After listening to his suggestions, the Session may ask Randy to help make the changes or to even lead the efforts in making the changes. Randy needs to be sure he and his family are prepared and in agreement on how much time Randy can afford to spend on ministry.

12. Even if the Session was receptive to Randy's ideas, it will probably take some time to make changes. Should Randy continue to meet with families until then? Why or why not?

As suggested previously, Randy needs to answer several questions before deciding to continue meeting with families (see question #4). In general, he needs greater clarity about his role as a social worker in the congregation. Furthermore, he must decide what level of involvement he can sustain, to avoid providing services that raise expectations but exhaust him and ultimately disappoint the congregation or beneficiaries.

13. How can Randy build on the motives of the congregation to help people in need?

As with any client system, Randy needs to appreciate these motives as a vital and legitimate part of functioning as a congregation. By understanding and validating the congregation, Randy can help the pastor and other lay leaders realize that improving their efforts to provide assistance will directly impact their efforts to reach nonbelievers and especially those in need. For instance, Randy can use his social work roles as educator and linking agent to broaden their understanding of poverty to include a systemic perspective. As a linking agent, Randy may want to consider brokering a collaborative arrangement with an agency or advocacy group that might bring church members into greater contact with people in need. As part of the brokering process, Randy can also bring church members into contact with other social workers (or human service professionals) and facilitate dialogue to find common ground in efforts to provide services. Such dialogue has the potential for greater involvement in partnerships to serve people in the future.

14. If Randy does not agree with the Session's decision, how can or should he respond?

If Randy does not agree with the Session's decision, he is likely to find himself confronted with a personal and professional ethical dilemma. He will have multiple things to consider in deciding how to respond and consequences no matter what he decides. One option may be to leave and find a new church. However, Randy was married and had two children. What if they like the church and don't want to leave? As part of a family, Randy can't just decide to leave on his own. Another option may be to cease volunteering to see families. If he stops, however, it may create an awkward situation in relationships for him at church. Consequently, he may become even more uncomfortable going to church. If Randy decides to continue seeing families, he may feel compelled to use more and more of his personal time to do something that he finds disheartening. He could, however, simply set a personal boundary for the level of involvement he can afford. He may also question whether he is providing ethical practice. It is clear that he is being asked to use his social work knowledge and skills to serve the church; therefore, he needs to consider the NASW Code of Ethics, especially issues of informed consent, conflicts of interest, and dual relationships.

### *Reflection*

15. Do you retain your social work identity and role while attending church? Why or why not? What difference does that make?

16. How, if at all, does being a “social worker at church” constrain your behavior as a Christian (e.g., witness, fellowship)?
17. In your own current congregation, how could you use your professional social work knowledge, skills, and values?
18. If the leaders of your congregation were interested in addressing an important social issue in your community (e.g., poverty, homelessness, immigration, racism), what would you want to tell them? How would you offer to assist them?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Assign students to read the case before class and prepare to discuss whether Randy is in the role of a social worker or a church member when he meets with the family. Begin class by asking for a show of hands by those who think Randy’s primary role is that of a social worker. Next ask for a show of hands by those who think Randy’s primary role is that of a church member (Some students may think Randy must balance the two roles. At this point, however, ask students to choose between the two.). Now have students list knowledge, practice skills, ethical issues, and other factors that Randy needs to consider when meeting with the family. As students mention things, start a list in the front of the classroom. Be sure to mention things such as confidentiality, record keeping, payment, prayer, sharing the Gospel, potential ethical dilemmas, suspecting abuse or neglect, and so on. The stage is now set for two different role play scenarios. First, have a few students role play what they think happened in the meeting with Randy, Kenneth, pastor Steve Edwards, and the woman. Next, have a few other students role play Randy meeting with a woman in a similar situation, only now pretending that it is Monday morning in his office at Mecklenburg County Mental Health Center. After the role plays, elicit discussion with questions about how meeting with the woman in the church and the mental health office are similar and different. Be sure to focus questions on what Randy might do in the church that he may or may not do in the office. At the end of class, ask students to write a 2-3 paragraph statement about how they view their roles as social workers and congregational members.
2. Assign students to read an article on Charitable Choice (e.g., Carlson-Thies, 2001; Cnaan & Boddie, 2002). Following the case discussion, explore the following questions: How close is the congregation to securing Charitable Choice funding? What concrete steps should the congregation take to obtain funding?

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

*Print*

- Chaves, M. (1999). Congregations' social service activities. *Charting Civil Society*. Washington, DC: The Urban Institute.
- Chaves, M. (1999). Religious congregations and welfare reform: Who will take advantage of charitable choice? *American Sociological Review*, 64, 836-846.
- Cnaan, R. A., & Boddie, S. C. (2002). Charitable Choice and faith-based welfare: A call for social work. *Social Work*, 47(3), 224-235.
- Garland, D. S. R. (1985). Family life education, family ministry, and church social work: Suggested relationships. *Social Work and Christianity: An International Journal*, 12(2), 14-26.
- Garland, D. R., & Bailey, P. L. (1990). Effective work with religious organizations by social workers in other settings. *Social Work and Christianity*, 17(2), 79-95.
- Kennedy, S. S., & Bielefield, W. (2007). *Charitable Choice at work: Evaluating faith-based job programs in the states*. Baltimore, MD: Georgetown University Press.
- Lynn, L. E. Jr., (2002). Social services and the state: The public appropriation of private charity. *Social Service Review*, 76(1), 58-82.
- Monsma, S. V., & Soper, J. C. (2007). *Faith, hope, and jobs: Welfare-to-work in Los Angeles*. Baltimore, MD: Georgetown University Pres.
- Netting, F. E., Thibault, J. M., & Ellor, J. W. (1990). Integrating content on organized religion into macropractice courses. *Journal of Social Work Education*, 26(1), 15-24.
- Schwartz, A. (2003). Stable vision: Charitable Choice and the routinization of charisma. *Social Work and Christianity*, 30(1), 52-63.
- Sherr, M. E., & Wolfer, T. A. (2003). Preparing social work students for practice with religious congregations within the context of Charitable Choice: The Grace House Ministry (A). *Social Work and Christianity*, 30(2), 128-148.
- Sherwood, D. A. (2001). Testing time for Charitable Choice: can we turn goals into good practice? *Social Work and Christianity*, 28(1), 1-5.
- Sherwood, D. A. (2000). Charitable Choice: Still an opportunity and challenge for Christians in social work. *Social Work and Christianity*, 27(2), 98-111.
- Sherman, A. L. (2000). Tracking Charitable Choice: A study of the collaboration between faith-based organizations and the government in providing social services in nine states. *Social Work and Christianity*, 27(2), 112-129.
- Sherwood, D. A. (2003). Churches as contexts for social work practice: Connecting with the mission and identity of congregations. *Social Work and Christianity*, 30(1), 1-13.
- Staral, J. M. (2000). Building on mutual goals: The intersection of community practice and church-based organizing. *Journal of Community Practice*, 7(3), 85-95.

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## THE GRACE HOUSE MINISTRY (B)

*Michael E. Sherr and Terry A. Wolfer*

After thinking a moment, Randy responded, "I don't know exactly what to do but I do know some things have to change. For instance, I think Grace needs to utilize the deacon fund more deliberately. Perhaps the church can develop an assessment procedure that would help the deacon on call gather appropriate information so he can make an informed decision on how the church can help. More importantly, Grace should focus its resources on one or two populations in need. The church can do an assessment of the services provided in Gastonia, and focus on meeting a need that is not available in the community."

### **The Committee**

The Session agreed with some of Randy's suggestions and decided to form a committee to explore ways to improve the use of the deacon fund. The committee was to meet each Thursday and report back to the Session in late February, 2001.

Pastor Edwards asked Randy to be on the committee. Randy, encouraged by the Session's willingness to take his concerns seriously, readily agreed to participate. Jeff Hatling and Tom Chewning volunteered for the committee because they were currently helping two families that had been coming to Grace. In his late thirties, Jeff was married with two children. He worked for the City of Charlotte as a zoning coordinator. Tom was in his early forties, in his second marriage, and had three daughters. Tom used to manage a grocery store, but recently started his own lawn and handyman business. They were both deacons. Several people suggested that Kenneth Baum join the group because he was the elder responsible for overseeing the deacons, and he agreed. Kenneth and his wife were two of the original members of Grace Presbyterian Church. He was in his mid fifties, and owned a successful computer repair business.

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## Getting Focused

"It seems to me," Randy suggested during the committee's first meeting, "that Grace needs to focus on a specific population that we want to help. From my experience, most of the existing services available in the community do a good job of providing help in emergencies and for brief periods of time. They are also concerned about helping as many people as possible. Therefore, Grace doesn't need to provide more of this type of support."

Tom confirmed, "That is exactly the problem I am having with Tammie."

"What do you mean, Tom?" Kenneth asked.

"I have been trying to get Tammie and her kids situated, but I spend so much time running her to different agencies, helping her fill out paperwork, for one bit of resources after another. She's just making it from month to month, so there's no time to get her to the point where she can really turn things around."

Kenneth asked, "Maybe the church could help her go back to school?"

"She would love to go back to school," Tom replied, "but there is no way she can do that without a lot of support."

"And what about Gayle?" Jeff added. "She told me Sunday that she's about to lose her benefits. How is she supposed to keep a job while raising four kids on her own?"

"What about Debbie?" Tom chimed in. "She's been struggling to survive ever since her husband died last year."

The group recalled other examples until Randy made an observation. "All of the cases we've been talking about have one thing in common. They're all single women, who for one reason or another are having a tough time making ends meet."

"That's true," Jeff replied.

Randy ventured, "Perhaps Grace Presbyterian Church needs to make a conscious decision that we will use our resources to make a real difference in the lives of single women with children."

"Isn't there a shelter in Charlotte," Kenneth asked, "run by the Salvation Army, that helps women and children?"

"Yes, there is," Randy answered, "but the Salvation Army gives women only sixty days. The types of changes we are talking about will take longer than two months. For example, if the church decides to help Tammie go back to school, that will take at least two years, maybe longer."

"So," Jeff observed, "we're talking about making a long-term commitment to help single women with children."

"That's what it sounds like to me. The question I have is how can we do that for everyone that comes to Grace for help?" asked Kenneth.

"Recognizing there are infinite needs with limited resources," Randy commented, "perhaps we can determine how much it would cost to help one family, and I mean really help them turn their lives around. Then we can decide how many families we can afford to make that kind of commitment to at the same time. If we can only help 3 or 4, then we only help 3 or 4."

Jeff asked, "Would we turn the rest away?"

"Well," Randy answered, "we could still interview them, find out what they need, and then refer them elsewhere. I believe making a long-term commitment to a few families would be different from other programs . . . we could really help some people climb out of poverty."

Looking down at his watch, Tom broke in, "Hey, guys, it's almost 8:00 . . . I've got to go and pick up Rebecca from gymnastics."

"Okay," Kenneth replied, "let's pick this up next Thursday. So far it sounds as if we all agree to focus on single women that have children and to consider making a long-term commitment to as many as we can. I'll type up the minutes from the meeting and send them to everyone. Tom, would you close us in prayer?"

Randy interrupted quickly, "Can I make one suggestion?"

"Certainly," Kenneth said.

"Well, if we want to seriously attempt to help single women with children, there is something missing on our committee."

"What's that?" asked Kenneth.

"There're no single women with children on the committee," Randy answered. "It's very important that we have people who are potential consumers of our program being part of the planning. We may think we know what these women need, but as middle-aged and middle-class men, we have no idea. If we develop a program, we want to make sure that our intended population will use it."

"You're right," Jeff answered, "perhaps we can ask Tammie or maybe even Charlene."

Tom added, "Charlene would be perfect. She's been there, but is also remarried, has a job and is doing great."

Kenneth commented, "I think we should ask both of them to come next week. Let me just talk to Steve and tell him that we want the women to be on the committee."

"Is that a problem, Kenneth?" Randy asked.

"Not really, it's just that Grace has never had women on committees before. It shouldn't be a problem, but out of courtesy I want to let Steve know what we're doing."

"All right," Tom responded, "let us know tomorrow and if it's okay we'll talk to the girls over the weekend."

Tom got the group's attention and said, "Great, let's bow our heads and pray."

### **The Committee Expands**

When Kenneth talked with the pastor, he gave the committee his blessing to include Tammie and Charlene. Tom spoke with both women and they were excited about joining the committee. Charlene was currently a successful accountant. While raising a daughter on her own, she put herself through school. A few years ago she remarried. She and her husband lived in a large suburban home with

Charlene's teenage daughter, three teenage children from her husband's previous marriage, and two young children of their own. In contrast, Tammy continued to struggle following a heated divorce. She had two children and received no financial support from her ex-husband. She had been working part-time as a layout artist, but was forced to quit because she could not afford to pay for two children in day care. She was currently receiving TANF. If given the opportunity she would like to finish her degree in marketing. Charlene and Tammy attended church almost every week.

Over the next four weeks the group came to a consensus on several key recommendations. First, Grace should continue to use the deacon fund to help meet emergency needs, and develop a separate ministry focused on making a long-term commitment to single women with children. Second, the committee should do an in-house assessment of the interests and spiritual gifts of all members to rally support from the entire congregation. Third, although the ministry will take time and start off slowly, the Session should establish the ministry as a 501(c)3. This way the church could consider entering into partnerships with agencies and applying for grants. Eventually, the group began to share a vision for the ministry that involved owning a house that would provide long-term housing, without governmental regulations, where women can be treated with respect and loved unconditionally, and work with the church to get back on their feet. This vision inspired the group to begin calling themselves "The Grace House Ministry."

### **Developing the Mission Statement**

With just two weeks left before the committee reported back to the Session, the group decided to use their meeting to develop a mission statement. They had been meeting in the church office, but held this meeting in one of the Sunday school classrooms so they could use a dry board. Randy, Jeff, Tammie, Charlene and Tom sat in a semi circle facing the board. Kenneth remained standing so he could write down ideas from the discussion.

After opening up in prayer, Kenneth commented, "I've been keeping Steve informed about our meetings and he is looking forward to the Session meeting. I will try and type up something for next week, so we can look at it before we give it to the Session. Randy, you've mentioned the last few weeks that we need to develop a mission statement and I completely agree. I think the rest of the elders will appreciate that we've taken the initiative to synthesize what we are trying to do here."

Addressing everyone, Randy added, "Remember the mission statement is a broad statement that describes what The Grace House is for or why The Grace House exists."

Jeff broke in saying, "Why don't we start by going around the room and sharing what each of us envisions the Grace House to be."

With everyone in agreement, Kenneth asked Tom to start.

"I think," Tom paused, "I think the Grace House Ministry must maintain a Christ-centered focus where families are supported and provided with an opportunity to become productive members in the community."

Kenneth turned to Charlene, "What do you envision?"

"I know back before I married Hugh," Charlene responded, "I would have benefited from a place where I could have time to save money to buy a car or even a home. I was in so much debt after my first husband left that it was impossible for me to save any money. If the Grace House existed I would have lived there and saved money."

"So, Charlene," Randy clarified, "you see the Grace House as providing an alternative place to live for women who are in debt?"

"Exactly."

"Okay," Randy continued, "so the Grace House is not necessarily just for people who are homeless. Instead, we want it to be a place where women would feel comfortable choosing to live."

"What do you think, Tammie?" Kenneth asked.

"I agree with Charlene."

"Jeff?" Kenneth probed.

"All I know is that The Grace House has got to do more than just provide shelter. I would like to see us help people find housing, finish school, get a job, get counseling, and medical attention if needed."

Kenneth stepped in, "What about this for a mission statement?" He proceeded to write on the board, "The Grace House Ministry is a comprehensive program, rooted in the redeeming work of Christ, supporting single women with children to live independent lives."

The group sat silently as they considered the statement. Jeff was the first to speak, "It sounds good to me."

Tammie quickly responded, "Yeah, most of it looks okay, but I'm not sure about the ending."

"I agree with Tammie," Randy added. "In social work we don't like to use the word 'independent,' instead we think of healthy functioning as interdependent. 'Interdependent' recognizes the need for relationships, and I believe it's more in line with the Gospel."

"Randy makes sense," Tammie continued, "but that is not exactly what I was thinking. I was thinking about the message we want to be sending to women that come to us for help."

"What do you mean, Tammie?" Kenneth asked.

"We don't want to promote the idea that the Grace House Ministry supports women remaining single. We want them to turn their lives around, but we don't want to encourage them not to remarry."

"I know what you're saying, Tammie," Randy responded, "but in my experience often times these women are coming out of bad relationships. I think there is nothing wrong with them taking their time to put their lives back together before jumping back into a relationship."

“That’s fine but we still don’t want to contribute to them thinking they can and should do it on their own for the rest of their lives.”

“I agree with Tammie,” Kenneth jumped in, “when God created the covenant of marriage between men and women He was giving us His way for living as a family. So we need to express clearly in the mission statement that we love these women unconditionally, we support and want to help them put their lives back together, but we encourage them not to discount the possibility of entering into marriage later on in their lives.”

The committee members continued discussing this issue for the next hour. It was 9:30 and they still did not agree on a mission statement. Randy felt torn inside. On one hand, as a Christian, he agreed with Tammie and the rest of the group. On the other hand, as a social worker thinking about a client’s right to self-determination, he was unsure how effective a program would be where women were given the message that the church viewed their living arrangements as less than ideal. As a clinician, he also knew that helping relationships are not very effective when the helper thinks he or she knows what’s best for the client and tries to persuade the client to agree. How could he help the group develop a mission statement that acknowledged the church’s position (as well as his own) about marriage, communicated a welcoming environment where women will want to come to the Grace House, and effectively supported them in putting their lives back together?

# The Grace House Ministry (B): Teaching Notes

*Michael E. Sherr and Terry A. Wolfer*

## Case Synopsis

After listening to his suggestions, the pastor asked Randy if he would participate on a committee to explore ways to improve the use of the deacon fund. Over the next few months, the committee took steps to create a preliminary plan. As a part of the committee, Randy used his mezzo and macro knowledge and skills to shape the membership and direction of the committee. A few weeks before the group reports back to the Session, however, a significant disagreement among the committee members created a new dilemma Randy.

## Intended Case Use

Written for an MSW level course in micro or macro social work practice, it may also be used for specialized instruction on religion/spirituality in social work practice, congregational social work, program development, social policy, and social work ethics.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Concrete steps for starting a non-profit program, especially in the context of a particular congregation.
2. The importance of conducting a needs assessment to inform program development (i.e., identifying resources already available, estimating level of need).
3. Potential benefits and challenges of involving prospective clients in program development.
4. Successful social work practice often requires effective participation on a diverse team.
5. Considerations for leading a task group or committee, especially in a congregational context.

6. The importance of mustering resources and people for program development, and special considerations for doing so in a congregational context.
7. How the social work value of client self-determination applies at the programmatic level.
8. When working in a congregation, social workers must balance the needs of the congregation as an organizational client with those of program recipients.
9. To be effective, social work in a host organization must begin with the organization's primary mission and identify ways to support it.
10. Fit of social work in a congregation setting (a "no go"?)
11. Ways in which social work knowledge, values, and skills (e.g., clinical assessment, problem-solving, reflective listening, human behavior theory, community organizing, proposal writing, self-determination, appreciation for diversity) can be applied within religious congregations.
12. Awareness and appreciation for the specific norms of particular religious congregations, and how these influence or constrain social work practice.
13. How to proceed in utilizing the resources of congregations (e.g., to help others, people, desire facilities, finances) while respecting the beliefs or norms of congregations that may conflict with social work principles.
14. How social workers can advocate for vulnerable populations within their own religious congregations.
15. Appropriate integration of religious beliefs and practices and professional social work beliefs and practices within congregational settings.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommended a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

## *Facts*

1. Who were the committee members? How were they selected for this task force?

At first, the committee consisted of Randy, Jeff Hatling, Tom Chewning, and Kenneth Baum. Tammy and Charlene joined the group at the second meeting. The case indicates that there were specific reasons for each person selected for the committee. Randy joined the committee because he was asked by Pastor Edwards. Encouraged by the Session's willingness to take his concerns seriously, Randy agreed to participate. Jeff and Tom volunteered for the committee because they were currently helping families at the church. At the suggestion of the session, Kenneth joined the committee because he was the elder responsible for overseeing the deacon fund. Tammy and Charlene were selected because of their experiences as single women with children.

2. What is the purpose or mandate of this committee?

The case indicates that the Session established the committee to explore ways to improve the use of the deacon's fund. The committee was charged with meeting each week and making a report to the Session in February 2001.

3. What authority does this group have? How is it linked to the church leadership?

The group has limited formal authority. As indicated in question #2, the group is sanctioned to make recommendations to the Session. The recommendations may or may not be considered. A closer look, however, reveals that the group may have significant informal authority. Because Kenneth is an elder, and Tom and Jeff are deacons, the suggestions of the committee will at least be supported by three members of the Session. Moreover, as one of the first members of the congregation, Kenneth probably has an especially influential role on the Session. At this point, it is also clear that the leaders value Randy's perspective as a professional social worker.

4. What is a needs assessment? What is the purpose of a needs assessment for developing a program?

A needs assessment involves gathering all the critical information needed about a client system to plan and implement an intervention. In the context of generalist social work practice, a needs assessment is the second step of the seven step change process that includes engagement, assessment, planning, implementation, evaluation, termination, and follow-up. In program development, a needs assessment can have at least three purposes: 1) To identify the needs of potential clients; 2) To identify services that are already provided; and 3) To identify needs that are not being met by existing programs. After engaging the church, Randy recommends assessing the services in Gastonia. At the first meeting, Randy then uses his knowledge of the services to help the group identify the needs they see at the church and the needs not provided in the community. This enables the group to target their efforts in the area of greatest need.



## *Analysis*

5. Why did Randy want to invite the women to the group? Why was that important? How was this viewed by the other committee members?

At the end of the first committee meeting, Randy suggested that the group invite single women with children to participate in the group. His suggestion was important for at least two reasons. First, he shared that it was important to include potential consumers of the program to make sure that people would actually use the services. Despite their good intentions, Randy suggested that as middle-aged and middle-class men, the committee members probably had little idea about what these women need. Second, as a social worker, it was important to provide disenfranchised client systems (in this case single women with children) opportunities to enhance their own and others' well-being. In doing so, social workers carry out their practice in a way that promotes social justice and the dignity and worth of the person—two of the core values of the profession.

The other committee members apparently accepted Randy's rationale.

6. How do members of an organization typically respond to organizational change?

Because organizations consist of people, their response to change is in many ways similar to working with individuals and families. In social work practice with individuals and families, it is common for these smaller client systems to develop routines in their social functioning. On one hand, some routine is good because it provides people with a sense of structure and stability. On the other hand, too much reliance on routine can make it difficult for people to function effectively in a dynamic environment. When change is needed, it is usually a slow and difficult process for people to modify their routines. Because organizations are larger client systems, change is even slower and more difficult. In fact, the purpose of an organization is to provide stability and accomplish goals in a strategic and coordinated manner.

7. Why focus the program on "single women with children"?

The case indicates that the decision to focus the program on single women with children occurred in two steps. At the beginning of the first committee meeting, Randy suggested that the church focus on serving a specific population. Drawing from his experiences with services in Gastonia, Randy also shared that most of the existing services are concerned with meeting the emergency and short term needs of as many people in the community as possible. He didn't want the church to provide more of the same type of support. The committee's attention then turned to selecting a specific population. As members of the group shared their experiences and hopes of helping people, it seemed that they all had one thing in common. Finally, Randy used his reflective listening skills to point out that each of the members shared stories of working with single women with children. He suggested that the church make a conscious decision to use their resources to help this specific population.

8. What are the challenges of social work program development in a congregation?

Program development in congregations offers great potential for collaboration and innovative service delivery. Nevertheless, there are also several

challenges. Congregations are essentially voluntary organizations gathered together for the primary purpose of worship. Although providing social services may be important to some congregations, it is still a secondary function. Another challenge is the diversity of the members. People in congregations represent many different social, occupational, economic, educational, and political perspectives. Although social workers may appreciate this degree of diversity, it can prove challenging to get members to agree on a course of action. There will be people in congregations who don't see social issues the same way as social workers. In fact, they may see entirely different causes and solutions. There are likely to be people in the church who don't agree with the program development. Finally, time commitments can also be a challenge for program development in congregations. Members in congregations are often juggling multiple responsibilities in the church, at work, and within their families. They may not have enough time and energy for their congregations to take on an additional program.

9. What would be reasons to NOT develop such a program in a congregation?

There are several reasons not to develop such a program in a congregation. First is the issue of sustainability. Religious congregations exist to bring people together for worship. Resources needed for social programs have to be acquired on top of the resources needed in the church. Developing and maintaining the fiscal and human resources needed for social programs is hard enough when the program is the primary focus. Another reason is goal displacement. Goal displacement occurs when an organization loses sight of its intended mission or vision. Developing social service programs in congregations could potentially shift the focus of the congregation from worship to service. This is especially true when there is a lot of money involved. If a church gets used to a social program providing extra revenue from donations, grants, or fees, keeping the program going may become more important than the effect it has on the congregation. Finally, it may be difficult to maintain ethical and accountable services in a congregation. Even with the best of intentions, when people access the services in a congregation, they may feel unduly pressured to attend the church. Moreover, it will be difficult for social programs in congregations to track measurable outcomes. Evaluating services is an important part of providing effective social programs. However, evaluation can take even more time and money away from a congregation. Without ongoing evaluation, programs can become susceptible to fraud, as well as unethical and inefficient practices.

#### *Action*

10. How should Randy respond to a colleague's demeaning language (e.g., referring to prospective committee members as girls)?

It will not be possible, in a congregation or any other organization, to address all such incidents. But it may be important to challenge the thinking reflected by such language, especially in the context of a program designed to address needs of women. Ensuring that women are represented on the committee will be one way to do this. More immediately, he could respond by himself referring to these women as "women" or, more directly, by commenting on the use of "girls" to refer to adult women. This incident may provide a teachable moment for the committee, alerting them to the ways their language and assumptions may be offensive to others.

11. How should the proposal be presented to the session?

As change agents, it is important for social workers to learn that how they communicate is just as important as what they communicate. After spending weeks developing a proposal, the committee needs to present their information in a way that the Session will seriously consider their suggestions. Given what we know about the congregation, any proposal will have to directly address how their suggestions fit with the mission of the church. It will be critical to cast or frame the proposal as something that will enhance the church's potential for outreach ministry—the key reason the church has the deacon fund. It will also be important to discuss administrative details, including plans for including members, funding, and next action steps. Presenting a comprehensive and specific plan will give the Session more confidence in the proposal.

12. Who should present the proposal?

Choosing who presents the proposal is as vital as what is presented. At first glance, it may seem that Randy would be the right person to present the proposal. After all, he has the expertise. He also was the one invited to talk with the Session in the first place. At the same time, Randy has only been a member of the church for a few months. It's one thing for the leaders to listen and respect his opinion. It's another thing for the leaders to persuade congregational members to enact a major initiative in the church. As one of the founding members of the church, Kenneth Baum probably has more influence in the congregation than anyone else on the committee. He can also frame the proposal to fit into the context of the evolving history of the church. Again, with Kenneth and the two deacons at the meeting, the committee already has three supportive stakeholders.

13. What is the role of the task force after presenting the proposal?

The purpose of a task force is to accomplish a time-limited assignment. For that reason, the committee should not expect to play a role after presenting the proposal. Nevertheless, if the Session agrees with the proposal, they may want to create a planning group to begin implementing it. It is reasonable to assume that the Session will ask at least some of the members of the task force to participate. Another possibility is that the Session may ask the task force to implement the proposal. If that happens, members of the committee will need to decide whether they have the time and desire to continue. Implementing the proposal will require a bigger commitment of time and energy.

14. Should the women be at the presentation? How may that affect the outcome?

Deciding whether the women from the committee should be at the presentation is a complicated question. As social workers, it is important to assess and understand the culture of a community. In this case, the community is a conservative evangelical church that has a certain way of governing its affairs. As such, only men are allowed to serve in leadership positions in the church. For this congregation, the policy is not driven by a desire for gender discrimination, but a core belief in how they attempt to live out their understanding of Scripture. In fact, most women of the church probably support how the church is governed. Therefore, the question of whether the women should be at the presentation needs to be assessed by looking at the effects it can have on the outcome. On one hand, the women's presence might validate the potential impact of the proposal. On the other hand, members of the Session may see the women's presence as a

sign that the proposal could be detrimental to the primary mission of the church. Remember that the elders are responsible for ensuring that the church maintains its focus on the Gospel of Jesus Christ. Moreover, the governance of the church is seen as direct biblical guidance for maintaining that focus. Bringing women to the Session could be interpreted as directly opposing that biblical guidance.

15. What are the competing values or preferences in the committee's discussion? What are their sources? Which is most important?

Kenneth expresses a preference for independence, a traditional American cultural value, while Randy spoke up for interdependence, an important social work value. Hearing their comments, Tammy clarified that she wanted Grace House to promote marriage, a value likely drawn from her American and Christian cultures. Despite Randy's reservations, it seems apparent that the committee members share a preference for marriage, though possibly for quite different reasons. It's likely that they each appreciate independence in some situations and interdependence in others (and also dependence in still others, e.g., infants, people with dementia or physical limitations). Nevertheless, disagreements such as this tend to encourage dichotomous thinking and emphasize certain values at the expense of others. Knowing this, Randy will be in a better position to help the group reach common ground.

16. Is it appropriate for a congregation to promote morality? What is the social work role in such a context?

It is in the nature of congregations to promote morality, in the broad sense of the term. The only real question is about which moral values to promote. Among other things, the social worker as member in a congregational context may help the group to identify, articulate, reflect on, choose, prioritize, and act upon these moral values. The social worker as leader in a congregational context will assume greater responsibility for such activities. In either case, it will be important for the social worker—as either member or leader—to decide whether and to what extent he or she can support congregational values.

17. As the committee worked to craft a mission statement, they encountered differing preferences for independence or interdependence and whether to promote singlehood or marriage. What is the significance of a mission statement? How can the group benefit from crafting a mission statement?

Because the mission statement will guide development of the program, it's important for the committee to reach agreement on these issues. As they do so, Randy should consider whether the committee's disagreements reflect significantly different preferences, different terminology, or both. For example, these lay people may not use the language of interdependence, although they appreciate it in their own lives and in the congregation.

Their disagreement exposes a broader issue. Any program will inevitably promote some things over others. That is not unique to this congregationally-based ministry. Randy's discomfort with promoting marriage may stem from his awareness of the moral issue lurking beneath the surface of the committee's discussion. The committee will do well to address this explicitly and deliberately. But they cannot avoid promoting or discouraging marriage. Program policies and procedures will inevitably have this effect, whether intended or not. Making an explicit decision and then informing prospective clients of it seems like one way to avoid the type of harm Randy fears.

18. Why does Randy appear uncomfortable with the effort to promote marriage at Grace House?

Randy's discomfort may stem from social work values and ethics that appropriately restrain a professional's efforts to impose their own preferences upon their clients. As noted above, any program will operationalize values of one kind or another. Furthermore, it seems reasonable that a group of volunteers and donors, such as this congregation, can design a program in accord with their own values. Randy must decide whether these violate his personal and professional values. As a member of the congregation, he has significant opportunity to participate in this decision.

### **Reflection**

19. If you were to assemble a task force at your congregation to address a social issue, who would you need to include? Explain.
20. Randy knew that asking the women to join the committee would add a new dynamic to the group, and this was important to him for professional reasons. What are some of the challenges you have in working with groups that have a variety of perspectives? Have these challenges proved to produce better outcomes? If you had the choice, would you choose a group with more or less diversity?
21. If you were a member of this task force, what recommendations would you make to the Session? Why or why not?
22. Would you accept a position as a social worker in a church where women were not allowed to fill other leadership positions in the church? Why or why not?
23. Randy has already invested a lot of his own time seeing people at the church and participating on the committee. At what point could his service to the church be detrimental to his clients at the mental health center?
24. As a social worker, how do you think you would balance your time between work obligations and volunteer opportunities? Do you see this as a challenge for you? How will you try to create balance between your professional and personal life?

### **Teaching Suggestions**

To deepen and enhance the in-class discussion, an instructor may draw upon the following supplemental activities.

1. Force Field Analysis (FFA): At the beginning of class or after starting the case discussion, take time to review the purpose and use of a force field analysis. Because authors suggest different frameworks for FFA (e.g., Kirst-Ashman & Hull, 2006; Brueggemann, 2005), choose one with which you feel comfortable. Next, instruct students to conduct an FFA to identify potential driving and restraining forces the committee should consider to successfully design and implement the Grace House Ministry. Divide

the class into two groups. Have the first group focus their FFA on people the committee needs to consider, and have the second group focus on all the other factors such as space, financing, time, and need. After students have had enough time to develop their FFAs in the small group, reconvene the class. Ask each group to select someone to summarize and report their FFA. As students are speaking, the instructor should list the people and other factors on the board along with the relative strengths. After both FFAs are on the board, facilitate a discussion about whether or not the students think the Grace House Ministry will become a reality.

2. Another option (also useful as a follow-up assignment) is to ask students to identify on a scale from 1 to 5 how likely the ministry will become a reality. Then give them 8 minutes to justify their answer in writing. When students are finished writing, facilitate a discussion of their responses. Instructors may also decide to share their own assessment; however, we suggest waiting until the end of the class.
3. Strengths, Weaknesses, Opportunities, and Threats Analysis (SWOT): Whereas the FFA exercise focused on designing and implementing the Grace House Ministry, this exercise helps students assess the proposal that the committee plans to give to the Session. At the beginning of class, provide an overview discussion of the purpose of strategic planning and introduce SWOT analysis as a useful way to assess the feasibility of the plan (e.g., CPS Human Resource Services, 2007; DCSE, n. d. ; Marketing Teacher, 2010; USDHHS, 2005). Next, write the four terms on the board—strengths, weaknesses, opportunities, and threats—and invite students to identify factors in each category. Next, divide students into small groups and assign each group a major weakness or threat. Then ask them to brainstorm ways that the committee could address the weaknesses or neutralize the threat. After the groups reconvene, invite students to share their ideas.
4. To take the SWOT assignment a step further, ask students to think of a social program they would like to develop in their field agency or congregation. In writing, have them list the factors in each category. Then ask them to think of at least one way to address each of the weaknesses or neutralize the threats that could hamper their idea. At the next class, have students share their papers.

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

#### *Print*

Brueggemann, W. E. (2005). *The practice of macro social work* (3<sup>rd</sup> ed.). Belmont, CA: Thomson.

Cnaan, R. A., & Boddie, S. C. (2002). Charitable choice and faith-based welfare: A call for social work. *Social Work, 47*(3), 224-235.

- Chaves, M., & Tsitsos, W. (2001). Congregations and social services: What they do, how they do it, and with whom. *Nonprofit and Voluntary Sector Quarterly* 30(4), 600-683.
- Dudley, C. S. (1991). *Basic steps toward community ministry*. Herndon, VA: Alban Institute.
- Dudley, C. S. (1998). *Next steps in community ministry: Hands-on leadership*. Herndon, VA: Alban Institute.
- Dudley, C. S. (2002). *Community ministry: New challenges, proven steps to faith-based initiatives*. Herndon, VA: Alban Institute.
- Garland, D. R., Myers, D. R., & Wolfer, T. A. (2008) Social work with religious volunteers: Activating and sustaining community involvement. *Social Work*, 53(3), 255-265.
- Hopkins, B. R. (2004). *Starting and managing a nonprofit organization: A legal guide* (4<sup>th</sup> ed.). San Francisco, CA: Jossey-Bass. [Translates the intricacies of nonprofit law for non-lawyer managers of nonprofits.]
- Johnson, M. M., & Rhodes, R. M. (2004). *Human behavior and the larger social environment*. Boston: Pearson.
- Kirst-Ashman, K. K., & Hull, G. H. (2006). *Generalist practice with organizations and communities* (3<sup>rd</sup> ed.). Belmont, CA: Thompson.
- Rans, S., & Altman, H. (2002). *Asset-based strategies for faith communities*. Evanston, IL: ABCD Institute.
- Skjedstad, J. (2002). *Starting a non-profit at your church*. Herndon, VA: Alban Institute.  
[Replete with checklists and charts, this book will help any congregation decide whether to start a nonprofit and how to do it well.]
- Skjedstad, J. (2007). *Winning grants to strengthen your ministry*. Herndon, VA: Alban Institute.
- Wolfer, T. A., & Sherr, M. E. (2003). American congregations and their social programs. In T. Tirrito & T. Casio (Eds.), *Religious organizations in community services* (pp. 23-50). New York: Springer.

### **Electronic**

- Corporation for National and Community Service. (n.d.). *Resources for community-based organizations*. Retrieved August 3, 2010, from <http://www.nationalserviceresources.org/resources-specific-groups/community-based-organizations>  
[This website provides a variety of resources for partnerships between faith-based and other organizations.]
- CPS Human Resource Services. (2007). *Workforce Planning Tool Kit: Environmental scan and SWOT analysis*. Washington, DC: Author. Retrieved July 23, 2010, from <http://portal.cornerstones4kids.org/content135.html>

- Department for Children, Schools, and Families [DCSF], Teachernet. (n. d.). *Undertaking SWOT analysis*. Retrieved July 24, 2010, from <http://www.teachernet.gov.uk/professionaldevelopment/tipd/guidance/swot/>
- Fernandez, L. M. (1997). Running an effective task group: The five C's. *The New Social Worker: The Magazine for Social Work Students*, 4(1). Retrieved July 24, 2010, from <http://www.socialworker.com/task.htm>
- Kretzmann, J. P., McKnight, J. L., Dobrowolski, S., & Puntenney, D. (2005). *Discovering community power: A guide to mobilizing local assets and your organization's capacity*. Evanston, IL: ABCD Institute. Retrieved July 24, 2010, from <http://www.abcdinstitute.org/docs/kelloggabcd.pdf>
- Marketing Teacher. (2010). *SWOT analysis*. Retrieved July 24, 2010, from <http://www.marketingteacher.com/lesson-store/lesson-swot.html>
- Rans, S. A. (2005). *Hidden treasures: Building community connections by engaging the gifts of people on welfare, people with disabilities, people with mental illness, older adults, young people*. Evanston, IL: ABCD Institute. Retrieved July 24, 2010, from [http://www.nationalserviceresources.org/files/legacy/filemanager/download/community\\_development/hiddentreasures.pdf](http://www.nationalserviceresources.org/files/legacy/filemanager/download/community_development/hiddentreasures.pdf)  
[This workbook and many other resources are available on the Asset Based Community Development Institute web site: <http://www.abcdinstitute.org/>]
- U. S. Department of Health and Human Services [USDHHS], Substance Abuse and Mental Health Services Administration, Center for Substance Abuse Treatment. (2005). Assess your organization's strengths and needs (Chapter 1). *Maximizing program services through private sector partnerships and relationships: A guide for faith- and community-based service providers* (pp. 3-8). Rockville, MD: National Clearinghouse for Alcohol and Drug Information. Retrieved July 24, 2010, from [http://www.samhsa.gov/fbci/docs/PartnerHandbook\\_feb2006.doc](http://www.samhsa.gov/fbci/docs/PartnerHandbook_feb2006.doc)  
[Available free on-line, a comprehensive manual for developing programs and partnerships.]



## **The Letter: Teaching Notes**

*Mackenzi Huyser and Maggie Wiles*

### **Case Synopsis**

While working as a Family Advocate at My Sister's Place, a Christian domestic violence agency, Carrie Peterson, BSW, received a referral from a County health nurse for a new client named Siu Lee. As a refugee from Vietnam, she had experienced trauma and severe conditions in a refugee camp. Siu sought assistance because of an abusive husband but declined shelter services in group housing because of her experience in a refugee camp. As an alternative, Carrie provided counseling services for Siu and eventually arranged for her to be placed in a transitional housing program. In order for Siu to enter the program, however, the program director, Samantha Carter, acting in compliance with federal requirements required a letter from Carrie certifying that Siu was homeless, even though she was currently living with her husband.

### **Intended Case Use**

Written for a bachelor's level capstone or integrative seminar, the case may also be useful for practice courses that focus on micro or macro practice. It may also be useful for specialized instruction on concepts related to social systems and working with survivors of domestic violence. This case may also be relevant for foundation level MSW courses on these topics.

### **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all of even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a context or to anticipate learning outcomes that they may seek in an integrative course.

Depending on the course and focus of the discussion, students will learn or learn to:

1. Recognize the cycle of domestic violence and barriers to breaking this cycle.
2. Articulate professional ethical standards evident in the area of domestic violence.
3. Apply knowledge of crisis intervention skills with a client experiencing domestic violence.
4. Identify client individual and environmental strengths and how strengths are built upon in the interview and intervention process.

5. Identify interventions on a variety of human system levels.
6. Apply knowledge of cultural competence skills with a client experiencing domestic violence.
7. Recognize temptations and pressures to alter, conceal, or fabricate information in order to obtain essential services for vulnerable clients, and identify personal and professional ethics that apply in such situations.
8. Understand the concept of “situational ethics” and the commonly-cited justifications for it and decide about its place in one’s own ethical code.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students’ familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as “right answers” so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional “use of self.”

#### **Facts**

1. What background, experiences, and knowledge did Carrie bring to this case? What type of social worker was Carrie?

Carrie was a social worker at My Sister’s Place located in the Chicagoland area. She was a recent graduate of a small Christian college where she earned her Bachelor of Social Work degree. Her previous work experience included work as an intern in the field of domestic violence. This experience led her to find full-time employment in a faith-based domestic violence agency where she was involved in case management services, referral for additional services, and client advocacy. Carrie was a Christian and believed that it was through God’s grace and the death of his son Jesus Christ that she had been forgiven and redeemed. She also believed that she was called to be a part of transforming the world to bring glory to God. She viewed her role as a social worker at the agency as part of her calling to restore God’s creation.

Having “grown up in a Christian community where no one hung out their dirty laundry and no one discussed violence in the home,” she found many client problems challenging and at times awkward. Nevertheless, “the look of confidence a woman had after she had started anew and was empowered to live a life free of abuse” motivated Carrie’s work with her clients.

2. What background information do we have about Siu Lee and the nature of her situation?

Siu Lee was a refugee from Vietnam and a married mother of two young boys. Siu was very emotional as she told Carrie her story of abuse by her husband. Siu Lee and her husband had just married when he told her he wanted to escape the horrible conditions in Vietnam since the end of the war and move to live with his family in the United States. Siu Lee left her own family who remained living in Vietnam.

Siu and her husband embarked on a long journey to reach the United States which included traveling to the Philippines and living in a refugee camp there. Finally, in 2005, Siu and her husband were granted entry into the United States to live near Mr. Lee's family.

Siu Lee reported that when she and her husband arrived in the United States he began to "turn crazy." She described years of isolation enforced by her husband and how he destroyed some of her most precious mementos from Vietnam.

Mr. Lee owned a supermarket with his brothers. Siu reported that he was always working, up to six days a week. While he was away he forced her to live in complete isolation, refusing to allow her to leave the home except for scheduled appointments with the health nurse to get medicine for their son, Lanh, who suffered from chronic ear infections.

3. What information do we have about Siu Lee's cultural and religious background?

Siu lived in fear of her husband and also felt a tremendous amount of shame for what she called a "bad marriage" In Siu's culture there was great emphasis on honoring and not bringing shame to one's family (Gill, 2004; Fong, 1994). Siu was reluctant to speak out about what was happening in her home because she feared dishonoring her husband and family. Rather than speaking out, she kept her concerns and worries to herself. According to Wikan, "women carry great influence in determining the reputation of the family... [w]omen have both negative power (that is, they can tarnish the family honour through their behaviours) and positive power" (as cited in Gill, 2004, p. 475). Because of this, women in Siu's culture often felt much pressure to withstand relational difficulties in order to preserve family harmony (Gill, 2004). Siu's fear of bringing shame upon the family had silenced her for many years.

We also know that often in Asian cultures women will go to other family members, including extended family, for help before seeking help from outsiders. In Siu's case, her family was not available as a source of support. This may have influenced her willingness, or need, to go outside the family for help (Fong, 1994).

Finally, Siu's faith background as a Buddhist, caused her to believe in karma, that whatever you do intentionally to others will happen to you in the future. It was therefore her belief that the hardships she was experiencing in her life came from something she had done and, thus, she deserved it and must live with it.

4. What information do we have about My Sister's Place and their commitment to work with women of faith?

My Sister's Place was a faith-based domestic violence organization in the Chicagoland area. They offered counseling services and a shelter especially for "women of faith" who were dealing with abusive situations. Although it was a

Christian organization, My Sister's Place served women of all faiths. Individual donors from the Christian faith, and Christian organizations and churches funded the organization.

Most of the women served by the organization came from Christian faith backgrounds; however, the organization had a long history of serving women of other faiths, and staff members were encouraged to attend trainings on different cultural and religious traditions. Indeed, Carrie and other staff members had recently attended training on domestic violence and its relation to different cultural and religious beliefs. Carrie has been told that historically, domestic violence has been accepted and legitimized within Asian cultures. Southeast Asian communities and families are often patriarchal and conservative in their view of gender roles. This culture highly values honoring one's family. Because women have a large role in determining the reputation of their family, they are taught to honor their family at any cost, even if this includes silently suffering domestic violence. In this culture a woman should be unconditionally devoted to her husband, even if he is abusing her. Buddhism, the most popular religion of Southeast Asians, promotes the idea of karma. Karma is the philosophy that your current actions will determine your fate. However one intentionally treats others will determine how one is treated by others in the future. Hardships, like domestic violence, are often viewed as the result of one's past actions, and therefore seen as deserved.

She also had been told that intimate partner violence is highly prevalent within Southeast Asian communities living abroad. Among these communities, alcohol and drug use, gambling, mental illness, stress and frustration are factors which people use to explain intimate partner violence. Gender, class, age, culture, and immigration status can impact an abused Southeast Asian woman's feelings of ability to do something about her situation, her attitude toward partner violence, and her ability to protect herself and her family. Frequently, Southeast Asian women in America live in isolation and alienation from the outside world often due to language and cultural barriers. These barriers can keep women involved in partner violence from finding out what their options might be.

Finally, Carrie had been told that if and when South Asian women seek support for their struggles with domestic violence, it is often informal support from friends and family. The women are often wary of and uncomfortable with formal, outside support from agencies. Among Southeast Asian communities, attitudes exist against calling the police or separating from one's abusive partner. Carrie learned that when helping women from this culture, a central concept should be that every woman has the right to assume control over her own life and the philosophy should be one of empowerment.

### *Analysis*

5. What were the housing services and options Carrie presents to Siu? What were some of the pros and cons of these services for Siu based on the strengths she demonstrated?

Carrie presented three options to Siu: counseling; temporary housing at a shelter; and placement in a transitional housing program. Any combination of these options may commonly be offered to survivors of domestic violence.

Counseling services offered survivors of domestic violence a safe place to receive emotional support during a difficult time. A counselor could help support the survivor by empathizing with them and offering a chance for respite and relief from the situation (Kirst-Ashman & Hull, 2009, p. 467). Shelters filled the need for immediate housing for women who have been abused (Kirst-Ashman

& Hull, 2009, p. 466). Temporary housing in a shelter could provide survivors a safe place to stay, but shelters may also have been chaotic environments that may have required a difficult adjustment for someone like Siu who had past emotional trauma from her experience as a refugee. A transitional housing program offered a supportive transition into independent living and housing for survivors of domestic violence. For many survivors of domestic violence, this time of transition was needed to gain skills and confidence for living without their partner.

Siu, in contrast to other survivors of domestic violence, was in a unique situation as an international refugee. She was living in a country apart from her family and broader social network among people who did not share her language and cultural norms. She also had experienced severe trauma from her time living in a refugee camp. Nevertheless, her strengths included resilience, courage, and a desire to make a better life for her children. Siu endured living as a refugee and being homeless as she traveled to the United States. Siu survived this experience, but because of it was unable to consider moving into a shelter. For this reason, the temporary shelter option was not an option for Siu. Siu also demonstrated a great deal of courage, bypassing her husband to visit with Carrie in order to live a better life. This courage allowed her to not only visit with Carrie, but also take the steps necessary to commit to moving into a transitional housing program.

6. What type of abuse was Siu experiencing?

Siu was experiencing emotional and verbal abuse. Her husband had kept her isolated from the outside world by not allowing her to leave their home. He was emotionally abusive by destroying her possessions, which were treasured items from her past in Vietnam.

7. What cultural factors may have affected Siu's reaction to the domestic violence?

Siu's cultural background played a large role in her reaction to domestic violence. She was ashamed of the failed relationship. "As wife, I have bad marriage" and "my family suffer, my life, I despair. I have shame for this" she remarked. This response is consistent with Gill's (2004) research on the impact of culture on Southeast Asian women experiencing domestic violence: "Fear of bringing shame on the family routinely acts to silence women about their experiences of violence and discourages them from resisting such coercive control" (p. 476). This would explain why Siu had endured her husband's abusive behavior for many years before speaking out.

Another cultural factor may have been her inability to use her native language to define and explain what was happening to her. According to Gill (2004), "Uncovering meaning through language, for those women who were raised speaking their respective mother tongues, entails using the words of the majority culture for terms such as domestic violence" (p. 470). It is possible that in Siu's case, due to her limited knowledge of the English language, that she had no words to describe her situation. Particularly because her husband had forced her into isolation, Siu had little contact with the outside world and perhaps little exposure to this concept outside of her home.

It is also possible that Siu viewed her husband's abuse as deserved, or believed that he did not realize that what he was doing was wrong. In her culture, abusive behavior was sometimes seen "as being culturally sanctioned or as insignificant. Such sentiments point to a subculture of tolerance of violence

against women on the part of some Asian men" (Gill, 2004, p. 473).

In addition, Siu's reaction to domestic violence and how she was able to deal with it may also have stemmed from her past experiences. Through her experience of escaping Vietnam as a refugee she remembered being homeless, starved, and ill, and this past trauma influenced her refusal to accept a shelter stay.

8. How did Carrie's experience influence her response to Siu Lee? How did Carrie's view of domestic violence impact how she would help Siu?

Carrie had worked in the field of domestic violence for a short time prior to her work with Siu. Carrie also disclosed in the case being challenged as she dealt with issues of faith and domestic violence. In addition, Carrie disclosed that she had (prior to her field placement) "limited interaction with people having worldviews different than her own." She also frequently questioned "how someone could find strength and hope in these different perspectives when to her they seemed so inadequate."

These experiences and the view Carrie expressed may have had an impact on how she approached working with Siu. She may have been challenged as she tried to understand Siu's feelings of strength as well as feelings of shame stemming from her faith background. In addition, Carrie stated her job satisfaction came from "the 'look of confidence' a woman had after she had 'started anew' and was empowered to live a life free of abuse." She would probably have been inclined to watch carefully for that "look of confidence", and judge her own performance based on whether or not she found it.

9. How does Siu's faith background impact her reaction to the domestic violence?

In this case we learned that Siu was raised in Vietnam and as a Buddhist. Buddhism includes the idea of "good and bad karma" (what happens to you is based on your past actions). Siu believed that these hardships were the result of bad karma. She also believed that her life experience stemmed from some past action and that she must accept her current life situation. Siu believed that her husband's abuse must have been the result of her own past actions and was therefore deserved. She felt a strong desire to continue to honor her husband and her family, and this made it very difficult for her to comprehend leaving him.

10. How does faith influence Carrie's work with Siu Lee as a person of another faith?

Carrie's faith background stemmed from a Christian theology. She believed her sins have been forgiven through the death of God's son Jesus Christ. She also believed that she was called to be a part of transforming the world to bring glory to God. She viewed her role as a social worker at the agency as part of her calling to restore God's creation. She believed that God must be in the center of human relationships.

Growing up in a "Christian community where no one hung out their dirty laundry and no one discussed violence in the home" affected her role as a social worker at a domestic violence agency. At first, she felt awkward dealing with issues of faith and domestic violence. Despite this, Carrie felt called to help those who were suffering from domestic violence. She did not believe in the concept of karma, either good or bad, but believed in the grace of God. Carrie believed that women experiencing domestic violence were deserving of and in need of

God's grace and love. She also believed that every woman deserved to know that they were loved unconditionally. Her love for these battered women gave her a passion to empower them to seek better situations for themselves and their families.

11. When it comes to issues of domestic violence, what role should social workers play according to the NASW Code of Ethics to adequately protect people and advocate for services?

The NASW Code of Ethics focuses on a number of values, ethical principles, and ethical standards, which dictate the role a social worker should play in working with at-risk/special populations. The values and ethical principles emphasized in this case may include: **service**, social workers' primary goal is to help people in need and to address social problems; **social justice**, social workers challenge social injustice; **dignity and worth of the person**, social workers respect the inherent dignity and worth of the person; **importance of human relationships**, social workers recognize the central importance of human relationships; **integrity**, social workers behave in a trustworthy manner; **competence**, social workers practice within their areas of competence and develop and enhance their professional expertise.

Additional Code of Ethics standards that need to be considered may include the following:

**1.01 Commitment to Clients-** "Social workers' primary responsibility is to promote the well-being of clients. In general, clients' interests are primary. However, social workers' responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients, and clients should be so advised."

**1.05 Cultural Competence and Social Diversity-** "Social workers should have a knowledge base of their clients' cultures and be able to demonstrate competence in the provision of services that are sensitive to clients' cultures and to differences among people and cultural groups."

**4.04 Dishonesty, Fraud, and Deception-** "Social workers should not participate in, condone, or be associated with dishonesty, fraud, or deception."

12. What did it mean for Carrie to practice with integrity, both as a social worker and as a Christian, in this situation?

Social work practice is riddled with ethical conflicts and issues. Near the end of this case, Carrie is faced with a tough ethical decision. In order for Siu to gain entry into the transitional housing program, she must have a letter from Carrie's agency indicating that Siu has homeless status. Thus far, Siu has refused to leave her husband and enter a shelter because of her past experiences as a refugee from Vietnam. Therefore, Siu is not homeless.

If Carrie were to write a letter stating that Siu was homeless, she would be acting dishonestly. Integrity is an important concept both in social work and Christianity. Social workers are required by the Code of Ethics to "behave in a trustworthy manner," and "act honestly and responsibly and promote ethical practices on the part of the organizations with which they are affiliated." It is quite possible that Carrie's agency has policies regarding acting with honesty and integrity. Of course, Christianity also values acting with honesty and integrity.

## Action

13. What should Carrie do to ensure she is practicing skills that are culturally competent?

The NASW Code of Ethics states the following about social workers and their commitment to cultural competence and social diversity: "Social workers should understand culture and its function in human behavior and society, recognizing the strengths that exist in all cultures; social workers should have a knowledge base about their clients' cultures and be able to demonstrate competence in the provision of services that are sensitive to clients' cultures and to differences among people and cultural groups; social workers should obtain education about and seek to understand the nature of social diversity and oppression with respect to race, ethnicity, national origin, color, sex, sexual orientation, age, marital status, political belief, religion, and mental or physical disability" (Standard 1.05 a-c).

In this specific case, Carrie needs to be aware of both how Siu's cultural and religious beliefs are part of who she is and how these will affect her response to Carrie. For this reason Carrie should begin by researching and informing herself about Siu's cultural and religious background. She might specifically research and consider the role that domestic violence has played in this culture in the past. In the case it mentions that Carrie would review some notes she had from a training on domestic violence in relation to Southeast Asian cultures and religions.

It might also be important for Carrie to consult with a supervisor in this case. According to the NASW Code of Ethics, Standard 2.05a "Social workers should seek the advice and counsel of colleagues whenever such consultation is in the best interests of clients." Because this case is unlike other cases Carrie has experienced before, it will be important for her to debrief and receive feedback from a supervisor to be sure that she is practicing in an ethical and culturally competent manner with Siu in the future.

Carrie will need to be very sensitive when working with Siu. Though it might seem obvious to Carrie that this is not a healthy marriage and that it is in Siu's best interest to get out, Carrie needs to take into consideration what other cultural values and norms come into play in Siu's situation. Though Siu may view what her husband is doing as wrong, she might still have a lot of respect for him as the head of the household, as the father of her children, and as the sole provider for her in the United States. Carrie will need to keep this in mind and not be judgemental about Siu's beliefs.

Carrie should also be careful about what she asks and how she questions Siu. She should take time to develop a rapport and relationship with Siu, assessing Siu's level of comfort and then questioning her appropriately.

Carrie will want to help Siu to identify her cultural, religious, and personal strengths. This will serve to increase Siu's self-esteem while also showing respect for her background.

14. What options does Carrie have to assist her client Siu Lee? What are the potential risks and consequences of these options for Siu Lee and her family?

Carrie needs to document through a letter from My Sister's Place that Siu is homeless. Carrie does have the option of simply writing a letter indicating she is homeless. This is, however, not true and if Carrie did this she would not only put herself and her agency at risk, she could put Siu and her family at risk for acceptance and/or continuation in the transitional housing program.



A second option for Carrie is to push harder for Siu to spend at least one night in a shelter so Carrie can write the letter with integrity. The program director indicated it did not matter how many nights Siu stayed in the shelter, she just needed to be in a shelter program and therefore obtain homeless status. From this statement, simply staying in a shelter for one night would be enough for Carrie to write the letter and to qualify Siu for the program. One approach Carrie might take is to take Siu Lee to visit one of the shelters so she can see what the temporary housing conditions are like. The risks and consequences of this action could potentially have an impact on the relationship Carrie has with Siu Lee as it could be considered coercive or violates a feeling of empowerment that Carrie, as a social worker, works to instill in her clients.

Third, it might be possible for Carrie to arrange an overnight stay at a local motel with payment by My Sister's Place. This could avoid the complications of a shelter stay and require minimal expense. If her agency cannot make this payment, it may be possible for Carrie to solicit funds elsewhere to assist Siu Lee.

15. What are the potential risks and consequences of these options for Carrie? For My Sister's Place?

Every action of a front-line worker has an impact on his or her organization. Carrie is in the middle of a difficult decision because she is concerned for the well being of her client, Siu, and her safety, but does not know if this concern permits her to write a letter that is not true.

Carrie has spoken with Siu about this transitional housing program, and Siu has agreed that this program is a good option for her and her family. Siu may begin to question Carrie and her intentions if she is not able to enter this program. She may also question Carrie's honesty and begin to question if she should trust Carrie. In addition, Siu and her children are in a dangerous situation living at home with Mr. Lee. If they must continue to remain at home while new options for housing are considered, their lives may be at risk.

If Carrie decides to write the letter, the organization's reputation would be on the line if Carrie's letter became public. This could have an impact on funding, both from government sources and churches that would not want to be associated with this type of behavior. A systematic view of the situation would also show an impact on the transitional housing program. This housing program could be in jeopardy for receiving their federal funding.

### *Reflection*

16. What personal beliefs and commitments do you have about truth telling? Are these primarily professional or religious?
17. What personal beliefs do you have about domestic violence? How would these beliefs impact how you are able to work with clients who are survivors of domestic violence?
18. How difficult would it be for you to work with a Buddhist client? What role/responsibility, if any, does a Christian in social work have for representing the Christian faith to a Buddhist client?

## Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Have students divide into small groups and discuss Carrie's dilemma. What are the pros and cons of writing the letter? What are the pros and cons of not writing the letter?
2. According to Lum (2003), "cultural competence involves the areas of cultural awareness, knowledge acquisition, skill development, and continuous inductive learning" (p. 7). Based on this definition, how would you approach Siu Lee as a client? What specific questions might you ask her? What resources would you examine? Who might you talk to before meeting her?
3. Many faith traditions have varying responses to situations of domestic violence. Explore your own faith tradition and two additional faith traditions to see what their response is to domestic violence. You might interview a few pastors or church leaders or speak to a church social work department or counseling center. Explore as a class what a biblically based response to domestic violence is. What role should the church play in this response? What barriers might a social worker encounter trying to encourage the church to play an active role in response to domestic violence?
4. In advance of the case discussion, assign students a reading on Southeast Asian cultural issues in domestic violence (e.g., Gill, 2004). Use this reading to make comparisons to Siu's situation and highlight differences in her experience from other women's experiences. More specifically, you could use this reading to discuss the concept of shame and importance of honoring her family that Siu Lee talks about in this case.
5. In this case, Carrie is able to refer Siu Lee to a combination of three possible services (counseling, a temporary shelter program, and a transitional housing program). What services are available in your community for survivors of domestic violence? Are any of these services faith-based?
6. Simulate a case discussion between organization staff (direct staff, supervisors, agency director) who all could be possibly involved in this case and discuss the ethical implications for writing the letter so Siu Lee can be placed in the transitional housing program.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### **Print**

- Abraham, M. (2000). Isolation as a form of marital violence: The South Asian immigrant experience. *Journal of Social Distress and the Homeless*, 9(3), 221-236.
- Ahmad, F., Riaz, S., Barata, P., & Stewart, D. E. (2004). Patriarchal beliefs and perceptions of abuse among South Asian immigrant women. *Violence Against Women*, 10(3), 262-282.
- Brewster, M. P. (2002). Domestic violence theories, research, and practice implications. In A. R. Roberts (Ed.), *Handbook of domestic violence intervention strategies: Policies, programs, and legal remedies* (pp. 23-48). New York: Oxford University Press.
- Fong, R. (1994). Family preservation: Making it work for Asians. *Child Welfare Journal*, 73(4), 331-341.
- Gill, A. (2004) Voicing the silent fear: South Asian women's experiences of domestic violence. *Howard Journal of Criminal Justice*, 43(5), 465-483.
- Kirst-Ashman, K. K., & Hull, H. H., Jr. (2009). *Understanding generalist practice* (5<sup>th</sup> ed.). Belmont, CA: Brooks/Cole.
- Lum, D. (Ed.). (2003). *Culturally competent practice: A framework for understanding diverse groups and justice issues* (2<sup>nd</sup> ed.). Pacific Grove, CA: Brooks/Cole.
- McQuaide, S. (1989). Working with Southeast Asian refugees. *Clinical Social Work Journal*, 17(2), 165-176.
- National Association of Social Workers. (1999). *Code of ethics*. Washington, DC: Author.
- Preisser, A. B. (1999). Domestic violence in South Asian communities in America: Advocacy and intervention. *Violence Against Women*, 5(6), 684-699.
- Taft, A. L., Small, R., & Hoang, K. A. (2008). Intimate partner violence in Vietnam and among Vietnamese diaspora communities in western societies: A comprehensive review. *Journal of Family Studies*, 14(2/3), 167-182.

### **Electronic**

- Anitha, S., Chopra, P., Farouk, W., Haq, Q., & Khan, S. (2008). Forgotten women: Domestic violence, poverty, and South Asian women with no recourse to public funds. Retrieved July 20, 2010, from <http://saheli.org.uk/sites/default/files/Forgotten%20Women.pdf>
- Dasgupta, S. (2000). Charting the course: An overview of domestic violence in the South Asian community in the United States. *Journal of Social Distress and the Homeless*, 9(3), 173-185. Retrieved July 20, 2010, from <http://www.springerlink.com/content/r738843078366h11/fulltext.pdf>
- Goel, R. (2005). Sita's trousseau: Restorative justice, domestic violence, and South Asian culture. *Violence Against Women*, 11(5), 639-665. Retrieved July 20, 2010, from <http://vaw.sagepub.com/content/11/5/639.full.pdf+html>

Raj, A., & Silverman, J. (2002) Intimate partner violence against South Asian women in Greater Boston. *Journal of the American Medical Women's Association*, 57(2), 111-114. Retrieved July 20, 2010, from <http://www.ncbi.nlm.nih.gov/pubmed/11991419>

Ruksana, A. (2000). Domestic violence in the South Asian Muslim immigrant population in the United States. *Journal of Social Distress and the Homeless*, 9(3), 237-248. Retrieved July 20, 2010, from <http://www.springerlink.com/content/mt681701460723w7/fulltext.pdf>

South Asian, The. (2004). *Domestic violence- the unreported epidemic*. Retrieved October 22, 2009, from [http://www.thesouthasian.org/archives/2004/domestic\\_violence\\_the\\_unreport.html](http://www.thesouthasian.org/archives/2004/domestic_violence_the_unreport.html)

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# Gone Huntin': Teaching Notes

*Sandy L. Bauer and Leslie S. Gregory*

## Case Synopsis

Laura Adams, a social worker with Family Counseling Services, met with the Roberts couple concerning their inability to resolve conflicts and keep connected with one another. This ongoing struggle became more intense around hunting season, when Roger spent weekends away and Connie felt he was not as available to her as she needed him to be. Subsequent sessions revealed a pattern of difficulty with maintaining a close relationship. Past incidents of hurts from early in the marriage were frequently raised. Laura identified Connie's faith as a source of support for her, yet Roger did not share this. Laura struggled with the role of faith and finding common ground in her work with this couple.

## Intended Case Use

Written for advanced MSW-level courses in practice with individuals and families, the case may also be used for specialized instruction on religion/spirituality in social work practice, practice issues in working with couples, worker struggles with the impact of faith on practice, or more generally for instruction on social work direct practice.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Understand how to build and maintain relationships with people in conflict (i.e. couples) without alienating or over-identifying with either party.
2. Analyze the closeness/distance dynamic in marriage in different stages of family development.
3. Evaluate the emotional impasse created by the lack of forgiveness in relationships and the potential role of forgiveness in healing.
4. How to discuss sexual and other sensitive or taboo issues with clients.
5. Identify the strengths of individuals and couples who are in conflict.

6. Recognize and distinguish one's own perspectives, needs, interests and purposes from those of clients.
7. Understand faith issues in families based on their history, memberships, and/or identifications.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize. For particular purposes, they may need to develop their own additional discussion questions. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts - to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What brought this couple to the agency?

Hunting season had just ended and Roger and Connie found themselves in conflict with each other over the amount of time Roger was away hunting. Connie was left feeling lonely and forgotten by Roger during hunting season. Roger, on the other hand, didn't want Connie to "mess" with his time away. The dynamics of hunting season reflected the ongoing unmet needs that had occurred during the Roberts' eight years of marriage. The Roberts selected FCS because their insurance company had referred them and FCS accepted their insurance. The FCS office was located close to their home.

2. What was Laura Adams' role and purpose in this case?

Laura was a newly hired clinical social worker at FCS, a large group counseling practice. She was assigned the Roberts case from FCS's intake department. The Roberts were referred to FCS through Connie's insurance company. Following an initial assessment that Laura completed during the first few sessions, Laura provided general counseling services. Laura functioned as a mediator to help the Roberts overcome the obstacles impacting their relationship by establishing a tentative, time-limited (usually driven by the number of sessions that insurance would allow) working contract with the couple.

3. How do insurance payments influence treatment?

Mental health services provided through health insurance often have a specific number of sessions allotted within each calendar year. This can certainly influence the length of time a social worker has to work with the family and may force the social worker and family to discontinue services too soon if there is an

insufficient number of sessions or to stretch out services to make the sessions span a longer period of time, leaving gaps of time between sessions. The burden of high co-payments, which may be as high as \$40 per session, is another obstacle to providing on-going and consistent treatment for clients who cannot afford to spend \$160 per month to receive weekly mental health services.

In this case, Connie had insurance and was charged a nominal \$10 co-payment with 30-visits allowed per calendar year, which is at the upper end of what insurance companies provide. Because of the low co-payment fee, high number of visits allowed, and the Roberts' comfortable financial situation, the Roberts would have been able to receive services throughout the year, if necessary.

4. [If students have been assigned a reading on stages in family or marital development:] What was the couple's stage of family (or marital) development?

Connie and Roger were married for eight years when Laura first met them. It appeared that the couple was moving to a middle stage of marriage based on their increased focus on core relationship issues. During this stage the focus is often on relational issues and problem-solving abilities. The Roberts needed to enhance their problem-solving and conflict skills.

Themes from an earlier stage that involve boundaries, intimacy and communication may also be apparent (Constable & Lee, 2004). This was evidenced by their inability to meet one another's needs, as they struggled with intimacy and poor communication patterns.

5. What role did religion/spirituality/faith play in Connie and Roger's relationship?

Connie attended a local church and stated that it was important to her. She also talked about praying. Roger stated that he attended church on holidays. Roger perceived a conflict between some of Connie's behaviors such as cursing and her church attendance and prayer. Faith was another area where there was conflict rather than cohesion in the couple's relationship.

### *Analysis*

6. What were the triggers that brought the Roberts to counseling?

The presenting issue was the conflict over the time Roger spent hunting every season. He had this tradition for many years and did not want any interference with his time away. Connie disliked his lengthy absence during hunting season, both physically and emotionally. Their inability to resolve this conflict led to an exploration of other conflicts and relational dynamics including infertility, emotional and sexual intimacy, and communication patterns. Unresolved issues may continue to surface time and time again in the middle stage of marriage (Constable & Lee, 2004). Such impasses can bring couples to a social worker for help.

7. How did Laura help build the helping relationship?

During the initial session, Laura clarified her role and purpose to the clients. She described this as building trust in the relationship and helping to develop a sense of rapport and feeling of care. Establishing these three elements of the

helping relationship were intended to help the client(s) feel safe enough to share their feelings and concerns, invest in addressing their problems and overcome the presenting obstacles (Shulman, 2006).

8. What steps did Laura take to assess the Roberts' situation?

Since they began with their disagreement over hunting season, she explored sources of their conflicts. The beginning step of the helping process is assessment, when the social worker gathers information about the problem or the issues that the client presents. In this case, that also included information about their families of origin to further understand the family system. She also explored sources of strength, particularly through her discussion of what they enjoyed doing together.

9. What were the strengths of this couple?

They voluntarily came for help and consistently attended sessions and completed homework. Although they had difficulty communicating at times, they also expressed concern for one another and a desire to improve their relationship. They were both employed, with a comfortable lifestyle, and enjoyed a number of activities together. Working through a shared problem (e.g., infertility) and identifying coping abilities may bring a couple closer together (Watkins & Baldo, 2004).

10. How influential were Laura's beliefs in this case?

Laura came with a strong Christian background, yet did not come with expectations regarding how faith might play a role, particularly in the beginning stages, in a helping relationship with a couple who was not explicitly seeking Christian counseling. She did come with a bias that faith is a strength. It was also easier for her to connect with and relate to Connie's view on the role of faith in her life. Like Connie, Laura identified her faith as important to her. Roger didn't identify his faith as having the same importance as Connie had expressed about her own faith. Connie's church attendance and expressed desire to grow in her relationship with God were more similar to Laura's.

11. How did Laura raise issues of faith with the Roberts?

After identifying that feeling disconnected emotionally was part of the difficulty in not meeting each other's sexual needs, Laura attempted to find common ground in areas where they might feel united. She reintroduced the topic of the importance of church in their lives. By doing this she revealed her openness to consider issues regarding faith (Canda & Furman, 1999). Families provide a context for faith through the daily events, stories and experiences that take place. Although faith can be considered a strength, Laura also discovered that it could be a source of conflict. With the Roberts, the conflict related to the different views they had regarding their faith. Connie was more open to talking about her faith and exploring ways to draw upon this. On the other hand, Roger grew uncomfortable with these discussions and didn't see his faith as a resource for the marriage. He mostly saw it as a rote ritual that he had been taught.

12. How may the couple's struggles have related to their respective life histories?



Roger grew up in a home with traditional roles and little affection. Roger felt attracted to Connie because she was an excellent cook and homemaker, which reminded him of his mother. Neither Connie nor Roger had learned good communication styles from their families of origin. Roger, in keeping with what had been role modeled for him by his parents, struggled to demonstrate his affection for Connie, both verbally and physically. Connie, as role modeled by her mother, struggled with bitterness and anger toward Roger. These feelings projected onto Roger may have been displaced anger toward her mother. Connie had felt abandoned by her father and at times acted out the common pattern of rejecting a loved one (in this case Roger) before he could reject her.

13. How may the Roberts' infertility have contributed to their conflict and tensions?

If issues of loss and grief were unresolved from their past experiences, this may have been impacting their ability to emotionally connect with one another. Connie expressed anger and resentment toward Roger because his hunting had conflicted within vitro fertilization treatments. This, coupled with Roger not perceiving a need to seek Connie's forgiveness for his lack of care and support during the in vitro process, contributed to the tensions between Connie and Roger. Connie's continued need to talk about issues related to the infertility suggested that this was still an unresolved issue. Watkins and Baldo (2004) found that couples with infertility might experience an "emotional roller coaster" with extreme shifts in emotions that each partner may experience at different times. "Infertility can cause a tremendous amount of pressure on the couple's sexual intimacy" (Watkins & Baldo, 2004, p. 398).

14. How did the couple's conflict relate to their differing desires for intimacy?

The lack of resolution had led to an approach-avoidance pattern that impacted their communication. They vacillated between arguing and fighting with one another and avoiding confrontation and communication. The withholding of sex was one way that Connie kept Roger at a distance and let him know that her needs were not being met.

15. How did Laura address taboo issues?

Shulman (2006) defines the skill of supporting clients in taboo areas as, "Encouraging the client to discuss a sensitive or difficult area or concern (for example, sex, loss)" (p. 609). Laura utilized this skill during session six when she asked, "Do you want to talk about the specifics of the argument or do you feel you were able to resolve it?" This question led to a discussion about sex. Laura opened up the dialogue, listened, offered alternatives, and connected sexual issues with other themes in their relationship such as faith and the meaning of infertility.

16. Did Laura identify with one spouse more than the other? What is the evidence for this? How may this have affected her relationships and work with them?

In Laura's internal monologue she expressed a concern that she might not be reaching Roger or picking up on his clues, which she realized might indicate she identified more with Connie. From the first session when Laura found out that Connie's faith was important to her, Laura felt more of a connection with Connie

around the shared significance that they placed on faith. As seen in session two, at times, it was easier for Laura to identify with Connie as a woman and a wife. At other times, she identified with Roger, desiring to rescue him when Connie became angry or hostile during sessions.

### *Action*

17. How might Laura use the idea of forgiveness in her work with the Roberts?

Although the concept of forgiveness is rooted in religious traditions, in recent years it has been recognized and adopted by secular practitioners (e.g., Legaree, Turner, & Lollis, 2007). However, scholars recommend that clinicians consider issues of diversity, marginalization, and power relations, and that they also consider the views and values of clients when using forgiveness in therapy. It is also important to consider timing and not push the couple towards forgiveness prematurely. (Instructors may want to introduce the concept of forgiveness by using teaching suggestion #2 below.) As outlined by Gordon, Baucom and Snyder (2000), the basic process includes experiencing the impact of the event that occurred, searching for meaning as to why the event occurred, and moving forward with a “new set of relationship beliefs” (p. 216).

18. How can Laura help the Roberts heal and move beyond old wounds?

In any social work relationship it is important to establish trust so that clients are able to use the relationship to try out new methods of communication, etc., particularly when they struggle with their own issues of trust with one another. There are a variety of strategies a clinician could use at this stage. For example, a clinician may use the book, *His Needs, Her Needs* (Harley, 2006), that explores how couples can meet one another’s emotional needs. It includes a questionnaire in the appendix assessing emotional needs that she may ask each spouse to complete and bring to a session for discussion. Or she may ask the couple to read a chapter together about communication and ask for their reactions. She could also ask them to write letters of forgiveness to one another.

19. How can Laura help to foster intimacy in Connie and Roger’s relationship?

Laura has already begun to foster intimacy by modeling a helping relationship that is based on “both feeling heard and cared about” and building trust. Further exploration of the communication patterns of their families of origin that “did not express love and care” may provide clues about the patterns they established as a couple. In the beginning sessions the couple focused on their own individual needs and hurts. “Going hunting” seemed to symbolize their separateness and distance from one another as well as their mutual search for something more. The challenge in the middle stage of work was to help them move to relational dynamics and tasks as a couple. Connie mentions that “we have our good points” in relation to some of the activities that they enjoy together. Assignments may include some of these activities with specific directives on what communication should or should not take place to protect against some of the destructive patterns they have established.

## Reflection

20. What would be the most difficult issue for you to deal with in this case?
21. How do you establish and maintain personal and professional boundaries in professional practice?
22. In your own practice, what are signs that you may be over-identifying with clients? What would you do about this?
23. What are some challenges of working with clients who share your faith perspective? How would you handle these challenges?
24. What would be challenging for you about working with clients of a significantly different faith perspective?

## Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. In advance of the case discussion, assign students to read the article on spiritual assessment by Hodge and Holtrop (2002). Instruct students to choose one of the models and apply it to their own faith experience. In class, pair students up for a 10-minute exercise. Ask each student pair to discuss the model they chose and the strengths and limitations of the model. In the larger group, discuss the ways that these models may be of use in practice.
2. In class, ask students to reflect on their understanding of forgiveness by posing the following question: "What steps does one go through to forgive?" Ask them to write down their reflections for 10-15 minutes and then share their reflections with the rest of the class. As the instructor, read "The Use of Forgiveness in Marital Therapy" by Gordon, Baucom and Snyder (2000). This article outlines three stages in the forgiveness process that include experiencing the impact of the event that occurred, searching for meaning as to why the event occurred, and moving forward with a "new set of relationship beliefs" (p. 216). Authors from a Christian perspective add to these steps the concepts of reconciliation and the restoration of relationships (e.g., Augsburger, 2000; Jones, 1995).
3. In advance of the class discussion, assign students to read "Phases and Stages of Family Life" in *Family Ministry* (Garland, 1999). Ask students to identify the dynamics present in this case in relation to the phases of family formation identified by Garland. This could be done in small groups working at a chalk/whiteboard where their findings would be displayed for the class.
4. Alternately, instructors may use a similar exercise identifying the dynamics in the case specifically related to couples as a subsystem. Assign Chapter 5, "Beginning Phases with Couples: Process and Theory" and Chapter 6, "Middle Phases with Couples" in *Social Work with Families* (Constable & Lee, 2004). Ask students to identify the dynamics present in this case in relation to the phases of marriage identified by Constable and Lee.

5. Begin the class by asking students to take five minutes and write down what topics they think they would have the most difficulty discussing with this couple and have them hand in these papers anonymously. As the instructor, read the topics out loud to the class. Then ask students as a group to identify the sensitive or taboo areas that the social worker discussed with the couple (e.g., sex, faith, loss) and analyze the ways in which she addressed these areas. As the instructor, read the section on “Supporting Clients in Taboo Areas” in *The Skills of Helping Individuals, Families, Groups, and Communities* (Shulman, 2006) that helps to provide a further context for the analysis. At the end of class point out to students that they just spent the time discussing the very areas that they found difficult. What helped them to be able to discuss these sensitive topics? What obstacles remain?

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### *Print*

- Augsburger, D. (2000). *The new freedom of forgiveness*. Chicago: Moody Press.
- Canda, E. R., & Furman, L. D. (1999). *Spiritual diversity in social work practice: The heart of helping*. New York: Free Press.
- Constable, R., & Lee, D. B. (2004). *Social work with families*. Chicago: Lyceum Books.
- Garland, D. R. (2002). Families and their faith. In B. Huguen & T. L. Scales (Eds.), *Christianity and social work*. Botsford, CT: North American Association of Christians in Social Work.
- Garland, D. R. (1999). *Family ministry*. Downers Grove, IL: InterVarsity Press.
- Gordon, K. C., Baucom, D. H., & Snyder, D. K. (2000). The use of forgiveness in marital therapy. In M. McCullough, K. Pargament & C. Thoresen (Eds.), *Forgiveness*. New York: Guilford Press.
- Harley, W. F. (2006). *His needs, her needs*. Grand Rapids, MI: Revell.
- Hodge, D. R., & Holtrop, C. (2002). Spiritual assessment: A review of complementary assessment models. In B. Huguen & T. L. Scales (Eds.), *Christianity and social work*. Botsford, CT: North American Association of Christians in Social Work.
- Jones, L.G. (1995). *Embodying forgiveness*. Grand Rapids, MI: Eerdmans.
- Legaree, T. A., Turner, J. & Lollis, S. (2007). Forgiveness in therapy: A critical review of conceptualizations, practices, and values found in the literature. *Journal of Marital and Family Therapy*, 33(2), 192-213.

Murray, R. J. (2002). Forgiveness as a therapeutic option. *The Family Journal*, 10(3), 315-321.

Rotter, J. C. (2001). Letting go: Forgiveness in counseling. *The Family Journal*, 9(2), 174-177.

Saleebey, D. (2002). *The strengths perspective*. Boston: Allyn and Bacon.

Shulman, L. (2006). *The skills of helping individuals, families, groups, and communities*. Belmont, CA: Thomson Brooks/Cole.

Watkins, K. J, & Baldo, T. D. (2004). The infertility experience: Biopsychosocial effects and suggestions for counselors. *Journal of Counseling & Development* 82, 394-402.

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# **Not My Church: Teaching Notes**

*Clifford J. M. Rosenbohm*

## **Case Synopsis**

As a church social worker, Sandy Potts was in a position that allowed her to integrate her faith with her work. Working in a mega-church with over 100 staff members Sandy was able to provide for the needs of church and community members both physically and spiritually. With the appointment of a new senior pastor several things began to change that shook Sandy's confidence and faith in both the church and the role social work plays in the context of the church as a host agency.

Several staff members, including Sandy, were terminated without notice. The Care Ministry department went from a staff of eight down to two. The reason for these decisions was said to be duplication of positions on the church staff. Many concerns surfaced in Sandy's mind as she was confronted with the reality of an immediate termination. Issues about ongoing services to clients scheduled to come in over the next couple of weeks, supervision of volunteers and student interns, coordination of programs, and a host of other practical matters rushed to her mind. Professional and personal issues were also pressing on Sandy as she thought through what was happening. She had to decide how to handle relationships she had within the church, professionally as a social worker and personally as a member of the congregation. What role did she have now that she was no longer on church staff? She would have to decide if and how she should address what she perceived as injustice and lack of caring on the part of church administrators toward clients, volunteers, interns, and staff in their decision making.

## **Intended Case Use**

Written for a bachelor's level capstone or integrative seminar in social work, this case may also be useful for generalist practice courses at multiple levels (micro, mezzo, and macro). This case may also be useful for discussion of multiple topics such as social work values and ethics, personal and professional values, advocacy, agency contexts (church social work), professional self-care, and working in faith-based organizations.

## **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Understand system levels for purpose of intervention.
2. Describe church social work, and how it differs from practice in other private or public agency settings.
3. Identify distinctive missions in church and social work, and recognize potential conflict between the two.
4. Understand how organizational size may influence decision-making processes, and identify both the possible intended and unintended positive and negative consequences of decisions.
5. Identify how religious and professional models of social justice may differ.
6. Understand how a mega-church can be both asset and liability in a community, and how its decision-making affects the broader community (both intended and unintended consequences).
7. Articulate the role and responsibility of social workers to advocate for their clients, especially after they have been fired or laid off.
8. Understand how a social worker's personal history may influence his or her emotional reactions and decisions.
9. Understand how a social worker's personal and spiritual history motivates professional practice.
10. Develop sensitivity to spiritual implications of intervention and practice decisions in a church setting.
11. Recognize implications of dual relationships in a congregation.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

## *Facts*

1. What was Sandy's role in the congregation, what were her responsibilities, and to whom was she responsible?

Sandy Potts was both a member of the church and a staff member. She was the church social worker and held the title of Associate Director of Care Ministry. Sandy reported to the Director of Care Ministries, Bob Smart.

Sandy administered the benevolence program, which provided financial assistance for rent, utilities, food, and other dry goods. She provided direct case planning with clients around a variety of life issues. Sandy trained, coordinated, scheduled, and supervised approximately 25 volunteers and paid staff on how to work with people who came to the church for various services provided by the Care Ministries department. In addition, Sandy provided direct supervision for practicum students from local universities in social work and counseling.

2. What experiences and background did Sandy bring to her work as a church social worker?

Sandy received her bachelor's degree of social work (BSW) from Asbury College in 1971. Sandy was bilingual, speaking both Spanish and English. Sandy and her husband Bill were heavily involved in the Spanish ministry at Creekside since they had been missionaries for a number of years in Spanish speaking countries, primarily in Quito, Ecuador.

Sandy had been working at Creekside for more than three years. Now in her 50s, she had previously worked in several different capacities. She served with OMS International, formerly known as the Oriental Missionary Society, over a 20-year time span. After returning from the mission field, she volunteered at a Crisis Pregnancy Center for 3 years and directed a center for 1 year, taught Creating Positive Relationships (a sexual abstinence curriculum) in public schools for 4 years, and just before beginning work at the church she worked for a community action council for 8 months.

3. What is congregational (church) social work?

Church social work is social work within the host setting of a local church or consortium of churches. This can take many forms. Services may be provided to either church congregants or to community members, or both, depending on the mission of the church. "...church social work is social work that takes place under the auspices of a church organization" (Garland, 1999, p. 475). "A congregation refers to a group of persons who band together for religious purposes and have a shared group identity; they often have a central meeting place" (Garland, 1999, p. 476). The context in which social work is practiced is important in defining the nature of services offered. This would be similar for other host agencies such as schools or hospitals.

4. What services did the Care Ministry Department provide and to whom?

The Care Ministry Department provided a variety of services, both within the church and to the larger community. Services provided by the Care Department included financial assistance, material needs such as clothing, food, furniture, appliances, and cars. The church social worker disbursed between \$100,000-120,000 annually to people in need. The church gave \$1,000,000 more to missions each year. Direct services to clients through care planning activities around a



variety of presenting issues were offered both by the church social worker and trained volunteers.

### *Analysis*

#### 5. What led up to the current situation?

The church had recently incurred a \$16,000,000 debt for a new building project. Decisions had to be made on how to address this debt and the ongoing issues of growth the church was continuing to experience. The new senior pastor inherited these challenges and had a mandate from the Elder Board to come up with “X-amount of dollars” to alleviate the financial debt the church had incurred.

Because the budget constraints also had implications for staff levels, the elders and new senior pastor began reviewing the staff structure to determine whether there should be any restructuring. However, as they began to make decisions concerning staff, the elders and senior administrators told people that, “This is not a financial decision; this is just restructuring and simplifying because of duplication of jobs.”

#### 6. Who decided to fire church staff?

This appeared to be a decision made by senior administrators and the Elder Board of the church. The responsibility for carrying out the terminations was left to the Senior Executive Director, Peter Wilson, and human resources staff.

#### 7. What were the reasons for firing staff?

Duplication was the official reason given for the dismissal of staff. The possible underlying reasons for the decision could include: a power shift, burden of debt, possible ageism, and philosophical shift. Sandy Potts communicated these during her interview. She was basically raising questions about why staff were fired. The power shift had to do with the elders moving quickly to install a new pastor who also wanted to make some changes in staffing. It was also understood that the new pastor had been given a mandate to reduce the 16 million dollar debt as quickly as possible. As the decision to fire staff began to take place, other changes also began to take place with younger staff members being put into positions of responsibility and other older staff members being shifted to lesser roles of authority.

#### 8. What are the ethical issues involved? What sections of the Code apply here?

Several ethical issues were presented in this case, based on the question of organizational integrity through a lack of honesty in the presentation and process of eliminating staff. Additionally there were ethical issues about the responsibility of the social worker in a situation such as this.

The following sections from the NASW (1999) Code of Ethics may apply to the situation confronting Sandy:

**1.06 (c) Conflicts of Interest** - The nature of church social work often puts a social worker in a situation where dual relationships tend to exist. In this case, Sandy provided services to congregants but also had contact with them through worship and other church activities.

**1.15 Interruption of Services** - This was a dilemma for Sandy as she tried to ensure the continuity of services for existing clients. Sandy addressed this

in her termination meeting with administration and was told that everything would be handled but her concern was that services would be interrupted because no one would be available who had the experience or knowledge of the services and programs.

**1.16 (b), (e), and (f) Termination of Services** - The decisions made by the church administration put Sandy in an awkward professional and ethical position. Her employment was being terminated immediately. She had no warning and was not given a customary two weeks that would have allowed her to take the necessary steps to notify clients. The possibility of transferring, or referring clients, or even knowing if services would be continued was not an option.

**3.07 Administration** - One of the primary roles of administrators under this section of the Code was that of advocacy. Sandy is a mid-level administrator in the Care Ministry department. Her responsibility to advocate will be discussed in question 10.

**3.09 (b), (c), (d), and (f) Commitments to Employers** - This section of the Code addresses the social worker's commitments to the employer. Policies and procedures for the provision and continuation of services are not clear. Sandy may understand the ethical obligations of the social worker but in a congregational setting these guidelines may not be known or acknowledged by administrators as having any authority in making decisions about services to clients. This raises further questions about the role of the social worker in educating church administrators about professional ethical responsibilities.

**5.01 (a), (b), (c), (d), and (e) Integrity of the Profession** - Social work in a host setting can present ethical dilemmas when the host agency is not bound by the NASW Code of Ethics. It is questionable if the church administrators are aware of, or cared about, the professional guidelines for social work practice. This situation presented Sandy with an opportunity to address both the integrity of the social work profession as well as the integrity of process used by church administrators to terminate employees. Another dilemma for Sandy under this section of the code was the ongoing supervision of social work interns. After her termination Sandy found out that one social work intern would be taking over many of the responsibilities previously assigned to paid staff. This had the potential for being an ethical dilemma based on the qualifications of the intern.

Additionally, Sandy was contributing to practice knowledge, research and ethics by participating in the development of this decision case for use in education.

**6.01 Social Welfare** - It can be argued that the Church is responsible for "the realization of social justice" (NASW, 1999, p. 27). Social justice is a theme in both the Bible and the social work profession. Social justice is often presented from a macro perspective, but is also rooted in individual actions. Do the actions of the church administrators violate the rights of employees, clients, and the broader community with respect to social justice? Is the reputation of the Church further damaged by these actions?

What responsibility did Sandy have to her current clients, volunteers, and social work interns?

The NASW Code of Ethics addresses a social worker's ethical responsibility in 6 key areas (clients, colleagues, practice settings, as professionals, to the social work profession, and to broader society). Social workers have a responsibility to clients, specifically in the area of continuation of services, termination of services, and/or professional relationships.

Technically, when employees are terminated immediately, they not obligated

to continue working. Congregational social work, however, may add an additional dimension to this situation. For example, the nature of relationships in the church may be ongoing and not just confined to a professional social work relationship. Clients may relate to the church social worker in a variety of contexts, such as being a member of the same Sunday school class. Clients, volunteers, and interns may also attend the church during worship times and come into contact with Sandy. Relationships may continue even after official termination. This brings into question issues of dual relationships. "In instances when dual or multiple relationships are unavoidable, social workers should take steps to protect clients and are responsible for setting clear, appropriate, and culturally sensitive boundaries" (NASW, 1999, Code of Ethics, 1.06 (c), p. 9).

In reference to the volunteers that Sandy trained and supervised, she could inform them of the decisions made by church administrators and refer questions to them. She could meet with the volunteers as a group and inform them of possible options or actions they could take to address their concerns. This is related to her becoming a potential advocate and organizer for the rights of clients.

Sandy was supervising two interns when she was terminated. She informed them of the actions taken by the church administrators and the fact that she would not be able to continue in her supervisory role. Sandy also had a responsibility to inform the schools that placed the students in the internships at the church.

9. What were Sandy's responsibilities as a professional social worker to clients? Did this responsibility to clients persist after she was laid off?

Some of the issues have been addressed in question 7 and 8 above. Legally the individual social worker is not responsible if she is terminated immediately, but ethically the worker may "feel" responsible. In this case it was possible that Sandy would want to make sure that services were either continued or that clients were referred to other appropriate services. Sandy had been told that other staff would handle clients and services. She could have offered her expertise and skill to help ensure either continuation of services or referral of clients.

10. What were Sandy's responsibilities as a Christian? As a church member?

Social justice is a consistent theme in both the Old Testament (see Leviticus 19:15; Deuteronomy 24:17; Psalm 11:7, 103:6; 106:3, 140:12; Proverbs 21:15; Isaiah 1:17, 10:2, 59:4; Lamentations 3:36; Ezekiel 34:16; and Zechariah 7:9 as examples) and New Testament (see Matthew 23:23, 25; Luke 18:7; and 2 Corinthians 7:11 as examples). Christ calls us to responsibility for our brothers and sisters; care for our neighbors, and "the least of these." This is tied to advocacy for any number of groups that are disadvantaged or discriminated against.

As a church member, she can hold the church responsible for fulfilling its mandate to care for others as expressed in the Bible.

11. How might this situation differ in a secular agency?

Depending on the type of agency (state, NGO, for-profit, not-for-profit), a social worker may have some avenue for recourse against an agency's decision to terminate employment. State agencies often have formal legal processes that protect workers from the type of dismissal that took place in Sandy's church. There would need to be "due process" before an employee would be discharged. Unions may also play a role in protecting some employees from unfair labor practices.

Agencies whose primary purpose is social service may have different

administrative structures that would limit the impact of such a decision on clients, volunteers, and interns, and would provide for ongoing services. In addition, those charged with oversight (funders, boards, legislative bodies, and ombudsmen) would also influence what actions could be available to the social worker.

12. How does the issue of confidentiality affect Sandy's ability to discuss this situation with congregants? The school of social work?

Sandy could not discuss individual cases where specific client information would be shared in such a way as to identify the client. But she could have informed other congregants about her concern for the continuity of services by using examples of what could happen, while not identifying specific clients. She could also have informed other congregants about the process of how staff were terminated and what happened in her situation. She could have talked generally about decisions that were made and the impact these decisions have on services. She could inform the school of social work about her role as a site supervisor as well as how the intern's roles will change.

13. How can Sandy take care of herself in this situation?

This partly depends on her current pattern of self-care. Some possibilities might include a support group, professional supervision, reflective journaling, prayer, and consultation with someone removed from the situation.

*Action*

14. What, if any, additional action should Sandy take to advocate for clients, volunteers, students, and programming?

Sandy may have a professional ethical obligation to clients, volunteers, students, and services or programs (see questions 9 and 10 above) although she has no legal responsibility. If she chooses to advocate, she has several options. Ideally the leadership should make room for some type of "exit interview" with Sandy. If they do not, Sandy can request a meeting with the leadership to discuss her concerns about continuity of services to clients and appropriate referral of clients, ongoing volunteer coordination and training, and supervision of interns. Advocating for a meeting may allow her to address her concerns for the impact on the different people groups.

15. Assuming she feels some obligation to intervene further, what should she do? How should she proceed?

Sandy can request a meeting with her immediate supervisor and staff from her department to brainstorm and strategize possible responses to the decisions and possible consequences for clients, volunteers, and services. She could also send e-mails to volunteers with a request to meet to discuss implications of decisions. It would also be important for her to contact schools that have interns placed in the church to inform them of the decisions that will impact supervision. Finally, she should prioritize high risk clients and document in writing their needs to those in authority.

16. What are the likely consequences of intervening or not intervening?

If Sandy chooses to intervene she may be able to convince the church

administration to continue some of the services that will be immediately impacted from the terminations. This in turn could prevent some potential harm to clients who depend on the services of the church. Action on Sandy's part may force the decision makers to respond differently about how the continuation or termination of services will be handled. Accountability for decisions may cause administrators to reconsider their actions.

If Sandy chooses not to intervene, then many of the services being provided may be stopped at least in the short term. Possible harm to clients may include loss of services on several levels (financial, meeting of physical needs, negative impressions about Christian charity). Lack of any intervention may also allow church leaders to avoid accountability for their decisions, if no one is aware of what is happening to staff and those served by the church's services.

17. What, if anything, can/should Sandy say to fellow congregants about the situation?

Sandy can tell them what she has been told. It is not confidential information. She can share her perceptions on the decisions and communicate possible consequences of those decisions on clients and services being offered by the church. This could be perceived as sowing seeds of discord. It could also be seen as challenging injustice.

18. What are the pros and cons of telling or not telling others about it?

The pros: people may demand explanations of how and why decisions were made to eliminate staff. The congregation could request that staff terminations be reversed until further information is provided supporting these decisions. Staff could be retained until a thorough review is completed. Client services will be continued at the same level. The people in leadership positions could be held accountable for how the process unfolded.

The cons: Sandy could be perceived and labeled as a troublemaker. The church could split if there is strong disagreement about the decisions.

### *Reflection*

19. What experiences have you had in church life that may undermine your effectiveness as a congregational social worker? How would you handle dual relationships if practicing social work in a congregation?

### **Teaching Suggestions**

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Have students take on different perspectives (church leadership, terminated staff, Sandy, volunteers) for the purpose of role-playing potential responses to decisions made by administrators.
2. In small groups, have students identify the organizational structure of the church and the organizational structure of their field placement agencies and discuss the implications for decision-making with regard to termination of staff and continuation of services to clients.

3. In preparation for the class discussion, assign the articles by Garland (1995) and Van Hook (1997) listed below. Ask students to discuss the differences between practicing social work in a host setting like a church and in other types of practice settings.
4. Divide students into groups of three or four and have them discuss the issue of dual relationships that might occur with a social worker in a church setting.

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

#### *Print*

Garland, D. S. R. (Ed.). (1992). *Church social work: Helping the whole person in the context of the church*. St. Davids, PA: North American Association of Christians in Social Work.

Garland, D. R. (1995). Church social work. In R. L. Edwards (Ed.), *Encyclopedia of Social Work* (19<sup>th</sup> ed.) Vol. 1 (pp. 475-483). Washington, DC: National Association of Social Workers.

Hugen, B., & Scale, T. L. (2002). *Christianity and social work: Readings on the integration of Christian faith and social work practice* (2<sup>nd</sup> ed.). Botsford, CT: North American Association of Christians in Social Work.

Keith-Lucas, A. (1985). *So you want to be a social worker: A primer for the Christian student*. St. Davids, PA: North American Association of Christians in Social Work.

National Association of Social Workers (1999). Code of ethics. Washington, DC: Author.

# In Good Faith: Teaching Notes

*F. Matthew Schobert, Jr.*

## Case Synopsis

Brandon Dicorte, LMSW, joined Food for All as the agency's first Development Director. Food for All was a faith-based, non-profit organization that trained interns and educated the local community about sustainable agricultural development. Louis Touissant, an intern from Haiti, came to Food for All for a one-year internship program. Before his internship ended, Louis left Food for All, but he didn't return to Haiti; he disappeared into the U.S., violating the conditions of his visa. When Brandon and Food for All's Board of Directors learned that Louis hadn't returned home, they were confronted with the decision about whether or not to report Louis to Immigration and Naturalization Service (INS), now the U.S. Citizenship and Immigration Services (USCIS). They also had to consider how Louis' visa violation might affect the agency's reputation, fund-raising efforts, and ability to secure visas for future international interns, as well as what measures they could take to reduce the likelihood of this event ever happening again.

## Intended Case Use

Written for MSW-level and senior-level BSW social work courses in generalist social work practice, practice with communities and organizations, and agency administration and planning, it may also be used for specialized instruction in international social work, international relief and development, community development, and practice with faith-based, non-profit organizations.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. The generalist practice roles that typically characterize a social worker's practice in small, non-profit agencies.
2. The role and purpose of an agency's board of directors and the relationship between an agency's board and administrative staff.
3. The prevalence of dual relationships in small, faith-based organizations, and their positive and negative consequences.

4. Ways in which a social worker's religious faith can inform, influence, and shape social work practice decisions.
5. A model of international development, and the particular strengths and limitations of this model.
6. Ethical values and obligations, and how to adjudicate between competing ethical values and obligations in ethical-decision making.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What do we know about Food for All? What was FFA's model of international development? What was FFA's governance structure?

Food for All (FFA) was a faith-based, non-profit organization of Christian volunteers and professionals committed to the alleviation of world hunger. Located near Alexandria, Louisiana, the organization was founded in 1974 by agricultural missionaries from the Mennonite and United Methodist traditions.

FFA's model of development incorporated three components: 1) training, 2) education, and 3) on-site assistance in three inter-related areas: (a) sustainable agricultural development, (b) appropriate technologies for resource-poor communities in developing countries, and (c) conservation practices. Training interns in sustainable agriculture was the centerpiece of FFA's work. FFA recruited domestic interns for a 15-month internship program that included a three-month on-site agricultural development component in Central America. After completing the 15-month program, domestic interns began assignments with humanitarian or faith-based international development agencies. The internship program for international interns was only 12 months. Candidates must complete a lengthy application process and were only considered if they possessed adequate English language skills and had sufficiently strong family connections, i.e. a spouse and/or children, at home. After completing the 12-month internship, international interns returned home and disseminated the knowledge and skills they acquired at FFA.

FFA was governed by a Board of Directors that received staff reports from the Executive and Development Directors, set agency policy, and oversaw the



organization's operations through four standing committees. The committees included the Executive Committee, Program Committee, Fundraising and Development Committee, and Public Relations Committee. FFA's board was unique in that nearly all of the members routinely visited FFA and regularly volunteered their time and skills. This involvement gave board members a well-informed picture of the agency's operations and it also cultivated a strong relationship between the board, staff, interns, and volunteers.

The Executive Director, Pete Langen, ran FFA's daily operations, including managing the farm, training interns, and conducting community education programs. As Executive Director, Pete reported to the Board of Directors and supervised all agency staff, volunteers, and interns.

As Development Director, Brandon Dicortes supervised office staff and reported directly to Pete. He also reported to the Board of Directors on matters of finance, development, and public relations.

2. What do we know about Louis and his relationships with FFA and their staff?

Louis was an educated man from rural Haiti. He was in his early forties. He was single and had no children, although he had several siblings. Physically, his six-foot tall and stocky frame was rather imposing, but he possessed a deferential, gracious personality. Louis studied agroforestry at Port-au-Prince's Agricultural Polytechnic Institute and had a working relationship with FFA since FFA began working in Jacmel in 1981. He used his education to teach basic agroforestry skills, first with FFA and then later, beginning in 1987, for his brother, Blaise, who started Food for Haiti (FAH), a sister-agency to FFA. Louis was well known to FFA staff and volunteers and he often expressed an interest in interning at FFA for additional education and training in sustainable agricultural development.

After earning passing grades in several English courses, Louis was accepted by FFA as an intern. Unfortunately, his success in the classroom didn't translate into an adequate level of language proficiency in Louisiana. A number of factors strained Louis' relationship with FFA personnel. He had language difficulties; he didn't adjust well to the cool fall and cold winter weather; and he refused to share in domestic chores at the farm and dormitory. His relationship with the staff was strained further when he began expressing the desire to leave FFA for CIRAD, another agricultural development organization that was located in southern Florida. Despite several conversations with Pete Langen, Louis left FFA.

3. What was Brandon's professional training and experience? What was his role at FFA?

Brandon earned a master of social work degree with a concentration in healthcare from Tulane University's School of Social Work. After graduation he landed a job in pediatric oncology at Tulane University Hospital and Clinic. He worked as a clinician with children and families for three years before moving back to Alexandria, LA. In Alexandria he was hired as a social work supervisor at St. Mary's Children's Home. He spent ten years at St. Mary's, gradually moving from a social work supervisor into upper administration until he was one of St. Mary's senior social work administrators.

Brandon was recruited by FFA to serve as their first Development Director. In this capacity he used the administrative skills he honed at St. Mary's. Brandon's work at FFA focused on fundraising and development. As Development Director, he worked closely with the Board of Directors. He submitted regular

development and finance reports to the board and served on two standing committees, Fundraising and Development, and Public Relations. Because of his professional credentials and extensive administrative experience, he was highly regarded by the staff and board.

4. What was Brandon's religious affiliation and faith commitment? What role did it play in his personal and professional life, including his decision-making processes?

Brandon and his wife, Laura, and their children attended a Mennonite house church. Although some Mennonite traditions are quite traditional and maintain communal lifestyles generally separate from contemporary society, other Mennonite traditions actively engage society while maintaining their distinctive Mennonite theology and practices. Cardinal among these beliefs and practices are nonviolence and social justice. Brandon's affiliation with this socially conscious and socially active congregation suggests the importance he places on integrating his faith and his lifestyle. During college, he attended a small, non-denominational church. Many non-denominational churches emphasize worship, evangelism, and actively living out one's faith convictions. Brandon's faith commitment evidently played a significant role in his personal and professional life and seems to have influenced his decisions quite significantly – he participated in various community service activities during college, chose a helping profession for his career, worked for a religiously-affiliated children's home, made personal and professional decisions around the best interests of his family, joined FFA, and actively participated in worship and prayer. His biblical and theological beliefs about social justice, Jesus' radical message of discipleship, and the biblical injunctions to care for the vulnerable will undoubtedly inform his decision in this case.

### *Analysis*

5. Identify and evaluate the biblical and theological basis for FFA's mission.

The case study does not record FFA's mission statement; however, it describes the agency as a "faith-based, nonprofit organization of Christian volunteers and professionals committed to the alleviation of global hunger." The agency's founding also provides some clues to the biblical and theological basis and motivation for FFA's work. Agricultural missionaries from two different Free Church traditions – the Mennonites and United Methodists – founded the agency. This information suggests three important theological characteristics of the agency – a broadly evangelical approach to sharing the Christian message, a relatively ecumenical approach to carrying out this mission, and a socially-conscious awareness of Christianity's implications.

Even a casual reading of Christian Scripture, from either the Hebrew Bible (Old Testament) or the New Testament, readily reveals a consistent concern for the vulnerable, marginalized, and disadvantaged groups of people in Israel's history and the Mediterranean world. The Old Testament trio of "widows, orphans, and sojourners" provided specific examples for the broader vulnerable categories of women, children, and immigrants. The New Testament emphasized these groups also, as well as the "sick" and "imprisoned," catch-all terms for those suffering from socially stigmatizing and ostracizing diseases (the sick) and criminals (the imprisoned). Throughout Christian Scripture, God also demonstrates a special concern for the well-being of "the poor and hungry." FFA's biblical mandate to care for "those who hunger" rests upon firm biblical evidence.

Theologically, FFA may resonate with the Protestant-rooted Social Gospel movement from the nineteenth and twentieth centuries and with Roman Catholicism's Liberation Theology movement from the 1960s. Each of these traditions, in its own way, called its respective Christian communities to attend more closely to and respond to the human needs and social implications of the Christian message. Many Protestants and Catholics became suspicious of these movements because of their emphasis on advocating for, providing for, and advancing human needs – economic needs, healthcare needs, and human rights needs. Some Christians viewed these endeavors as departing from the tasks of preaching, worship, and personal piety.

Christian students studying this case may also struggle with recognizing this agency as a specifically “Christian” agency due to its emphasis on educating and training people in sustainable agriculture rather than teaching and evangelizing non-Christian people about the Christian message. Encourage students to verbalize and explore their notions of the spiritual and social dimensions of the Christian message.

6. What dual relationships existed between FFA's staff and board? What were some potential dilemmas these dual relationships posed?

As with many small, faith-based agencies, dual relationships were prevalent at FFA. The most notable cluster of dual relationships involved Pete, Brandon, and a couple of the board members who worshiped together in a small congregation. These dual relationships may foster a deep sense of solidarity with and commitment to one another and to FFA, but they may also pose potential personal and professional hazards. Any disagreements at FFA may spill over into their church fellowship or vice-versa. Another temptation this group may face is the tension between interacting with and responding to one another as “Christian brothers and sisters,” rather than as professional and business colleagues with fiduciary and legal obligations and liabilities. Navigating the dimensions of such close personal, religious, and professional relationships is fraught with potential problems. Also, if other board members, staff, or supporters began to interpret this subgroup as regularly “speaking with one voice,” this may threaten the board's working relationship and become divisive. Another dual relationship of concern involved Elizabeth, who was on the board, and her husband, Jesse, who was going through the process to join the board. The dynamics of a husband and wife serving together on a board of directors brings a host of complicating factors, similar to, but more exaggerated than, those just cited.

7. Brandon was the first professional with an advanced degree and extensive administrative experience to join FFA. How did Pete and the board regard him?

Brandon's education and experience brought a greater degree of professionalism to FFA. The decision to recruit him reflected the agency's awareness of its organizational growth and emerging need for more specialized and diverse staff. As the dialogue reveals, Brandon judiciously offered comments summarizing previous statements, reframing the discussion, and keeping the conversation from ‘overheating’ or bogging down. Since no one took issue with his remarks, the group appeared to respect him a great deal and may even grant him a certain degree of authority. Certainly, Angela, the Board President, deferred to Brandon when she asked what he thought they should do.

8. What generalist social work roles characterized Brandon's work with Food for All? Did Brandon's work qualify as social work? Why or why not?

Finding a licensed social worker in an organization like FFA may strike many as peculiar. Two social work roles that stand out are the social worker as administrator and the social worker as social change agent. Social workers with advanced degrees and several years of direct practice experience often move into administrative positions with social service agencies. In these capacities, the organization becomes their primary client or client-system. Administrative social work involves a wide-range of skills and functions, including organizational assessment and management; working with a board of directors; reviewing, assessing, and developing agency policies and programs; staff development; fundraising; and inter-agency collaboration.

Besides being involved in these functions, Brandon, in representing FFA to the local community through his responsibilities in public relations, is fulfilling the role of the social change agent. He educated the local community about issues of hunger, poverty, and the environment, and he pointed out the intimate connections between these issues. Through community education and awareness-raising, Brandon worked toward positive social, economic, and environmental change in local and international communities.

9. What was Brandon's decision-making role in this case? Who were the other key decision-makers? How did Brandon's decision relate to their decisions? What authority or influence did Brandon have in this situation?

At the institutional level, responding to Louis' disappearance was not Brandon's responsibility. Although the Board President solicited his input, the decision ultimately rested with the Board of Directors. Pete was obviously another key player in this decision, however, as with Brandon, his role was also restricted to making a recommendation to the Board. The Board of Directors, as FFA's governing body, was the final decision-maker. And yet, Brandon and Pete can significantly impact the Board's decision, depending on how they assess the situation and the rationale they provide for a particular course of action. Their potential impact on the board's decision, therefore, should not be minimized.

10. What differences of opinion were present among the Board members? What concerns motivated these differences?

Several board members were quite concerned, and perhaps justifiably so, about how Louis' departure from FFA would impact the agency. Although the board understood they were not required to report Louis' apparent visa violation, they were clearly split on how to respond to this event. A few board members, particularly Allison and Brenda, believed the best course of action was to report Louis. Others, including Catherine and Percy, along with Pete, were resolved against reporting him. The remaining members and Brandon appear undecided.

Allison and Brenda expressed concern for protecting the agency and its reputation, and for ensuring that its work didn't suffer any damaging consequences if the general public, their supporters and donors, or INS learned that FFA could not account for Louis' whereabouts.

Despite their disappointment, Catherine, Percy, and Pete believed they owed a greater responsibility to understanding and respecting Louis' decision. For

them, especially as Pete and Catherine expressed it, this dilemma had less to do with suffering possible consequences for not reporting him and more to do with following numerous biblical injunctions regarding seeking the welfare of “the stranger in your land.”

11. What did it mean for FFA to act “in good faith?” To whom was the board or agency accountable?

The notion of acting “in good faith” is layered with meaning. The board needed to think through what this meant with regard to various subjects—the agency itself; their base of volunteers, supporters, and donors; other interns; the U.S. government and federal agencies; God and their religious convictions; Blaise, Food for Haiti, and the community of Petite Jacmel; and, of course, Louis.

The board and staff may have had different perspectives on what acting “in good faith” means in relation to these subjects. For example, the board, although feeling some degree of sympathy for Louis, may have concluded that taking a stronger position, perhaps even to the extent of notifying INS, is in the agency’s best interests in terms of credibility, its future ability to secure visas for international interns, and continuing to fulfill its mission. The staff, on the other hand, because they knew Louis more intimately, could have conceivably opted for protecting him, proposing a variety of program and policy changes, and risking the possibility of suffering undesirable consequences from outside parties who might disagree with their decision.

12. What role does the severe disparities of socio-economic status (SES) which exist between Louis’ world and that of the members of FFA’s stakeholders play in this case? How might this disparity color the viewpoint of each party and influence their decision?

This case candidly presents some of the challenges confronting the severe SES disparities that exist between the wealthiest nation in the history of world – the U.S.A. – and the poorest nation in the Western hemisphere – Haiti. Although this case arises from Louis’ decision to stay in the U.S. rather than return to his life in Haiti, it is important to note the inverse of this frequently occurs when Christians from the U.S. or other economically-advantaged countries move to developing countries to engage in ministry and development work. Many of these Christians, although certainly well-intentioned, often struggle significantly to adjust to lives of deprivation and hardship, devoid of comforts to which they were accustomed in the U.S. Those that go to developing countries can return when they are ready, when they need to do so for personal or professional reasons, or after they complete their assignment. They are not expected, and neither do they expect, to make a permanent move to countries such as Haiti. These two moves, Louis’ move from Haiti to the U.S. and the move of FFA interns from the U.S. to countries like Haiti, represent very different circumstances. Recognizing this may contribute to understanding, although not necessarily supporting, Louis’ decision.

Some board members obviously strongly objected to Louis’ decision to violate his VISA and immigrate illegally to the U.S. Most likely, many of FFA’s stakeholders will share this viewpoint. Evidently, the moral issues prominent from this perspective include Louis keeping his word and obeying U.S. immigration law. Clearly, both of these matters involve moral and ethical issues and it is relatively easy to see this case from their perspective, share their indignation, and arrive at their conclusion. However, the ethical dilemma in this case involves the conflict between a competing moral viewpoint and set of

moral issues. Other board members and at least one staff member, the executive director, sympathized with Louis for several reasons. Brandon and Pete noted the personal, social, cultural, and economic reasons for Louis to remain in the U.S. He has family and friends in the well-established Haitian community in south Florida and he can escape Haiti's grinding poverty for a chance at a better life. Pete made the startling claim that it is more rational for Louis to stay in the U.S. than it is for him to return to Haiti. In fact, Pete declared that freely returning to life in Haiti would be *irrational*; therefore, how can people object to Louis' decision?

This dilemma also raises two related issues – (1) the question of loyalty to a nation state versus loyalty to a religious community and (2) the ability of North American Christians to judge the lives and decisions of Christians from intractably impoverished and remarkably dissimilar parts of the world. The case Brenda and Allison made for notifying INS is in line with demonstrating loyalty to the rule of law in the U.S.; however, the case Pete and Catherine appear to make reflects a greater concern for seeking and respecting the welfare of a fellow Christian and being faithful to their understanding of the biblical mandate to care for “sojourners” (immigrants), regardless of their legal status. Many Christian persons and communities struggle with questions of fidelity, allegiance, loyalty, and obedience to national laws versus religious commitments when it comes to matters of complicated ethical issues such as abortion, euthanasia, capital punishment, warfare, paying taxes, and even immigration. This case is no different. Christians of good conscious earnestly disagree with one another.

This case also raises the issue of the ability of Christians in North America, who live relatively privileged, empowered, and economically-advantaged lives to judge what is or is not “right” for Christians from countries afflicted with long-term poverty, hunger, unemployment, disease, and war. Without experiencing or living in such conditions, how competently can North American Christians judge fellow believers from such strikingly different backgrounds, circumstances, and situations?

13. How might Louis' apparent visa violation hurt the agency? What difference would it make if the board decided to report Louis to INS? What if they decided not to report him but took other actions to prevent this situation from happening again?

Louis' unwillingness to complete the internship program and his failure to return to Haiti raised numerous concerns for FFA's staff and board. We can speculate that other FFA interns, volunteers, and staff shared this disappointment. This chain of events was a definite setback for FFA's work with FAH. Louis' decision deprived FAH of a rare and valuable resource—one of its most educated and experienced staff. The loss this represented to FAH and Jacmel cannot be understated. It also raised important issues about how this event would affect the working relationship between FFA and FAH, and how it might influence the attitudes of Jacmel's residents toward both agencies.

Louis' action may entice other international interns to risk violating their visa to stay in the U.S. rather than return home. This potential for further visa infractions would have drastic consequences for FFA. The challenge for FFA is to respond to this crisis in a way that neither seems to condone or encourage international interns to immigrate illegally nor alienates international interns by appearing overly harsh or punitive. Reaction from FFA's supporters and donors is likely to be as diverse as, if not more so than, the board's reactions. Because Louis' flight is the first incident of its kind, most supporters and donors aren't likely to withdraw their support from FFA. They will, however, want to know

what the agency did in response to this incident and how the agency plans to respond if it occurs again.

Although INS doesn't appear able to hold FFA legally responsible for Louis' departure or for not reporting it, it is certainly possible that FFA may encounter greater difficulty securing visas for future international interns.

FFA faced a difficult decision and perhaps difficult days ahead as they dealt with the unfolding consequences of Louis' departure and apparent visa violation. But the agency also needed to recognize that this incident represented a unique opportunity for FFA to gain credibility and enhance their work. This will rest, however, upon the board's decision and its implementation, and how FFA's constituents interpret the agency's responsiveness.

14. What differences, if any, would it make if this event happened after September 11, 2001?

The September 11<sup>th</sup> terrorist attacks and the U.S. government's legislative and policy responses, especially toward international visitors on student and work visas, will influence some people's decision about this case. Even though FFA is not required to do so, many may insist on the rightness, or at least the appropriateness, of reporting Louis.

For others, these events will not convince them to report Louis. Many will see him, not as a potential terrorist threat loose in the United States, but as someone desperately trying to escape the crushing poverty and despair that so pervasively afflicts Haiti. In fact, some people may be compelled not to report Louis because of the severe treatment and civil rights violations of many people, among them U.S. citizens, legal and illegal immigrants, and asylum seekers, detained in the wake of September 11<sup>th</sup>.

### *Action*

15. How do you think Brandon will answer Angela's question?

Throughout the board meeting Brandon used a variety of active listening and conflict management skills to manage the intensity of the conversation. It is unlikely he will make a suggestion that would alienate up to one-half of the board. Because the responsibility for Louis to honor his visa and return to Haiti does not lie with Brandon or FFA, Brandon is unlikely to recommend reporting Louis to INS or to anyone else. But considering the seriousness of Louis' premature departure and his apparent disappearance into American society, Brandon will probably want to take steps to prevent this situation from happening again.

As students consider what they would do if they were in Brandon's position, encourage them to brainstorm a list of possible recommendations Brandon can make to the board. Also, ask students to consider the potential consequences of each recommendation and how these consequences might affect their final decision.

16. Given Brandon's limited decision-making role in this situation, what, if any, responsibility does he have to act if the board determines a course of action contrary to his recommendation? What might be the basis for his action?

Consider a scenario in which Brandon advises the board to report Louis yet the board decides not to do so. Brandon may feel an obligation to act on his reasoned conviction and therefore take it upon himself to contact INS out of

professional ethics or biblical values. For example, as a social worker he may regard FFA as the client system to whom he owes the greatest responsibility and thus arrive at the conclusion that it is in FFA's best interest to contact INS and be as forthcoming with Louis' disappearance as possible. He may also feel a responsibility, based on certain passages in the Bible, to see that state laws are upheld and respected. Acting contrary to the board, however, may seriously jeopardize his job and his working relationship with the board, the consequences of which are also crucial for him to consider. Or, consider that Brandon recommends not reporting Louis, but the board decides to do so. Would Brandon have any recourse for action in this scenario, other than resigning in protest?

17. What policy or actions, if any, should the board adopt regarding international interns who leave before their internship concludes or who refuse to return home? How might the agency prevent this event from happening again?

FFA has an excellent track record of successfully training international interns. Contrary to some of the fears expressed by Jesse, it is highly doubtful that FFA is in danger of becoming "a wormhole for illegal immigration." This event, however, does suggest the need to evaluate and consider possible changes to FFA's international internship program and related policies. Areas for special consideration include improving the application and screening process, being more attentive to international interns' experience of U.S. culture, and considering policies which specifically address FFA's responsibility and outline action steps in the event an international intern does not complete the program or violates his or her visa during or after the program.

### Reflection

18. Consider your faith commitments. If you were Brandon, how would your deeply held religious beliefs and values affect what you would choose to do?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. This case takes place in an agency that may strike some readers as an atypical setting for social work practice. They may ask, "What is a social worker doing in an organization like Food for All? And just what is the relationship between social work and sustainable agricultural development?" To help students reflect on these and similar questions provide students with some of the additional resources on sustainable development such as the NASW statement on "Environmental Policy" (National Association of Social Workers, 2000) and others listed below (e.g., Commissioner of the Environment and Sustainable Development, 2001; Norman, Janke, Freyenberger, Schurle, & Kok, 1997; United Nations, n.d.; World Commission on Environment and Development, 1987). Encourage students to discuss the case and these questions in light of these resources.
2. Likewise, students may have limited knowledge about poverty outside of the United States. Assign students to research poverty in Haiti and other Caribbean nations, perhaps focusing on poverty in rural areas. Alternate-



ly, assign students one or more readings from the resources listed below (e.g., Central Intelligence Agency, 2002; Pan American Health Organization, n.d.; United States Agency for International Development, n.d.; World Food Programme, 2002).

3. Despite growing numbers of immigrants in the past several decades and associated public controversies, many social work students may know little about immigration policy. Instructors may refer students to some of the resources identified below (e.g., Rapid Immigration.com, n.d.; U.S. Citizenship and Immigration Services, n.d.; USVISA.com Associates, n.d.).
4. Finally, students unfamiliar with Brandon's religious tradition may wish to explore other resources identified below (e.g., Mennonite Church USA, n.d.; Third Way Café, n.d.).

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

#### *Print*

World Commission on Environment and Development. (1987). *Our common future*. Oxford, UK: Oxford University Press.

National Association of Social Workers. (2000). Environmental policy. In P. L. Delo (Ed.), *Social work speaks: National Association of Social Workers policy statements, 2000-2003* (5<sup>th</sup> ed., pp. 101-108). Washington, DC: NASW Press.

#### *Electronic*

Central Intelligence Agency. (2002). *CIA world fact book*. Retrieved October 15, 2009, from <https://www.cia.gov/library/publications/the-world-factbook/index.html>

Mennonite Church USA. (n.d.). *Mennonite Church USA*. Retrieved October 15, 2009, from <http://www.mennoniteusa.org>

Norman, D., Janke, R., Freyenberger, S., Schurle, B., & Kok, H. (1997). *Defining and implementing sustainable agriculture*. Kansas Sustainable Agriculture Series. Retrieved October 15, 2009, from <http://www.kansassustainableag.org/Library/ksas1.htm>

Office of the Auditor General of Canada. (2008). Commissioner of the Environment and Sustainable Development. Retrieved October 15, 2009, from [http://www.oag-bvg.gc.ca/internet/English/cesd\\_fs\\_e\\_921.html](http://www.oag-bvg.gc.ca/internet/English/cesd_fs_e_921.html)

Pan American Health Organization. (n.d.). Country profiles: Haiti. Retrieved October 15, 2009, from [http://www.paho.org/English/DD/AIS/cp\\_332.htm](http://www.paho.org/English/DD/AIS/cp_332.htm)

Rapid Immigration.com. (n.d.) *H-3 Visas Trainee Visas*. Retrieved October 15, 2009, from [http://www.rapidimmigration.com/usa/1\\_eng\\_info\\_h3trainee.html](http://www.rapidimmigration.com/usa/1_eng_info_h3trainee.html)

Third Way Café. (n.d.). *Third way café*. Retrieved October 15, 2009, from <http://www.thirdway.com/>

United Nations. (n.d.). *Division for sustainable development*. Retrieved October 15, 2009, from <http://www.un.org/esa/sustdev/sdissues/sdissues.htm>

United States Agency for International Development. (n.d.). *Mission in Haiti*. Retrieved October 15, 2009, from <http://www.usaid.gov/ht/>

U. S. Citizenship and Immigration Services. (n.d.). *U.S. Citizenship and Immigration Services* (formerly Immigration and Naturalization Service [INS]). Retrieved October 15, 2009, from <http://www.uscis.gov/portal/site/uscis>

USVISA.com Associates. (n.d.) *H-3 Visas for Trainees*. Retrieved October 15, 2009, from [http://www.usvisa.com/h-3\\_visa.shtml](http://www.usvisa.com/h-3_visa.shtml)

World Food Programme. (2002). *Country brief: Haiti*. Retrieved October 15, 2009, from [http://www.wfp.org/country\\_brief/index.asp?region=4](http://www.wfp.org/country_brief/index.asp?region=4)

# Unanswered Prayers: Teaching Notes

*Mackenzi Huyser*

## Case Synopsis

Stephanie Underwood, BSW, a Family Advocate at the Unity Center, a Christian domestic violence center, began to work with Rebecca. Rebecca was a Christian, worked at her church, and was living in an abusive situation with her husband, Steve. Tensions increased when Rebecca made a decision to end her marriage and the church terminated her employment because of her decision. Rebecca called Stephanie in the middle of this crisis and Stephanie had to decide how to respond to the situation.

## Intended Case Use

Written for an undergraduate level social work course in practice with individuals and families, this case may also be used for specialized instruction on religion/spirituality in social work practice, policy, diversity, and values and ethics, or, more generally, for instruction on social work direct practice, family treatment, case management, or human behavior in the social environment.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Recognize the cycle of domestic violence and barriers to breaking this cycle.
2. Recognize the ways that religious beliefs may contribute to domestic violence.
3. Recognize the ways that religious beliefs and practices (on the part of clients, their social networks, social workers and/or faith-based organizations (FBOs) may complicate domestic violence interventions.
4. Articulate professional ethical standards in the area of domestic violence.

## Discussion Questions and Answers

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

### *Facts*

1. What do we know about Rebecca?

Rebecca was a married mother of two sons who are currently seven and nine years old. She was a Christian and very involved in her church. She was also employed by her church as the Assistant Director of Music. Rebecca's husband, Steve, began being violent toward her about one year ago after eleven years of marriage.

2. What do we know about Stephanie Underwood?

Stephanie held a BSW degree. She worked as a Family Advocate at the Unity Center, a Christian domestic violence agency. Stephanie had been married for two years.

3. What do we know about Faith Presbyterian Church? Specifically, what do we know about its theology of divorce and beliefs about abuse?

Faith Presbyterian Church, a Presbyterian Church in America (PCA) congregation, believed divorce should be worked out together with the couple and the church and that divorce was not part of God's plan for Christians. The leaders from this church believed they should be the ones to help make decisions about divorce and reconciliation of a couple, and that the Marriage Dissolution Petition should not have been filed. The church leaders seemed to have a heavy reliance on prayer alone. They also believed in using church discipline (e.g., they suspended Rebecca's membership and terminated her employment with them) when a member did not act in accordance with their beliefs and church practices.

In addition, the church and its leaders did not appear to take into account how the presence of domestic violence might affect their beliefs about divorce or how domestic violence might affect members of their church. Rebecca thought that the church leaders did not understand her assessment of the relationship or respect her decision to leave an abusive situation. Rebecca's impression that "other staff discounted her reports of abuse" and the fact that those in leadership told her "pray harder" imply that domestic violence may not be recognized in this church for the violent impact it has on women and families.

4. What do we know about the Unity Center? What specific policies do we learn about which have a direct impact on the situation?

The Unity Center was a non-profit private Christian organization supported by churches, private foundations, and United Way funds. The Unity Center had a board of directors, executive director, and seven professional staff.

One specific policy that had a direct impact on this case is the policy that required all staff to be female and Christian. While this policy appeared to narrow the perspectives of staff, it may have, in fact, broadened the perspective of the agency. More specifically, in this case we discovered that Stephanie and Rebecca had different perspectives on domestic violence and what it could mean for the institution of marriage (e.g., Stephanie's husband would be "out the door"). Additionally, female staff may also have brought different perspectives about their rights and roles as women in domestic violence situations.

### *Analysis*

5. [Assuming students have been introduced to this topic previously:] What do we know about domestic violence and the cycle of domestic violence?

Domestic violence occurs in many different intimate relationships such as between spouses, partners, or in dating relationships (Brewster, 2002, p. 24). Domestic violence may include any of the following types of abuse: physical abuse, emotional abuse, spiritual abuse, sexual abuse, or economic abuse (Brewster, 2002, p. 24; Chicago Metropolitan Battered Women's Network, 2003). In addition, domestic violence may include verbal attacks, isolation, coercion and threats, and intimidation. Social workers practicing from a strengths perspective refer to a person experiencing domestic violence as a "survivor" rather than "victim" (Kirst-Ashman & Hull, 2002, p. 456).

The cycle of domestic violence tends to be characterized in three phases (defined differently by different authors). The first phase is the tension-building phase which involves increasing stress, tension, and conflict. The second phase is the incident phase in which the abuser/batterer explodes and assaults the spouse or partner. The third phase is the "honeymoon" phase which occurs after the batterer has released (usually) his stress and tension, and expressed sorrow for what he has done and swears he will not do it again (Brewster, 2002, p. 31; Kirst-Ashman & Hull, 2002, p. 457). At this point in the intimate relationship the couple may "make-up" and expresses their love for each other (e.g., "Often he will give her gifts and pay a great deal of attention to her and her needs." [Brewster, 2002, p. 31]). It is common for this cycle of violence to repeat itself over and over again in a relationship.

The cycle of domestic violence described above is extremely difficult to break. A number of different reasons may explain this difficulty. "The reasons they remain or return include economic independence, lack of self-confidence, lack of power, fear of the abuser, adherence to traditional beliefs, guilt, fear of isolation, fear for their children, and love" (Kirst-Ashman & Hull, 2002, p. 457).

What authors refer to as "traditional beliefs" may include theological interpretations that hold marriage in high regard and forbid divorce, the expectation and desire to forgive, religiously based hope for change and reconciliation, and continuing love for the spouse. In this case, Rebecca refers to her church's theological interpretation that "divorce is not part of God's plan for Christians" and her pastor's expectation that she is called to work for reconciliation and forgive her husband.

6. What kinds of domestic violence did Rebecca experience?

Rebecca experienced emotional abuse in the form of isolation and “being cut off from the outside world.” In addition, Steve told Rebecca that the abuse that was occurring was “all in her head” and suspected her of an affair with a coworker. Rebecca also experienced physical and verbal abuse. The physical abuse was in the form of being slapped and pushed by her husband. The verbal abuse was being called a “liar” and “cheater” for the suspected affair with a coworker.

7. What evidence was there for the “cycle of violence” in this case?

The first phase of the cycle of violence was the tension-building phase. Some examples of this phase in the case included the emotional abuse in the form of isolation and “being cut off from the outside world”; psychological abuse, such as telling Rebecca that the abuse was “all in her head” and suspecting her of an affair with a co-worker.

The second phase of the abuse was the incident phase. Some examples of this phase in the case include: the physical abuse, being slapped and pushed by her husband, and the verbal abuse, being called a “liar” and “cheater” for the suspected affair with a coworker.

The third phase, the honeymoon phase, was not clearly evident in this case. Rebecca contacted the agency during the course of a crisis, and she discussed earlier “honeymoon like” stages in her marriage relationship, but these stages were not clearly connected to the presenting issue of domestic violence. A second possibility for the limited evidence of the honeymoon stage was that in situations of domestic violence, as the abuse continues and the pattern becomes more severe, the honeymoon stage may shorten or not be reported at all.

8. How did Rebecca’s beliefs make it difficult to break the cycle of violence she was experiencing?

Rebecca frequently referred to her church’s and her pastor’s beliefs about the marriage relationship. Some examples include: “Several people told me to pray harder for my husband and our marriage”; “My pastor said the Lord can change people, and I believed what my pastor says so I continued to pray”; “He also said as Christians we are called to work for reconciliation and forgive each other for our wrongdoings.” And finally, “My church believes divorce is not part of God’s plan for Christians.” These statements shared by Rebecca affect how she thinks about her situation and what actions she does or does not take.

It also appears that Rebecca was simply repeating the messages she has heard from her church about divorce and not necessarily considering what her own beliefs might be about divorce. In fact, the case discusses only a recitation of what Rebecca’s church believed and shows no real evidence of her own beliefs. She did begin to question some of these beliefs when she said to Stephanie, “God forgives us- shouldn’t I continue to do that for Steve?” However, this suggests that Rebecca might not have her own strongly held beliefs, or is only beginning to question some of the beliefs she is told in her church. Because of the place Rebecca is with regard to these beliefs, it appeared that Rebecca had not previously considered leaving the marriage relationship or ending the cycle of violence she was experiencing. The trigger event that forced Rebecca to make the decision to leave was when she saw her husband cleaning his handguns.

9. What were some “red flags” for Rebecca’s safety? What reasons did she have for concern?

“Red flags” in Rebecca’s life included suspected manipulation of her relationships with coworkers, restricting her access to their finances, physical abuse, and threatening behavior toward her. Rebecca was justified in concern for her own safety as well as for her children because of guns in the home.

10. From our knowledge about domestic violence and the cycle of abuse, was Rebecca’s rapid response to the episode with the guns surprising? What about Rebecca’s interpretation of his abusive behavior?

Though Rebecca’s pattern of abuse had been over a period of a year, the heightened risk of more severe abuse (husband “cleaning his handguns this afternoon”) resulted in her identification of a crisis situation and a call for help. Also, she had recently been educated by Stephanie regarding her options for help and escape. All of these factors may have contributed to Rebecca’s call for assistance.

11. Rebecca reported that she attempted to seek counseling through the church. What are some of the potential risks and benefits associated with this counseling done by the church? Also related, how can a person’s congregation be a help or hindrance with its parishioners’ marital problems?

Churches can provide supportive environments to work through life’s issues in the context of a shared faith. However, there are risks, when, as in Rebecca’s husband’s case, inappropriate behavior is rewarded, rationalized, or ignored. Rebecca’s husband was reluctant to get help from the church and the church did little other than make Rebecca feel bad and tell her to pray harder.

In addition, many times pastors and counselors in churches are not trained in domestic violence situations and do not know how to counsel couples with serious relational issues. As in this case, unwillingness to participate in counseling might also be a challenge for churches. Serious marital conflict often requires law enforcement approaches to gain participation in counseling. Church leaders do not have the necessary legal authority in congregations where membership and participation are both voluntary.

12. What is a Petition for Relief? What are some of the benefits of this petition? How protective is this petition? Where can Rebecca stay and still be protected with this petition?

According to Minnesota law, a Petition for Relief restrained Rebecca’s husband from committing acts of domestic violence by keeping him from their home, from an appropriate area surrounding their home, and from her workplace.

Some of the benefits of this petition and the order for protection included that a mandatory arrest would occur if the protection order was violated, and this legal action provided documentation of the violent situation Rebecca was experiencing.

This protective order was only a piece of paper, and therefore did not provide much physical protection for Rebecca. Rebecca’s husband could have easily violated the order for protection. This was, however, the first step in starting the legal process and ending the abusive relationship.

13. After Rebecca filed the Petition for Relief she reported she was going to her sister’s house. What are some of the risks and benefits of Rebecca

using her family network for support versus the agency shelter system for support?

Rebecca may have placed her sister and her sister's family at risk of harm by her husband if she utilized her family support network. It may also have been easier for Rebecca's husband to find her and the children at her sister's house. However, relying on family members with whom she is familiar may have been helpful emotionally during this difficult time, both for her and for her boys.

14. How may Stephanie's age and experience have influenced her response to Rebecca? How did her view of domestic violence affect how she might help Rebecca?

Stephanie had two years of experience working in domestic violence. She was younger than Rebecca and was in a young marriage, in which she was assertive about, "making my feelings known about many issues in our relationship." She was a strong advocate for equality and had made her husband aware of the fact that "if you ever threaten me like my clients are threatened, you will be 'out the door'." She balanced this perspective with a determination to have a "successful, happy marriage."

Because of these differences, she may have viewed the situation without much knowledge about domestic violence and its impact on Rebecca. In her personal life, Stephanie appeared to be very strong in her attitudes about her marriage relationship. Because of this she would have needed to be careful not to push Rebecca too quickly or to act in the same way she believed she would act in her marriage.

15. How does the funding structure in place for this agency impact how they work with clients, especially clients of faith who may be members of supporting churches?

Because the majority of funds came from supporting churches, there may have been difficulties when the agency worked with clients from those churches and differed from the church regarding a course of action. Clients of faith may have been hesitant to do what the agency recommended if it went against what the church said about marriage.

16. When it comes to issues of domestic violence, what Code of Ethics standards should social workers recognize as particularly relevant?

The Code of Ethics focuses on a number of values, ethical principles, and ethical standards, which may be of particular importance in cases of domestic violence. The values and ethical principles emphasized in this case may include:

**Dignity and worth of the person:** social workers respect the inherent dignity and worth of the person (e.g. respect for Rebecca's church leaders, her husband, Rebecca's own dignity and worth)

**Importance of human relationships:** social workers recognize the central importance of human relationships (e.g. Rebecca's husband may still be of importance to her, Rebecca's boys may still be important to her husband and the boys may still see the relationship with their father as important, Rebecca may still see the relationship with her church leaders as important)

Additional Code of Ethics standards, which need to be considered, include the following: 1.02 Self-Determination; 1.04 Competence; 1.07 Privacy and Confidentiality; 2.05 Consultation; and 6.04 Social and Political Action.



### *Action*

17. How can Stephanie respond to Rebecca in a way that honors Rebecca's view of divorce, her church's view of divorce, and Stephanie's own view of divorce?

Stephanie must acknowledge that Rebecca is deeply hurt by the response she receives from her church with regard to her decision to file for divorce. She must be careful to recognize this hurt and not rush to criticize the church or its beliefs about divorce. She must also recognize that Rebecca may feel conflicted about the decision she has made based on this response from her church. It would be appropriate for Stephanie to explore what Rebecca's underlying feelings are about this response in light of her beliefs about divorce. Stephanie must remember the ethical standard of self-determination and allow Rebecca to make her own decisions in this situation.

18. What alternatives does Rebecca have in this situation? How could Stephanie present those alternatives in an appropriate manner?

In addition to the option of divorce, Rebecca could be presented with the option of staying in a shelter or transitional housing while she works toward reconciliation with her husband, if he is willing to make changes. Stephanie could provide additional information on services available to Rebecca, her husband, and her children.

Stephanie could present these alternatives by thoroughly exploring the possible benefits and risks involved with these options, thereby helping Rebecca to make an informed decision.

19. What issues must Stephanie address in her next encounter with Rebecca?

Stephanie must be prepared to assist Rebecca both by attending to very practical needs as well as the emotional responses she is having in this crisis situation. With regard to her practical needs, Stephanie needs to first address the family's immediate need for safety. Next, she must consider and present options for housing, perhaps through a shelter program, and begin to explore options for Rebecca to secure income to support herself and her sons.

In addition, Stephanie needs to assist Rebecca through this emotional crisis. When women decide to leave a battering situation, practical needs assume a high priority but emotional needs emerge next (James, 2008): "It is not uncommon for a woman to be so busy getting her act together that her emotional reactions are delayed" (p. 281). James (2008) goes on to suggest that the crisis worker should prepare the client for the emotional impact of their decision to leave. The worker and client should also discuss how the client might feel or respond as these emotions play out and how the worker can provide resources to the client if and when needed. In this case, Rebecca's decision to file for divorce resulted in the loss of her employment and separation from a support network at her church. In addition, the changing relationship and loss of her spouse and the father of her children will have an emotional impact on both Rebecca and her sons.

### *Reflection*

20. What beliefs do you have about staying in a marriage where domestic violence is occurring? Do your beliefs change if children are a part of the family?

21. How will you deal with situations when your beliefs as a social worker do not align with your client's beliefs or the beliefs of the systems they are involved with?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. In combination with the case, have students read the "point of view" article listed in the print reference section (Sider, 2000). Use the sections on Capacity-Building: Increasing and Strengthening Holistic Faith Based Organizations; Education; and Funding from this "point of view" article to discuss benefits and risks of faith-based organizations providing domestic violence services. Additional questions to discuss with students may include: What ethical dilemmas do faith-based organizations face when providing domestic violence services, or more generally social services? Do these risks outweigh the benefits? (Should faith-based organizations not provide these services?) What role should faith-based organizations take in developing partnerships with congregations (e.g., funding, education)?
2. Conduct an analysis of the current domestic abuse laws in Minnesota. How do these laws compare to the current laws in a student's state of origin or the state where they will live and work in the future? Do any of these state laws widely differ? What implications will this have for clients in these states? If a number of differences exist, see if there are ways students can get involved in advocating for policy change at the state level. In many states this information is available on-line.
3. Following analysis of the issues in this case, design a role-play that begins where the case ends: "I am on my way to see you. We need to talk about this situation." Rebecca was pulling into an open spot right outside the main door. In a matter of minutes she would be in Stephanie's office looking for answers to deal with the situation."

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

#### *Print*

Adams, C., & Fortune, M. (1995). *Violence against women and children: A Christian theological source book*. New York: Continuum Publishing Company.

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- Kirst-Ashman, K. K., & Hull, G. H. (2002). *Understanding generalist practice* (3<sup>rd</sup> ed.). Pacific Grove, CA: Brooks & Cole.
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# **Birthfather's Right?: Teaching Notes**

*Jennifer L. Fahy*

## **Case Synopsis**

Gretchen Fuller, a new MSW supervisor for Trinity Family Services in Ohio, received a referral from the local prison that a pregnant inmate, Keisha Brown, was interested in adoption. Gretchen worked with Keisha to initiate the adoption process and choose a prospective adoptive family. Keisha identified Jamal as the birthfather, but Jamal did not respond to repeated contacts by either Keisha or Gretchen. Just days before the baby's birth, however, Jamal contacted Gretchen, questioning both his paternity and Keisha's decision about adoption. After Gretchen arranged a paternity test which returned positive, Jamal agreed to fill out termination of parental rights (TPR) paperwork. After signing the crucial paperwork, an agitated Jamal stopped during the last supplemental form and left the meeting without taking back his signed TPR documents. One day before the court date to terminate Keisha and Jamal's parental rights, Jamal called Gretchen, saying he was not sure about the adoption. Keisha wanted the child to go to her chosen adoptive family and the baby, already in a receiving home, needed to go shortly to a permanent placement, either with the pre-adoptive family or to the foster care system. With the court date scheduled for the following day, Gretchen had to decide what to do.

## **Intended Case Use**

Written for a BSW level (and MSW level) social work course(s) in child welfare, or practice with families, it may also be used for specialized instruction on religion/spirituality in social work practice, policy, and ethics or, more generally, for instruction on social work direct practice, family treatment, or case management.

## **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn:

1. Challenges and strategies when working with clients in a restricted setting such as a prison.
2. Contrasting perspectives on the adoption experience from the viewpoint of birthmothers, birthfathers, relatives of the birth parents, prospective adoptive parents, and social worker(s).

3. Cultural, religious, and moral beliefs about adoption and how these might impact the client and worker relationship.
4. Differing perspectives on and ethical dilemmas involving interracial adoption.
5. Ethical dilemmas that arise due to the structure of adoption agencies (e.g., one agency representing both the birth parents and adoptive parents).
6. Moral and cultural beliefs embodied in state and federal adoption policy, especially related to the rights of birthfathers in the adoption process.
7. Ways that religious commonalities and differences between clients and practitioners may influence their relationships and social work practice.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What was Gretchen's role in this case? What experience, background, or knowledge did Gretchen bring to her work?

Gretchen was performing the role of a birthparent counselor for Trinity Family Services' infant domestic adoption program. In this role, Gretchen informed the birth parents about the adoption process, identified a prospective adoptive family for Keisha to approve, counseled Keisha through the emotional process of placing a child for adoption, and completed the necessary court actions (e.g., preparing Keisha and Jamal for termination of parental rights). She was the supervisor for the Cincinnati and Columbus Ohio Trinity Family Services' offices and was taking on overflow cases from an unfilled birthparent counselor position.

Gretchen had a bachelor's degree from a small Christian liberal arts college and a master's degree in social work from a large, secular university. Her current position at Trinity Family Services as a supervisor was her first full-time social work position. Gretchen had only been in her current position seven months and was experiencing a high level of stress. Gretchen had a Christian worldview, enjoyed working with children and families, and had a particular appreciation for adoption because she had relatives who were adopted.

2. What do we know about Trinity Family Services and their mission?

Trinity Family Services was a not-for-profit, pro-life, Christian adoption and family services agency with offices in several states. In Ohio, Trinity Family Services had offices in Toledo, Cleveland, Cincinnati, and Columbus. The Cincinnati office had seven employees and the Columbus office had four employees with one supervisor managing both offices. In Ohio, Trinity Family Services' programs included a domestic infant adoption program, international adoption, special needs adoption, crisis pregnancy counseling services, and an abstinence education program. Trinity Family Services' mission was to show God's love by providing services to improve the lives of children and families.

3. What are the key elements of the case?

Gretchen, a supervisor for Trinity Family Services of Ohio, was contacted by Cindy Novak, a social worker at Cincinnati Women's Reformatory, because an inmate was interested in adoption. Gretchen met with the prisoner, Keisha Brown, who decided that adoption was her best option given her present circumstances.

Keisha was a young African American woman who had been transferred from Cleveland to a prison across the state (in Cincinnati) because she walked off the job site of a prison work release program. Keisha already had one son who lived with her grandmother. Keisha became pregnant the previous summer while dating Jamal, whom she was no longer seeing. Keisha could not care for the child because she was in prison and stated that no one else in her family could care for the child. She reportedly made repeated attempts to contact Jamal about the child by letter but with no success. Gretchen identified an adoptive family based on Keisha's wishes, Ken and Evelyn Anderson, who Keisha approved to adopt her child. When Keisha informed her grandmother, Josephine, that she had given birth and was going to place her child for adoption, her grandmother was upset. However, Josephine could not care the child herself or find another relative to care for the child.

Late in the case, the alleged birthfather, Jamal Pinkney, a young African American man, contacted Gretchen. He was opposed to placing the child for adoption. Jamal did not identify himself or his family as a resource for the child, but expressed a desire for Keisha or Keisha's family to keep the child. Jamal also initially claimed he was not the father and Gretchen arranged a paternity test, which came back positive. After this, Jamal agreed to meet with Gretchen to fill out paperwork to voluntarily terminate his parental rights. Jamal signed all the required paperwork, but became upset during the meeting and did not finish the rest of the supplemental paperwork. The day before the court hearing to terminate his and Keisha's parental rights, Jamal called Gretchen and informed her that he was not sure about the adoption. Gretchen must decide whether or not to cancel the court date.

4. What personal and cultural beliefs did Keisha and Jamal have about adoption?

Keisha initially indicated that adoption was her last option. When she could not find any relative to care for the child, she later indicated that adoption was the best option for the child. Keisha desired a stable, two-parent family for her child and one that would maintain connections to her African American culture. She chose a family that already had one mixed race adoptive child and other African American relatives.



Jamal had a strong reaction to learning that Keisha was planning to place their child for adoption. He stated that he was never going to have a child who was adopted and that 'African Americans don't just give their kids away.' Indeed, Jamal's comments reflect a major controversy in adoptions about the appropriateness of interracial placements.

5. What moral and cultural beliefs do Trinity Family Services and Gretchen have about adoption?

As a pro-life, not-for-profit, Christian agency, Trinity Family Services espoused the belief that abortion is not an acceptable option to unplanned pregnancy and that adoption provides a positive solution to unplanned pregnancy for children and birth parents. Trinity's requirements for prospective adoptive families (e.g., Christian couples married a minimum of two years) underscored the agency's value that the ideal home is a two-parent home with the couple bound together through legal marriage, a marriage that has evidence of stability, and caregivers who demonstrate a Christian worldview.

Furthermore, Gretchen had a positive view about adoption based on her personal experience with family members who had successful adoptions and on her Christian worldview, which fueled a desire to help the "needy, widow, and the orphan."

#### *Analysis*

6. What challenges did Gretchen face while trying to fulfill both her supervisor and birthparent counselor roles at Trinity Family Services?

Gretchen was working long hours trying to fulfill the duties of her supervisor role while providing competent service to overflow birthparent counselor clients. This high stress situation put her in danger of burnout and may have compromised her ability to do both jobs well. Gretchen had limited direct practice experience for either the counselor or supervisor roles. Further, the case does not indicate whether she was receiving adequate supervisory support on the overflow cases.

7. How did Keisha's imprisonment affect the dynamics of the case?

Because of her incarceration, Keisha was unable to care for her child and therefore had to make an alternative care plan. She had limited ability to communicate with Jamal, her relatives, and with Gretchen. The fact that she was incarcerated in Cincinnati while her family and Jamal resided in Cleveland compounded the problem. Because Keisha could only contact Jamal by mail, she could not discuss the issues with him at length or in a timely manner. The one phone call arranged for Keisha with Jamal was brief and not private. Finally, while Keisha had greater access to Gretchen, it was still quite limited. All of these limitations on Keisha's ability to communicate with Jamal and Josephine put Gretchen in the unfortunate position of go-between for the case participants, and that probably contributed to the emotional tension that Jamal, Josephine, and Keisha experienced.

8. What tensions exist for and among the birth parents, other family members, foster parents, and social workers in this case?

The adoption process is often filled with tensions because it involves a permanent change of custody and care from one family to another. Specifically, there may be tension between what the birthmother and birthfather want for the child. In this case, while Keisha felt that adoption was her best option given her circumstances, Jamal pressed her to keep the child. There may also be tensions between birth family members. In this case, the grandmother did not approve of Keisha placing the child up for adoption, but she was unable to care of the child or identify another family member to do so.

Prospective foster/adoptive parents add another dynamic because they hope to adopt, but fear issues that may hamper or impede the adoption. In this case, the Andersons had experienced difficulties in their previous adoption with an uncooperative birthfather and expressed their concerns about this case.

Gretchen was torn between representing Keisha's wishes, handling Josephine and Jamal's opposition, supporting the Anderson's hopes for adoption, and her own opinions about what was best for the child. Facing an unknown foster care placement or a stable, two-parent Christian home, Gretchen's personal beliefs may influence her actions to postpone or continue with the court date.

9. Who was Gretchen's client in this case?

Because Gretchen was involved with so many case participants, it may be difficult to identify Gretchen's client. Gretchen's primary client was Keisha. Gretchen worked with other case participants such as Josephine and Jamal to identify possible resources to better inform Keisha's decision, but ultimately Gretchen's role was to advocate for Keisha. Although Keisha desired to place her child for adoption, as the identified father, Jamal also had legal standing. As a result, Gretchen had to make reasonable efforts to contact Jamal, inform him of his rights, and gain his informed consent to voluntarily terminate his parental rights. However, Gretchen performed these actions to achieve Keisha's goal for the case, not Jamal's. The fact that Keisha was Gretchen's client was the primary determinant of who Gretchen interacted with and for what purpose.

10. Who was/were Trinity Family Services' client(s)? How did this affect the dynamics of the adoption?

In many adoption cases, one agency represents both the birth parents and the adoptive family. In these situations, one social worker is assigned to assist the birth parents through the adoption process while another social worker licenses and works with the prospective adoptive parents. The bulk of the adoption fees are paid to the agency by the prospective adoptive parents. The agency uses these fees to pay for the birthparent counselor and adoption worker positions, receiving homes, and the costs of licensing adoptive families. In this case, Gretchen was representing the birthmother, Keisha, while adoption workers at St. Mary's Social Services and Trinity Family Services were jointly representing the adoptive family through an inter-agency contract. Agencies usually assign separate social workers to the birthparent counselor and adoption worker positions so as to avoid the bias workers could feel if they were representing multiple parties simultaneously.

Babb (1999) argues that the structure of adoption agencies representing both parties produces possibilities for unethical conduct. As most of an adoption agency's operating fees come from adoptive parents, it may be biased in favor of the adoptive family and in favor of completing adoptions.

11. In this situation, who represented the unborn child?

The legal guardians of the child, its biological parents, have the legal right and responsibility to represent their unborn child. For biological mothers, the very fact that they conceived, carried, and birthed a child establishes their legal rights and responsibilities for that child. It is more complicated for fathers. State laws vary regarding how paternity is established and the man's rights are dependent on marital status and whether, when, and how long the parents ever cohabitate.

In this situation, when the biological mother is unwed and not living with the biological father, she is asked to name any alleged biological fathers. All alleged fathers must be contacted and alerted of the adoption proceedings. Based on evidence provided by the alleged father (testimony and/or blood test) a court can determine paternity (i.e., adjudicated father). An adjudicated father has the same legal rights and responsibilities to represent the child as the mother. In this case, both the biological parents have been identified, Keisha and Jamal (through his blood test), and they both have the legal right to determine the placement of the child. To complete the adoption process, parental rights of both parents must be terminated.

In an adoption, the judge has the important task of determining the best interests of the child and makes the final decision regarding the legal guardianship of the child. Finally, in most adoption cases, a guardian ad litem is appointed to represent the best interests of the child. The guardian ad litem may be a lawyer or trained layperson who has interviewed the parties to the case and is called upon to testify at the adoption proceedings about whether the adoption is in the child's best interests.

12. [If students have been assigned a reading on parental rights:] What, if any, legal rights and responsibilities did Jamal have as a birthfather?

While legal, political, and cultural practices relating to fathers' rights and responsibilities to their children have shifted over the past several decades, birthfathers' rights in adoption cases seem to have lagged behind. Up until the 1972 Supreme Court decision in the case of *Stanley v. Illinois*, states could enact laws which held that the children of unwed fathers became wards of the state upon the death of the mother (Adoption History Project, 2010). Pertman (2000) argues that birthfathers are all too often looked upon as a nuisance rather than as a potential active participant in adoption planning or as an alternative placement resource to adoption. Birthfathers often have a more difficult time than birthmothers gaining legal rights to their children. Birthmothers may choose to hide the pregnancy from the father. If the father was not married to or living with the mother, he must take steps to determine his paternity and show evidence that he wants to care for the child in order to achieve legal custody.

However, several high profile court cases in the 1990s, including the Baby Jessica case in Idaho, the Baby Richard case in Illinois, and the David Keene Leavitt Supreme Court case, have brought increased attention to laws, policy and practice related to birthfathers' rights in adoption cases (Pertman, 2000). In response, states have established more stringent protocols for contacting and notifying alleged birthfathers of their rights and social workers are trained to actively include birthfathers in the adoption process. Nonetheless, it can be difficult for birthfathers to gather needed information about their rights and they may feel they have no advocates in the adoption process. In this case, some of the tension experienced by Jamal may be due to his late involvement in the adoption process and lack of inclusion in choosing the adoptive family.

Jamal had legal rights and responsibilities to the child due to his established paternity (via blood test). Jamal had the legal right to be involved in all placement decisions for the child and the right to take custody of the child himself. If Jamal did not terminate his rights for the adoption and the child was placed with the mother, a relative of the mother, or in the foster care system, he could have been ordered by the court to pay child support.

13. What, if any, legal rights and responsibilities do other members of the child's extended family (e.g., Josephine) have as biological relatives?

Biological relatives (unless they are appointed legal guardians by the court) have no legal rights and responsibilities to the child. They can express their wishes to the legal guardians (in this case, the biological parents), guardian ad litem, and/or the judge but that is the extent of their influence.

14. When Jamal expressed reservations about adoption, was he opposed to adoption, in general, or to interracial adoption, in particular? What were Keisha's views on interracial adoption? What are the pros and cons of interracial adoption?

It seems clear that Jamal was opposed to adoption, but his views on interracial adoption are less clear. His statement, "African Americans just don't do adoption. We take care of our own," implies that he believes people of his race should not put their children up for adoption. Keisha stated that she would prefer that the adoptive family be African American, but Gretchen was unable to find an African American family looking to adopt. The lack of minority adoptive families in Trinity Family Services' program may point to systemic issues in family recruitment for the agency. Scholars point to numerous historical and systemic issues that have contributed to an over-representation of African American children in foster and adoptive placements and a high proportion of Caucasian families looking to adopt (Howe, 1999).

One positive outcome of interracial adoptions is that they allow minority children to move to permanent living situations quickly. In addition, studies have not found that interracial adoption itself produces psychological, behavioral, or social maladjustment problems in children (Smith, McRoy, Freundlich & Kroll, 2008). Further, when adoptive parents' have positive attitudes and behaviors related to racial socialization, it can positively impact interracially adopted children's' outcomes (Vonk, 2001).

However, some studies have shown that minority children who are adopted by Caucasian parents have increased difficulties with racial and cultural identity and lower self-esteem (Smith, McRoy, Freundlich & Kroll, 2008). They report being uncomfortable with their appearance and feel "different" than their adoptive families, may attempt to distance themselves from those of their ethnicity, or feel ashamed of their origins (Vonk, 2001). Critics argue that adoptive parents from a different culture are unable to transmit ideals and skills that African American children receive from interaction with their community. One such key life skill is coping with discrimination (Smith, McRoy, Freundlich & Kroll, 2008).

## *Action*

15. With a court hearing scheduled for the next day, how should Gretchen respond? What are the pros and cons of these options and how do they affect the participants?

Gretchen can postpone or proceed with the imminent court date. Before deciding, she should consider the pros and cons of these alternatives, and how they may affect members of the adoption triad.

Option 1: Postpone the court date. Postponing the court date could give Jamal the time he needs to resolve his feelings about the adoption. Given more time, Jamal may be able to develop a plan for the child so that the child could be with him or one of his biological relatives. If court is postponed and Jamal still chooses to terminate his parental rights at a later date, he would at least have been given the opportunity to be a more active participant in the adoption, possibly making the adoption less emotionally stressful for himself and Keisha. In addition, Gretchen and Trinity Family Services could be certain that their actions were above reproach if they took more time to resolve any potential issues with Jamal, and this may reduce the risk of future placement disruption for the adoptive family (and their anxiety related to such risk).

There are also cons to postponing or canceling the court date. This option would mean that more time would pass until there is case resolution. Court dates can be difficult to re-schedule. Most importantly, Trinity Family Services cannot hold a baby indefinitely in a receiving home, especially if it is uncertain whether the child is going to be adopted. In general, a baby can only stay in a receiving home for approximately one month, and if the baby is not adopted, he or she must go into the foster care system in the area serving the biological parent's place of residence. Once in the foster care system, Keisha would likely lose her ability to choose which family would be taking care of her child and may not be able to facilitate an adoption at a later date. Postponing the court date also means more time that the baby is in limbo and not in a permanent, stable living situation. This would also be difficult for Ken and Evelyn Anderson who are anxiously waiting to adopt the child.

Option 2: Proceed with the court date. There are several pros to proceeding with the court date. There may be a quicker case resolution if the judge proceeds to terminate both of the birth parents' parental rights. This would achieve the goals of Gretchen's client, Keisha, who wants her baby to be adopted by the family of her choosing. The baby would be able to move into a permanent, stable living situation, and Ken and Evelyn Anderson would be relieved and excited to continue the adoption process. Throughout the case, Jamal has not expressed that he or one of his family members could care for the child, so it is unlikely that delaying action will change this situation. Jamal has been informed of the court date and if he chooses, he can call the court or appear and contest the termination of his parental rights. If he does not do so, then the case will be resolved.

There are also several cons to proceeding with the court date. First, if Gretchen did not cancel and had to testify in court the next day, she would face an ethical dilemma of how to present the facts of the case to the judge. She could submit the paperwork without informing the judge of Jamal's reservations about the adoption, but that could be considered lack of full disclosure. Later, this could have potential repercussions for Gretchen and Trinity Family Services and their relationships with the court. If Gretchen reports fully, the judge may or may not choose to postpone the court hearing in order to gather further information from Jamal. If the judge terminates Jamal's parental rights in the scheduled hearing, Jamal may have the potential to appeal at a later date. State laws require that

adults are fully informed and understand their alternatives to terminating their parental rights (Evan B. Donaldson Adoption Institute, 2007). If Jamal appealed, this could be emotionally taxing on Keisha and her family and the Andersons. If Jamal won on appeal, this would require a difficult placement disruption for the Andersons and the baby. It would also reflect poorly on the reputation of Trinity Family Services.

16. What other resources could Gretchen call upon in this situation?

Gretchen could have solicited additional counsel from her supervisor and/or seasoned co-workers to help her make the most appropriate decision given the situation. Adoption agencies should have legal counsel to represent the agency at termination of parental rights hearings who could have provided a legal analysis of the situation and the repercussions of Gretchen's decision. In a similar vein, Gretchen could have consulted Ohio state statutes to confirm that the necessary steps for termination of parental rights were being taken. In addition, some states require legal representation, known as a guardian ad litem, to provide an unbiased source of information representing the best interests of the child in the adoption case. If Gretchen had facilitated communication between a guardian ad litem and Jamal, Gretchen would have known that Jamal's concerns had been heard by another party, so the burden of when to proceed with court would not have fallen on Gretchen alone.

17. What would you do in this situation? Why? What kind of impact does your choice have on the different participants in this case? Are there any potential repercussions for Trinity Family Services?

### *Reflection*

18. Do you have any cultural, religious, or moral beliefs related to unplanned pregnancy, birthfathers, family structure, or adoption? How might these beliefs affect your practice?

19. What rights do you think that birthfathers should have in the adoption process? Does it depend on facts of the situation such as the birthparents' living situation(s), marital status, or individual beliefs? What role, if any, should maternal or paternal extended-family members have in the adoption process?

### **Teaching Suggestions**

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. In advance of the class discussion, require students to research contemporary legal issues related to termination of parental rights (TPR), in general, or birthfathers' rights, in particular. Caution students about the variety of perspectives available on the Internet. Alternately, assign students to read an article on TPR (e.g., Evan B. Donaldson Adoption Institute, 2007).

2. In advance of the class discussion, require students to research issues related to interracial adoption. Alternately, assign students to read an article on interracial adoption (e.g., Morrison, 2004; Smith, McRoy, Freundlich & Kroll, 2008)
3. For their home states, have students research and write a policy brief that describes: (1) the changing legal, political, and cultural landscape surrounding birthfathers' rights in the adoption process, (2) reasons why this shift is occurring, and (3) their argument as to what they believe the policy should be and why.
4. Direct students to research their home state's laws regarding the procedure and grounds for termination of parental rights (TPR). Have students differentiate between voluntary and involuntary TPR and between the rights of the birthmother and birthfather in the TPR process.
5. Divide students into two groups and perform a mock trial. Using the background information provided in the case, have one side argue for Jamal's parental rights to be terminated and the other side for Jamal's parental rights not to be terminated. Instructors may also direct students to research Ohio's state statutes and/or policies to inform their arguments.

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

#### *Print*

- Babb, L. A. (1999). *Ethics in American adoption*. Westport, CT: Bergin & Garvey.
- Baden, A. L. (2007). Identity, psychological adjustment, culture and race: Issues for transracial adoptees and the cultural-racial identity model. In R. A. Javier, A. L. Baden, F. A. Biafurat & H. Carmachio-Gingerich (Eds.), *Handbook of adoption: Implications for researchers, practitioners, and families* (pp. 359-378). Thousand Oaks, CA: Sage Publications.
- Belanger, K., Copeland, S., & Cheung, M. (2008). The role of faith in adoption: Achieving positive adoption outcomes for African American children. *Child Welfare, 87*(2), 99-123.
- Burrow, A. L., & Finley, G. E. (2001). Issues in transracial adoption and foster care. *Adoption Quarterly, 5*(2), 1-4.
- Fenster, J. (2002). Transracial adoption in black and white: A survey of social worker attitudes. *Adoption Quarterly, 5*(4), 33-58.
- Finley, G. E. (2002). Birth father rights and legislative interventions. *Adoption Quarterly, 6*(1), 1-5.

- Howe, R. A. (1999). Adoption laws and practices in 2000: Serving whose interests? *Family Law Quarterly*, 33(3), 677-689.
- Jones, S. (2007). State intervention in the family: Child protective proceedings and termination of parental rights. *Columbia Journal of Law & Social Problems*, 40(4), 485-493.
- Oren, L. (2006). Thwarted fathers or pop-up pops?: How to determine when putative fathers can block the adoption of their newborn children. *Family Law Quarterly*, 40(2), 153-190.
- Pertman, A. (2000). *Adoption nation: How the adoption revolution is transforming America*. New York: Basic Books.
- Quiroz, A. P. (2010). Transcultural adoptive parents: Passing the ethnic litmus test and engaging diversity. *Race, Gender & Class*, 17(1/2), 194-205.
- Vonk, M. E. (2001). Cultural competence for transracial adoptive parents. *Social Work*, 46(3), 246-255.
- Williams, M. E. (2006). *Adoption: Opposing viewpoints*. Detroit, MI: Greenhaven Press.

#### **Electronic**

- Adoption.com. (2010). *Birthfather*. Retrieved August 9, 2010, from <http://encyclopedia.adoption.com/entry/birthfather/61/1.html>
- Adoption History Project. (2007). *Stanley v. Illinois, 1972*. Retrieved on July 30, 2010, from <http://darkwing.uoregon.edu/~adoption/archive/StanleyvIL.htm>
- Child Welfare League of America. (2000). *CWLA Standards of Excellence for Adoption Services*. Retrieved on July 30, 2010, from <http://www.cwla.org/programs/standards/cwsstandardsadoption.htm>
- Child Welfare Information Gateway. (n.d.). *Laws related to adoption*. Retrieved on July 30, 2010, from <http://www.childwelfare.gov/adoption/laws/>
- Evan B. Donaldson Adoption Institute. (2007). *Safeguarding the rights and well-being of birthparents in the adoption process*. Retrieved on August 9, 2010, from [http://www.adoptioninstitute.org/research/2006\\_11\\_birthparent\\_wellbeing.php](http://www.adoptioninstitute.org/research/2006_11_birthparent_wellbeing.php)
- Morrison, A. (2004). Transracial adoption: The pros and cons and the parents' perspective. *Harvard BlackLetter Law Journal*, 20, 163-202. Retrieved August 9, 2010, from [www.law.harvard.edu/students/orgs/blj/vol20/morrison.pdf](http://www.law.harvard.edu/students/orgs/blj/vol20/morrison.pdf)
- National Council for Adoption. (2007). *Adoption factbook IV*. Retrieved on July 30, 2010, from <https://www.adoptioncouncil.org/publications/adoption-factbook.html>



National Resource Center for Permanency and Family Connections. (2010).  
*Adoption*. Retrieved on July 30, 2010, from [http://www.hunter.cuny.edu/socwork/nrcfcpp/info\\_services/adoption.html](http://www.hunter.cuny.edu/socwork/nrcfcpp/info_services/adoption.html)  
[An extensive listing of on-line adoption resources.]

Smith, S., McRoy, R., Freundlich, M., & Kroll, J. (2008). Finding families for African American children: The role of race & law in adoption from foster care. New York: Evan B. Donaldson Institute. Retrieved August 9, 2010, from [http://www.adoptioninstitute.org/research/2008\\_05\\_mepa.php](http://www.adoptioninstitute.org/research/2008_05_mepa.php)

# The Mental Health and Spirituality Workshop: Teaching Notes

*Carrie Yocum and Terry A. Wolfer*

## Case Synopsis

Kolap Chonn White facilitated groups as a Rehabilitation Practitioner for a public mental health facility for three months before meeting consumer Cathy Crider. A born-again Christian, Kolap's religious worldview was the foundation for her personal and professional life. She and Cathy quickly bonded over issues related to culture and gender as Cathy participated in Kolap's groups. When Cathy later approached her privately with frustrations about the workshop, Kolap was unsure how to respond, feeling the constraints of both professional ethics and agency policies.

## Intended Case Use

Written for undergraduate or graduate level social work courses in diversity, practice, ethics, or policy, it may also be used for specialized instruction on religion/spirituality in social work practice or, more generally, for instruction on social work direct practice, mental health treatment, or case management.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Increase their awareness and understanding about immigration and immigrant cultures, in general, and in Asian culture, in particular.
2. Increase their self-awareness about how their own culture impacts their practice.
3. Explore and evaluate their beliefs about religious and spiritual themes in social work practice.
4. Evaluate how their own beliefs about gender roles impact their practice.
5. Identify the relationship between culture and faith in social work practice.
6. Recognize the presence of generational acculturation.

7. Explain the importance of personal and professional boundaries in helping relationships, and the risks and benefits of worker self-disclosure with clients.
8. Define and construct methods for evaluating program goals.
9. Distinguish between professionals' specialized roles in agency settings.
10. Summarize their own experiences with marginalization as both a resource and limitation in practice.
11. Explain the relationship between ethics, practice, and policies and procedures.
12. Analyze the influence of personal and family history on the choice of career.
13. Summarize the influence of historical contexts on practice decisions.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What was the structure of the IPRT Program and what services did it provide?

The IPRT had well-defined roles for both the Rehab Practitioners (RPs) who conducted workshops and the therapists who addressed mental health issues individually with consumers. Consumers worked with qualified mental health professionals and rehab practitioners to develop an individualized service plan for each consumer that identified the skills needs, how best to learn those skills, and who would provide the services, entitlements and support. In consultation with their professionals, individual consumers decided on the goal, the pathway and the pace.

During the consumer's initial involvement in the program, IPRT services were provided in three phases. Consumers chose a goal in the first phase, achieved it in the second, and maintained it in the third. Consumers

participated in the phase groups simultaneously with other topical workshops. These workshops might have focused on skill-building topics such as anger management, self-esteem, positive thinking, women's and men's issues, computer practice, goal setting workshops, mental health and wellness or other task or therapeutic groups.

Consumers usually spent six months to two years in the program, depending on how rapidly they achieved their individual goals. Typically, they participated in groups five hours per day, three days per week.

2. What were the religious backgrounds of Kolap's colleagues? How might these have influenced the team and their treatment approaches?

Kolap's team had different spiritual and religious worldviews. These included a "strong Catholic," a former Catholic with Buddhist beliefs, another Christian, and a self-described Pagan.

Their religious backgrounds and faith perspectives may have influenced their responses to client concerns such as gender roles, submission, forgiveness, self-esteem, powerlessness, parental roles, discrimination, and cultural norms and expectations.

3. What do we learn about Cambodian culture?

Cambodian culture embodies clearly delineated gender roles, strong parental roles, a strong Buddhist faith, and a close-knit family that gives honor to the elderly and remains connected to extended family. Education is valued, but generally exclusive to those who are wealthier.

4. What is the relationship between "Cambodian," "Khmer" and the "Khmer Rouge"?

Cambodians are residents of Cambodia, a country in Southeast Asia whose capital is Phnom Penh. Khmer is the language and culture of a subset of the Cambodian population. The Khmer Rouge is the Cambodian Communist political party.

### Analysis

5. Kolap had the autonomy to develop workshops of her own choice. What are the risks and benefits of developing religious workshops so directly?

**Risks.** Social workers are committed to client-centered values such as self-determination, informed consent, and well-being. The principles of choice and knowledge in decision-making reflect the nature of social work which is to empower others. From a Christian perspective, sharing the love of Christ with those who are hurting is not just a desire, but also a commandment. It may have been tempting for Kolap to try to persuade consumers, either explicitly or implicitly, to accept her religious perspectives. As an authority figure working with emotionally vulnerable consumers, she thus risked (the perception of) spiritual abuse, exploitation, or coercion.

**Benefits.** The agency did not seem to avoid difficult or controversial topics and did seem to support the RP's efforts to design workshops around the needs of their consumers and based on their own areas of expertise and interest.

The trend had been toward including content of a "spiritual" nature in

assessment and in therapy in an effort to work with consumers holistically. The IPRT Program seems to have recognized and supported the need for content of a spiritual nature, which was to the benefit of its consumers. Furthermore, consumers may have wanted avenues to discuss spiritual issues more directly and offering a workshop communicated a validation of that part of their experience.

Kolap's Christian faith provided a foundation for discussing spiritual issues with clients who struggle to understand their own faith issues. The significance of her spiritual worldview was evident in multiple areas of Kolap's life, including her missions work, her choice of career, and her choice of workshop topics (both those offered and those refused). She was interested in discussing faith-related concerns that consumers presented in group.

6. What were the checks and balances provided by the structure of the program and the various perspectives that were offered by the program staff?

Consumers had individual counseling with a therapist and the choice of multiple workshops provided by the various Rehabilitation Practitioners. Rehabilitation Practitioners guided consumers in their selection of workshops based on each consumer's individual needs. Consumers participated in workshops as part of the program, but had choice in the ones they attend and the RPs who provide them. Workshops were intensive, but time limited. Workshop topics were approved by the program supervisor.

Team members had different spiritual and religious worldviews. As noted above, these included a self-described Pagan, a strong Catholic, a Buddhist, and another Christian. Consequently, various worldviews are available in the IPRT Program.

7. What is transference? Countertransference? Is there evidence for transference or countertransference in the relationship between Kolap and Cathy? How can Kolap manage these?

A term originating with psychoanalytic theory, transference occurs when emotional reactions that clients experienced with key figures from their past are attributed to current relationships. The client "transfers" feelings from one individual to another. Similarly, countertransference occurs when emotional reactions are transferred from key figures in the therapist's past to the client.

Kolap can manage any transference and countertransference by first recognizing what transference and countertransference are and that they occur, in varying degrees, in most helping relationships. She should use supervision or consultation to discuss her feelings and thoughts about the relationship and discuss how constructive or destructive countertransference might be. She should also use supervision to discuss client dynamics that are highlighted by the countertransference and assist the client in changing patterns of behavior related to key figures from their past. Finally, understanding that transference is an ethical issue and discussing in supervision the distinction between what the client's "problem" is and what her own "problem" is (Corey, Corey, & Callanan, 2003) will help Kolap manage these issues.

8. How might submission and forgiveness be defined by those in this case study? What factors may affect these understandings?

Definitions and recognition of spiritual issues such as submission and forgiveness might be influenced by factors including gender, spiritual worldview, cultural traditions, family practices, and psychopathology.

9. How does family and personal history influence a social worker's choice of career and worldview?

Kolap's early personal and family history included experience with trauma, immigration, minority status, prejudice, and discrimination. These experiences no doubt sensitized her to the mistreatment and misfortune of other people, creating an interest in the helping professions that eventually led her to social work. It appears that Kolap's Christian faith supported her interest in helping others.

More recently, Kolap had other experiences and relationships (e.g., in Cambodia, her church, marriage) that shaped her outlook. In some ways, these experiences confirmed and, in other ways, competed with earlier formative experiences. The case identifies several points of tension for her, including questions about whether she could be used by God in social work.

10. Other than licensure, what does someone with a master's degree provide that someone without a master's degree doesn't?

Practitioners with master's degrees presumably have advanced practice skills, supervised professional experience, and specialized skills that address more complex mental health problems. In reality, practitioners' skill levels will vary considerably among individuals based on their personal maturity, life experience, etc. and not simply on educational preparation.

11. What does preference for the word "consumer" say about our culture and view of people? What might be gained or lost in choosing this word over "patient," "client," or other descriptor?

The name chosen to refer to those who receive a service often reflects an agency's philosophy of helping and its perception of the role people play in receiving those services. It may also reflect how the agency attempts to market its services, since some labels are more easily accepted than others. The medical model has influenced references to "patients", "milieu" programs such as twenty-four hour care or custodial care facilities typically refer to "residents", and mental health facilities typically refer to "consumers" or "clients".

12. Is Kolap's reaction at the end of the case consistent with previous information? Why or why not?

Throughout the case, Kolap appears fairly confident and secure as a professional and a Christian. But when Cathy expressed concern at the end of the case, Kolap's questions and self-doubts emerge suddenly and loom large. She was initially concerned that her faith-related disclosures may have been harmful to Cathy. Concerned that these disclosures may have gone too far, she quickly began to wonder whether the spirituality workshop itself was appropriate in a public setting.

Indeed, Kolap may have overstepped a therapeutic boundary with Cathy because of their perceived commonalities and a personal connection. As a result, Kolap may have said more than she originally planned, especially when Cathy expressed interest and asked probing questions. Because she tried to respond with integrity, the conversation led Kolap to disclose her deeply held faith. She may have felt exposed and vulnerable, more than what seems necessary or appropriate in this situation. Furthermore, she may have overreacted to Cathy's comment because these questions and self-doubts lurked beneath the surface.

### *Action*

13. How else could Kolap have responded to Cathy when Cathy said she did not like the workshop? What basic helping or interviewing skills could Kolap have used to respond to Cathy?

Some might perceive her immediate response as accusatory or as a barrier to effective dialogue or problem solving. Basic helping or interviewing skills that she might have selected include paraphrasing and summarizing, reflection of feeling and meaning, the use of encouragers, and probing questions, as well as non-verbals associated with active listening.

Kolap probably overreacted to Cathy because of the questions and self-doubts mentioned above. As a result, she focused on her own concerns and had difficulty attending to Cathy.

14. What resources does Kolap have to draw on to deal with this situation?

Her personal faith, master's-level education, professional experience, a cohesive professional team, supervision, and other group members.

15. What policies must Kolap consider in this situation (and how could these be classified)? How might policy affect this case? What is the relationship between mezzo and micro policy in this case?

Kolap understands the agency's (mezzo) policy delineating the distinct roles of therapists and Rehabilitation Practitioners (RP). As an RP, however, Kolap feels conflicted when Cathy specifically requests her help with a concern raised by Kolap's workshop, but that might be considered more appropriate for Cathy's therapist. There may be competing commitments to her employer and to the well-being of her client. In addition, sometimes social workers must use discretion when evaluating when and why they might violate agency policy for the well-being of their consumers.

16. In general, what is the purpose and function of the supervisory relationship? How could it be useful in helping Kolap understand her relationship with Cathy?

Supervision may be administrative, educational, and, supportive but is not intended to be therapeutic for ethical reasons. Kolap's supervisor may provide administrative information about policies and procedures that dictate Kolap's daily activities, education regarding transference or other issues that help her learn to do her job, and support by listening and helping Kolap adjust to job-related stress (Kadushin, 1992). Kolap may seek out supervision to discuss her perceptions of Cathy and how these perceptions influence her interventions. Kolap may also discuss how she can identify with Cathy, but effectively avoid countertransference. Consequently, Kolap can then promote Cathy's ability to relate to others without stereotypes and avoid the influence of transference herself.

### *Reflection*

17. What would you need to know to be involved in this case? Why?
18. What might be the most challenging aspect of this case for you? Why?

19. What underlying values or assumptions are you making about this case? How are these related to effective social work practice?
20. In what ways would you feel effective in working with this case?
21. What contexts or environmental influences are important to consider when thinking about this case?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Before the class discussion, instructors may assign students to gather additional information related to specific aspects of the case. For example:
  - a. Have students research various Asian cultures, including Cambodian, and report on them in class. Depending on the purpose of the class, the instructor may have them focus on such topics as family structure; the roles of women; or the country's profile, history, economy, culture, daily life, and political activities. Discussion might focus on person-in-environment, needs of immigrant families, social welfare systems, or traditional eastern value systems.
  - b. Using the Internet, students could investigate models of mental health practice and report them to the class. The discussion might focus on the advantages and disadvantages of these models, particularly individual vs. group interventions.
  - c. Have students identify aspects of the Code of Ethics that have a bearing on this particular case. Discuss in class.
  - d. Have students research the concepts of "transference" and "countertransference" and report on ways to manage them in helping professions. Students might also identify aspects of the case that may reflect the presence of transference.
  - e. Students could research and compare various religious perspectives represented in the case (i.e., Plymouth Brethren, Buddhism, paganism, Catholicism), and report them to the class. Discussion may focus on the influence these views might have on the value systems and interactions of the case participants.
2. Before discussing the case, have students create an organizational chart that outlines the structure of the IPRT program. Discuss organizational structure and the influence of policy on direct care worker activities in class.
3. Role play how Kolap could process Cathy's concerns the next time they meet. Have two students play the roles and practice the basic helping skills that could be used such as reflection, encouragers, paraphrasing, probing, etc. The remainder of the class should observe and provide feed-



back. Alternately, have the class role play the workshop participants during a group in which Kolap processes Cathy's concerns.

4. After discussing the case, assign students to construct their own spiritual ecomap, genogram, or lifemap (Hodge, 2000, 2001, 2005) and reflect, either orally or in writing, about what has influenced their personal value system, spiritual development, and career choice.
5. The IPRT was one model to help adults with mental illness stabilize their symptoms and improve their desired living and working roles. After discussing the case, have students investigate evidence-based or research-based models of helping adults with serious or ongoing mental illness. Comparing these models to the IPRT model may be useful to understand theoretical and/or philosophical beliefs about helping. Further comparison may be made against "best practices," or those methods of helping based on a professional's experiences.
6. Either before or after the case discussion, have students compose their own philosophy of helping from their own faith perspective. This might be most useful in an introductory course so that the philosophy can then be revised as students progress through the curriculum. Discussion might then center on exploring Kolap's philosophy and motivations for helping.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### Print

- Borys, D. S., & Pope, K. S. (1989). Dual relationships between therapist and client: A national study of psychologists, psychiatrists, and social workers. *Professional Psychology: Research and Practice, 20*, 185-196.
- Corey, G., Corey, M. S., & Callanan, P. (2003). *Issues and ethics in the helping professions* (6<sup>th</sup> ed.). Pacific Grove, CA: Brooks/Cole.
- Dewane, C. J. (2006). Use of self: A primer revisited. *Clinical Social Work Journal, 34*(4), 543-558.
- Harper, K. V., & Lantz, J. (1996). *Cross-cultural practice: Social work with diverse populations*. Chicago: Lyceum.
- Hodge, D. R. (2000). Spiritual ecomaps: A new diagrammatic tool for assessing marital and family spirituality. *Journal of Marital and Family Therapy, 26*(2), 217-228.
- Hodge, D. R. (2001). Spiritual genograms: A generational approach to assessing spirituality. *Families in Society: The Journal of Contemporary Human Services, 82*(1), 35-48
- Hodge, D. R. (2005). Spiritual lifemaps: A client-centered pictorial instrument for spiritual assessment, planning, and intervention. *Social Work, 50*(1), 77-87.

Hugen, B., & Scales, T. L. (Eds.). (2002). *Christianity and social work: Readings on the integration of Christian faith and social work practice* (2<sup>nd</sup> ed.). Botsford, CT: North American Association of Christians in Social Work.

[This collection of articles deals with a variety of topics related to social work practice and a Christian perspective. Several chapters may be relevant to this decision case including: The Relationship between Beliefs and Values in Social Work Practice: Worldviews Make a Difference (chap. 2); Calling: A Spirituality Model for Social Work Practice (chap. 3); and Spiritual and Religious Dimensions of Mental Illness Recovery Narratives (chap. 12).]

Kadushin, A. (1992). *Supervision in social work* (3rd ed.). New York: Columbia University Press.

Yan, M. C., & Wong, Y-L. R. (2005). Rethinking self-awareness in cultural competence: Toward a dialogic self in cross-cultural social work. *Families in Society: The Journal of Contemporary Social Services*, 86(2), 181-188.

### **Electronic**

Angkor Wat. (2010). *Angkor What?* Retrieved July 23, 2010, from <http://www.angkorwhat.net/>

Asia Society. (2010). *Cambodia*. Retrieved July 23, 2010, from <http://asiasociety.org/countries-history/country-profiles/cambodia>

Asia Society. (2010). *Cambodia: An historical overview*. Retrieved July 23, 2010, from <http://asiasociety.org/countries-history/traditions/cambodia-historical-overview>

Digital Archive of Cambodian Holocaust Survivors. (n.d.). Retrieved July 23, 2010, from <http://www.cybercambodia.com/dachs/index.html>  
[Pictures of the Khmer Rouge regime and holocaust survivors, Cambodian Genocide Justice Act as well as facts about Cambodia.]

Dittmeier, C. (2007). *Charlie Dittmeier's homepage*. Retrieved July 23, 2010, from <http://www.parish-without-borders.net/cditt/index.html>  
[Includes political and social analysis, many photographs of daily life and special events, etiquette, discussion of culture, and discussion of the Catholic Church.]

Library of Congress. (2009). *Cambodia: A country study*. Retrieved July 23, 2010, from <http://lcweb2.loc.gov/frd/cs/khtoc.html>  
[Includes the country's profile, history, society, economy, government and politics, national security, demographic and agricultural tables, glossary and bibliography.]

Smith, M. H. (2008). *Virtual religion index*. Retrieved July 23, 2010, from <http://virtualreligion.net/vri/>

Thursby, G. R. (2010). *Religious worlds*. Retrieved July 23, 2010, from <http://www.religiousworlds.com/index.html>  
[Offers links to sites related to religious programs, religious traditions, research and teaching resources, references, and modern religion.]

# **I'm Not the Church Social Worker!:**

## **Teaching Notes**

*Mary Anne Poe*

### **Case Synopsis**

Sue Stanford, an MSW social worker in a Sunday School class with Carla Rushing at the BCC of Broyton, became involved with Carla and her family for more than a year. Sue was troubled by relations between Carla and some of the church's lay helpers, including small group leader Gloria Gibbs. Carla had finally moved out of the abusive home she had been living in, but now the church and its "helpers" seemed to have replaced her husband's abuse by offering its own brand of control and mistreatment.

### **Intended Case Use**

Written for a BSW or MSW level social work course(s) in values and ethics or congregational social work. It may also be used for specialized instruction on religion/spirituality in social work practice, spiritual abuses, dual relationships, faith communities, lay helpers, social work and clergy relations, and personal and professional boundaries.

### **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the particular course and discussion focus, students will learn:

1. The dynamics and complexities of relationships in abusive families.
2. About congregations as resources for help and the limitations of these resources for social workers and clients.
3. About the potential for abusive relationships in congregational helping (e.g., spiritual, financial, and emotional abuse).
4. How professional ethics inform one's choices and behaviors outside the professional workplace and how to navigate potential ethical dilemmas in these situations.
5. How to use one's professional expertise in congregational settings, both with those needing help and with those in congregational leadership.
6. How to assess congregational structures and culture in order to use one's professional expertise.

7. The complexity of dual relationships in congregations and how to navigate them appropriately.
8. The importance of clients' self determination for overall well-being.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize. For particular purposes, they may need to develop their own additional discussion questions. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts - to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. Who are the participants? What are their formal roles? How did they get involved?

The participants in this case include Carla Rushing, a woman in an abusive relationship with a drug-addicted husband named Rob. She worked as an aide in a sheltered workshop, and had two teen-aged sons from a previous marriage and two preschool-aged sons with her husband, Rob. Carla was involved with her church, especially through a Sunday school class where she met a social worker named Sue, and with the pastor and lay helpers after seeking their help for her marital situation.

Sue Stanford was a masters' prepared social worker and was currently working in a behavioral health agency as director of community education programs. She had worked as a social worker in a congregational setting for ten years prior to moving to Broyton. She met Carla through participation in a Sunday school class. Sue was not very involved in congregational life beyond the Sunday school class.

Rob Rushing was Carla's husband. He was the father of Ben and Jon, their two preschool-aged sons, and had a problem with drug addiction. He had participated in drug treatment programs and had difficulty maintaining employment. He also was involved in the church with Carla.

Steve Parker was the pastor of Broyton Community Church, a conservative, evangelical congregation. The church had about 1500 members. Steve's pastoral philosophy was not to be the counselor in parishioner's personal lives, but to connect them to other resources within the church.

Marsha Baker and Gloria Gibbs were two lay helpers in the congregation. They met and became involved with helping Carla as leaders in a discipleship group about healing hurts from the past. They were appointed by the pastor to oversee the church's help for Carla and Rob.

Mark and Andy were Carla's teen-aged sons.

2. What is the evidence that Carla's relationship with Rob is abusive?

The case reported that Carla did not know much about Rob's employment and finances. He had a drug problem and Carla had told Marsha and Gloria that his drug problem "scares her." The case reports that Carla had described to Sue "an emotionally cruel and controlling relationship" with Rob. Rob called her names and belittled her in front of their children. After Rob left the treatment program prematurely, he continually harassed Carla. The case reported how Carla feared filing for divorce and what Rob's reaction would be. She then contacted The Women's Place, an agency serving the needs of those in domestic violence.

3. What do we know about the church? What beliefs do they hold? How are these beliefs operationalized in this situation?

The church was a large, non-denominational church with conservative, evangelical theology. The church's views on women's roles in marriage and the church were traditional. It had a full range of programs for families and children, such as Sunday school, discipleship groups, women's ministries. Steve Parker was a strong, decisive leader who had been pastor for about twenty years. The church relied on lay leaders to assist with ministries to people in need in the congregation.

The Care Ministry Department provided a variety of services, both within the church and to the larger community. Services provided by the Care Department included financial assistance, material needs such as clothing, food, furniture, appliances, and cars. The church social worker disbursed between \$100,000-120,000 annually to people in need. The church gave \$1,000,000 more to missions each year. Direct services to clients through care planning activities around a variety of presenting issues were offered both by the church social worker and trained volunteers.

4. What services has Carla received from the church?

Carla has participated in Sunday school and discipleship groups. The church pastors and others had also counseled her to marry Rob when she became pregnant. In this case, Carla had participated in a discipleship group about healing hurts from the past. She became associated with Marsha and Gloria who began to help her in her financial and marital distress. The pastor also organized them as a team of lay leaders to work with Carla and Rob through their difficulty. The church paid for Carla and Rob to get marriage counseling and paid for the drug treatment program for Rob. Gloria, one of the discipleship group leaders, found a home for Carla to rent. The Sunday school class offered financial support and helped Carla move into a rental home after she filed bankruptcy. The church bought a car for Carla when hers broke down.

### *Analysis*

5. What aspects of the *NASW Code of Ethics* seem relevant in this case? What does the *NASW Code of Ethics* assert about social work responsibility in the community? Dual relationships? Advocacy? Self-determination? The importance of advocating for non-clients?

The *NASW Code of Ethics* is primarily related to the professional activities of social workers. It sets forth values and principles that should guide any

professional practice. The Code does include, though, a section about the social worker's responsibility to the broader society. This, in effect, suggests that social workers are professionals all the time, not just when they are on the job. The values and principles suggest an overall perspective on life and persons that obligates the social worker to behave according to the Code in all they do.

The Preamble to the Code indicates the social worker's responsibility to "seek to promote the responsiveness of organizations, communities, and other social institutions to the individuals' needs and social problems." Certainly this case suggests an opportunity for Sue to do this. She had occasion to promote more effective and ethical helping patterns in her church environment.

Another important aspect of the Code that might be relevant in this case is the reality of dual relationships. Sue was not Carla's social worker, nor was she the social worker for the church. Her professional knowledge and education could be helpful, but she should be vigilant about how her relationship with Carla develops. Dual relationships are often unavoidable, but the primary responsibility is to "do no harm." Her concern for Carla seemed to be that the "helping" at the church was, in fact, doing harm to Carla. Her ethical responsibility was to protect the vulnerable in this situation.

The Code's principle about human relationships suggests that people should be engaged as "partners in the helping process." The church helpers did not appear to engage Carla in her own care, rather they told her what to do and how. Sue can try to be helpful in her church by modeling a respect for persons that allows them to be empowered and engaged in their own decisions.

Social workers should be advocates for persons, especially those who are being dominated or exploited. Carla was in such a relationship in her marriage. The church relationship had also been developing in a domineering way. Sue's responsibility, according to the Code, seems to require that she be an advocate on her behalf.

6. How has the congregation been helpful to Carla and Rob? Not helpful? How has the congregation done more harm than good? How may the church actually be abusive to Carla?

The congregation had provided significant financial support to Carla and Rob. It has also surrounded her with people who were interested in her well-being. The church and the faith it represented also gave Carla a place with positive programming for her young children. It had made many efforts to be helpful to Carla by attempting very personal engagement in her life. The church connected Carla and Rob to a marriage counselor and facilitated Rob's entry into a drug treatment program.

The "helpers" in the church, though, had overreached in their control of Carla's life decisions. Instead of empowering Carla with support and encouragement, they had begun to make her decisions for her, such as the purchase of a car and insisting that her son work at the church to help pay for it. Carla reported to Sue that Marsha and Gloria had a judgmental tone. They discouraged Carla from seeking help at The Women's Place because it was not a "Christian agency." The lay helpers also did not provide Carla with any sense of privacy in her difficulties. She reported to Sue that "everyone knows all my business." Apparently all the church helpers discussed Carla and Rob's situation together. The persistent controlling, judgmental experience that Carla has with the church could have been classified as a form of abuse. The fact that it was the "Church" that was functioning in this capacity gives one reason to name this spiritual abuse. Carla felt that she had no options but to do as her church leaders said. She needed the financial support.

7. What is the cycle of domestic abuse? Does this case present evidence of this pattern of abuse in the relationship between Carla and Rob? If so, what is the evidence in this case?

The cycle of abuse is usually described in three phases: a period of conflict and frustration building, the explosive event, and a “honeymoon” phase that follows. This case does not clearly reveal the three phases in the relationship that Carla and Rob had. What was evident in this case was a more persistent controlling, harassing manner of Rob toward Carla. The case did not describe any particular explosive events or honeymoon periods. The case described Carla as a woman with a very limited sense of power over her own life. She was subject to doing what she was told, first by Rob, then the church leaders. Rob was described as a bully and as demanding. He harassed Carla and belittled her.

8. What are the forms of abuse that Carla experienced in her marriage?

Carla seemed to have experienced emotional abuse and financial abuse by her husband. She reported to Sue and others that Rob constantly belittled her and called her names. She stated that she was afraid of him, especially as she approached the time to file for divorce. She also was afraid of him when he was using drugs. No indication is given that Rob was physically abusive, but Carla seemed to fear that this could happen. The financial abuse was indicated when Carla reported that she never knew much about Rob’s employment. Also, he had caused the family to become financially unstable to the point of losing the house that Carla had owned prior to her marriage. They had to finally file for bankruptcy because of his financial irresponsibility.

9. How does Carla experience the congregation’s efforts to help? To what extent do these helping efforts empower Carla?

Carla had a mixed reaction to the “help” of the church. On one hand, she was grateful and appreciative of the help. She was in desperate need of financial support when she realized that Rob had spent all the family resources and caused them to be in such debt that they had to file for bankruptcy. The church delivered considerable assistance financially. This help, though, became a kind of trap for her. With the assistance, the church helpers assumed control of her life decisions and she felt obligated to go along because she needed the financial help. They were paying her rent. She felt that she would be homeless if she did not comply. This ambiguity in her relationship to the church helpers caused her much distress. She seemed to feel guilty for both needing the help and for not fully appreciating it. The help was not an empowering kind of help, but help that negated her autonomy. She felt that she was treated like a child rather than the adult she was. The church helpers tended to solve her problems for her instead of with her.

10. How do the pastor and lay helpers experience Carla’s response to their help? What is the nature of relationships in this case? How may these contribute to the dynamics?

The case did not report extensively about the responses of the pastor and lay helpers. Thus, the reader of the case had to infer from the events and from Carla’s reporting of the events to Sue how the pastor and lay helpers were experiencing Carla’s response to their help. The pastor and lay helpers seemed to assume that Carla was irresponsible and in need of someone to manage for

her. The pastor tried to remain “neutral” in the matter of responsibility for the marital disruption. He wanted to be able to be the pastor for both Rob and Carla and thus not appear to take sides. Because of the church’s traditional views of marriage, it can be assumed that the pastor saw divorce as a moral failure for both Carla and Rob. They perhaps were perplexed by any resistance on Carla’s part to their guidance and had expectations of her complete submission to it. They possibly expected gratitude from her. They seemed to view Carla as a problem that needed “fixing” or “managing.”

Part of the problem for all the participants in this case was the nature of the relationships. They were members of a church “family” but the balance of power was uneven. The pastor had a professional relationship to Carla as her pastor. The lay helpers were leaders but not professionals with any particular expertise. Their view of the relationship was one of ministry to Carla and Rob. It was not apparently a friendship or equal relationship. They had power in the relationship because they were managing the flow of resources to Carla and Rob. Sue was a professional social worker without any official role in this case. Her relationship to Carla was simply that of a Sunday school classmate. She was not the leader and was not in a position to manage the resources of the church. She was a trained professional, however, and had some bit of power because of her expertise. She seemed to attempt to treat Carla with respect and empower her to act on her own behalf.

11. How is the church organized to deal with families in need? What are the strengths and limitations of these resources/strategies?

The church was organized with small groups that enabled members of the church to know each other more personally. They had discipleship groups specifically designed to address problems that people might have experienced, such as the one that Carla participated in to assist individuals to find healing for past hurts. Once a church member had specific tangible needs, at least for financial assistance, it appeared that the pastor assigned lay leaders responsibility to care for them. In this case, Gloria and Marsha helped Carla find a place to live, pay the rent, identify and pay for a drug treatment program, and link her and Rob to marriage counseling, so that they could then oversee Carla’s use of the financial help she receives.

This organization for help demonstrated an extensive effort and commitment to provide support for families in crisis, including a willingness to offer a significant outlay of financial resources from the church. This showed the valuable resource that congregations can be for families in crisis. Limitations were evident in this strategy, however. One was the lack of training or education on the part of lay helpers (or pastors, for that matter) to assist families with problems such as addictions, mental health, marital problems, or domestic violence. The other limitation or danger was a lack of empathetic understanding of the needs of people receiving help and a lack of skill toward empowering people rather than taking over for people.

12. How well was this congregation linked to the surrounding community?

This congregation did not seem to be well connected to service agencies in the community. The evidence for this was the reluctance on the part of the church helpers to refer Carla to The Women’s Place. They did secure marital counseling for Carla and Rob, but this appeared to have been a counselor within the congregation’s network. The case did not show any evidence that this counselor was skilled in identifying marital abuse.



13. Who had decision making power for options offered to Carla? What were the strengths and limitations of this decision making approach?

The approach that the church had taken with help for Carla had located all the decision-making power in the hands of the pastor and lay helpers. Carla was not even consulted about whether she wanted to buy a car. She was not given a chance to problem-solve with the helpers. She was simply given her instructions about where to live and how to spend her money. She was even given instructions on how to insist that her teen-age son work to help her with her financial obligations. The strengths of this decision-making approach were decisive action and access to the church's resources. It relieved Carla of having to think about some of these obligations. She could simply rely on Gloria and Marsha to tell her what to do. The limitations of this approach included Carla's loss of autonomy and control of her own life. She was not given an opportunity to problem-solve for herself. Her diminished sense of control over her own life advanced her sense of helplessness and powerlessness and perpetuates a victim of abuse mentality.

14. How were different people advocating for Carla?

Carla had a variety of people advocating for her in this case. Marsha and Gloria have mobilized the church to provide support and financial assistance. They had connected her to lawyers for both her marriage dissolution and for filing bankruptcy. They had found her a house to rent and a drug treatment program for Rob. They had obviously requested this help of the pastor.

Sue became an advocate for Carla as she discovered the nature of her needs. Sue connected Carla to The Women's Place, a service for victims of domestic abuse. She assisted Carla in her move into the shelter, providing for her safety once she had filed for divorce. She accompanied Carla on her visit with the pastor and accompanied her to court. Sue's decision at the end of the case revolved around how extensive her advocacy should be within her congregation.

15. What was Sue's responsibility in this case as a professional? What are the limitations of these responsibilities? What are the concrete limits in this situation? What are some limitations she encounters because she is not the church social worker?

Sue's responsibility as a professional social worker was to do no harm, at the very least. Her knowledge about Carla's needs and the potential danger that existed elevated Sue's responsibility to a requirement for action. Had Sue not gained the knowledge that she did about Carla's situation when her Sunday school class helped her move, then Sue would have had no professional obligation. This awareness, though, put Sue in a position of responsibility. The limits of her responsibilities may have simply been to inform Carla of her options, e.g. the help available at The Women's Place. She did not have professional responsibilities to talk with Carla on the phone regularly or to maintain an active relationship with her. These actions were more reflective of the responsibility that a Christian has when someone in their congregation needs support. Sue did not have an official role with the church's structure. She did not have a seat at the decision-making table about the use of church resources or the nature of help to Carla.

16. How do a person's religious beliefs affect their efforts to help others? How does their belief affect their approach to the helping process? What

are the apparent motives expressed in this case, and what may be the source of these motives?

A person's religious beliefs affect efforts to help by offering a transcendent or external rule or authority for the way people live out their lives. Beliefs can offer a basis for care and compassion toward others. They inform one's ideas about what is right or wrong, moral or immoral. They can motivate people to take action on behalf of these ideas about right and wrong, moral or immoral. Beliefs provide explanations for why the world is the way it is and why people behave the way they do. What one believes about human life and various behaviors informs what one is willing to do about it. How we define problems usually dictates how we go about solving them.

In this case, religious beliefs compelled church members to provide assistance to Carla and Rob for their full range of problems, marital relations, drug addiction, and finances. All the church members involved in this case seemed to agree on this premise. Church members can have different views of the causation of problems, though, and thus can have different approaches to helping. For instance, one person can see the cause of the problem as simple irresponsibility or sin, to use religious language. If this is the cause, then help might entail simply removing from the irresponsible party the privilege of deciding for oneself. This may have been the view that Gloria and Marsha held. If the cause of the problem, though, is not simply irresponsibility, but oppression, then help might come in the form of relieving the person of oppressive persons and structures. In religious language, this may be related to the biblical injunction to "free the oppressed." Religious belief can emphasize the weakness and frailty of the human person and then focus on the need for personal change or it can emphasize the value and worth of personhood and the imago dei in human life and strive to elicit that when offering help.

### *Action*

17. What are the possible courses of action open to Sue?

Sue has several options at the conclusion of this case both in relation to Carla and to her church. In relation to the direct impact on Carla, Sue can opt to stay out of the decision-making that is happening between Carla and the church helpers and simply continue to encourage Carla as a listening ear and supportive person. A second approach is to advise Carla about how to respond to this last affront to her autonomy and encourage/support Carla in making her own decision. A third action for Carla in relation to this final event in the case is to become a more vocal advocate for Carla and the kind of help she needs within the church decision-making structure. She could intervene with the pastor directly as a counter to the input he receives from Gloria and Marsha.

This experience with Carla can also motivate Sue to take action on a macro level. She could offer to help the church consider its approach to helping and to propose new structures for decision-making. She could offer to provide training/education about various issues that lay helpers will encounter. In short, she could offer her professional expertise to be used by the church.

The above actions can be offered by Sue both as a professional and as a member of the congregation. In fact, she cannot really separate completely her professional life and her church life. She is both. She may not have official professional positions in the church, but she can offer herself and her skill in this capacity. The official church structure, then, can either accept or refuse her assistance.

18. What are the intended and unintended consequences of the various alternative courses of action described above? How may her actions affect her future relationships with the church? Leaders? Carla?

If Sue decides to take no action, the consequences could be that Carla will continue with the current church structure of help and either maintain the status quo, gain strength to a point of not needing help any more, or have a mental and physical breakdown. Carla could eventually tire of the church's "help" and drop out and seek help another place. If Sue takes no action, she might experience no real change in her relationship to Carla or she might find that she tires of the persistent neediness of the relationship. She might possibly continue to struggle with her own professional responsibility in the relationship.

If Sue decides to take action on behalf of Carla by actively advising her, then she could find herself in more significant conflict with the "helping" structure of the church. She might find herself counseling Carla to free herself from the hold that the church helpers have. Sue could work toward empowering Carla to make her own decisions and to not feel obligated to do as Marcia and Gloria demand. This course of action, though, puts Carla in the position of risking the loss of the needed tangible support from the church and of becoming dependent on Sue's help and support.

If Sue decides to talk with the pastor about the situation as a church member who has professional expertise, the pastor may or may not be receptive to her intervention. She may find herself feeling somewhat powerless to effect any change on the church structure. The pastor may perceive Sue as interfering and as a troublemaker. On the other hand, the pastor may respond with great receptivity to Sue's efforts. Sue's action is perhaps a pivotal one for her own role in the church. She could be alienated further or she could find herself in a position to be helpful to the formal church structure about how to be effective in their efforts to support church members who are struggling with these kinds of matters. She might be able to assist the church in seeing value in understanding and utilizing community services for specialized needs such as Carla's.

19. How can Sue best support Carla in this situation?

At a minimum, Sue can support Carla by continuing to affirm her value as a person who is self-determining, i.e., who is responsible for her own decisions and not necessarily powerless to do anything other than what is demanded of her by others, whether Rob or the church "helpers." Sue can continue to be a friend to her. Any further support or involvement will have impact on how the church is involved. This could have either positive or negative consequences for Carla and her family as noted above.

20. How might Sue take action beyond assisting Carla? How can she affect the program of the church?

Sue can try to become involved in the ministry of the church in a more formal way. She can offer to lead classes at church or to assist with helping others like Carla at her church. She could approach other professionals in her church to build a coalition of support for change to the formal helping structures in the church.

She could also seek to work with community agencies to assist them in outreach efforts to churches such as Broyton. She could approach pastor groups/ministerial alliances in the community to offer education about social problems that pastors may have little experience handling.

### **Reflection**

21. How will your religious beliefs and traditions affect your professional practice? Your efforts to help people informally?
22. How does this case affect your thinking about congregations as social service resources?
23. How may your role as a professional social worker and understanding of the NASW Code of Ethics affect your actions as a church member?

### **Teaching Suggestions**

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Assign students to interview a pastor regarding domestic violence, divorce, congregational programs, and use of secular agencies in his or her congregation.
2. Assign students to interview professionals working with victims of domestic violence regarding use of congregations as resources.
3. Develop an eco-map to depict the people and relationships in this case.
4. Following the case discussion have students work in groups to propose a specific policy for how this congregation might best respond to future cases like this one that could arise in this church. What should be the levels of response, how should these situations be handled, and who would you recommend respond in these situations?
5. Have students review one of the journal articles on congregational services and family violence listed below or another article selected by the instructor. Engage students in a discussion about the specific research done in the article and what churches and social workers can learn from this research.
6. Have students research resources within their own particular faith tradition. Have them compare and contrast what resources are available and how these resources and recommendations differ between faith traditions.

### **Resources**

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### **Print**

Ake, G., III, & Horne, S. (2004). The influence of religious orientation and coping on the psychological distress of Christian domestic violence victims. *Journal of Religion and Abuse*, 5(2), 5-28.

- Ashby, H. (2005). Issues, components, and theoretical considerations in the integration of divinity and social work curricula. *Journal of Religion and Spirituality in Social Work*, 24(1/2), 35-44.
- Bent-Goodley, T. & Fowler, D. (2006). Spiritual and religious abuse. *Journal of Women and Social Work*, 21(3), 282-295.
- Brade, K. A. & Bent-Goodley, T. (2009). A refuge for my soul: Examining African American clergy's perceptions related to domestic violence awareness and engagement in faith community initiatives. *Social Work & Christianity*, 36(4), 430-448.
- Buxton, R. (2000). Domestic violence in the church: 'There is an elephant in the sanctuary and no one is talking about it.' The results of a Manitoba Survey. *Didaskalia*, 12(1), 51-75.
- Ellison, C. & Anderson, C. (2001). Religious involvement and domestic violence among U. S. couples. *Journal for the Scientific Study of Religion*, 40(2), 269-286.
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- Horne, S. & Levitt, H. (2003). Shelter from the raging wind: Religious needs of victims of intimate partner violence and faith leaders' responses. *Journal of Religion and Abuse*, 5(2), 83-97.
- Levitt, H. & Ware, K. (2006). "Anything with two heads is a monster": Religious leaders' perspectives on marital equality and domestic violence. *Violence Against Women*, 12(12), 1169-1190.
- Manetta, A., Bryant, D., Cavanaugh, T., & Gange, T. (2003). The church-Does it provide support for abused women? Differences in the perceptions of battered women and parishioners. *Journal of Religion and Abuse*, 5(1), 5-21.
- McAllister, J. M., & Roberts-Lewis, A. (2010). Social work's role in helping the church address intimate partner violence: An invisible problem. *Social Work & Christianity*, 37(2), 161-187.
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- Nason-Clark, N. (2004). When terror strikes at home: The interface between religion and domestic violence. *Journal for the Scientific Study of Religion*, 43(3), 303-310.
- Nason-Clark, N. (1997). *The battered wife: How Christians confront family violence*. Louisville: Westminster/John Knox Press.
- Popescu, M., & Drumm R. (2009). Religion, faith communities and intimate partner violence. *Social Work & Christianity*, 36(4), 375-378.

- Praglin, L. (2004). Spirituality, religion, and social work: An effort towards interdisciplinary conversation. *Journal of Religion and Spirituality in Social Work*, 23(4), 67-84.
- Rotunda, R. J., Williamson, G., & Penfold, M. (2004). Clergy response to domestic violence: A preliminary survey of clergy members, victims, and batterers. *Pastoral Psychology*, 52(4), 353-364.
- Shannon-Lewy, C. & Dull, V. (2005). The response of Christian clergy to domestic violence: Help or hindrance? *Aggression and Violent Behavior*, 10(6), 647-659.
- Sheridan, M. (2004). Predicting the use of spiritually-derived interventions in social work practice: A survey of practitioners. *Journal of Religion and Spirituality in Social Work*, 23(4), 5-25.
- Stewart, C., Koeske, G., & Koeske, R. (2006). Personal religiosity and spirituality associated with social work practitioners' use of religious based intervention practices. *Journal of Religion and Spirituality in Social Work*, 25(1), 69-85.
- Swagman, B. (2002). *Responding to domestic violence: A resource for church leaders*. Grand Rapids, MI: CRC Publications.

***Electronic***

- Fortune, Marie. (n.d.). *National declaration by religious and spiritual leaders to address violence against women*. Retrieved July 19, 2007, from <http://www.faithtrustinstitute.org/petition/petition.php>
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## **The Threat: Teaching Notes**

*Mackenzi Huyser and Laura Zumdahl*

### **Case Synopsis**

Scott Williams, a BSW level social worker at St. Andrews Medical Clinic on the north side of Chicago arrives to work one morning to find that Jeff Richards, a long-time patient, has evidently attempted to assault one of the clinic nurses. Scott and his colleagues must make a decision about how to handle the situation without assistance from a supervisor.

### **Intended Case Use**

Written for a BSW level (and MSW level) social work courses in practice with individuals or organizations, it may also be used for specialized instruction on religion/spirituality in social work practice, mental health policy, and administration or, more generally, for instruction on social work direct practice, family treatment, or case management.

### **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Recognize the complexity and impact of mental health needs on a client's well-being and physical health.
2. Balance meeting clients needs with worker safety issues.
3. Apply crisis intervention skills in the context of working with clients who are mentally ill and/or potentially violent.
4. Identify and apply interventions on a variety of human system levels.
5. Practice decision making and management skills in the context of an autonomous working environment.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions,

depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

### *Facts*

1. What background, experiences, and knowledge did Scott bring to this case?

Scott received his bachelor's degree in social work from a Christian college in 1988. Through volunteering experiences in soup kitchens and homeless shelters growing up, he developed a connection working with those who were considered "undesirable" by others, but whom he saw as people looking for a connection and way to fit in. Scott found he could connect with this population and eventually found his way into a career in social work. After finishing his BSW he took a position as a case manager in a medical clinic in the neighborhood he grew up in. Because of his wealth of experience, Scott was viewed as a great community resource on the topics of homelessness and building community support systems.

2. What was Scott's role as a social worker at St. Andrews Medical Clinic?

Scott worked as the only full-time social worker at St. Andrews Medical Clinic. In his role as a case manager, his job included conducting intake assessments, making referrals to outside service providers, and dealing with crisis situations. Because he was the only full-time social worker on staff and had been at St. Andrews the longest of all the current employees, Scott had consistent contact with most of the Clinic's patients and had made connections with his patients both inside and outside the organization's walls. Scott believed that as a social worker he needed to advocate for social services that were needed in the community for the patients he saw at the Clinic.

3. What background information do we have about Jeff Richards and the nature of his situation? What evidence was there for mental health problems?

Jeff Richards was a tall, 50-year-old, Caucasian male with a medium build. He had been coming to the Clinic for about six months to receive treatment for peripheral neuropathy, through regular checkups and prescribed painkillers. Jeff was fairly reliable in attending his appointments but he did not take his medication with the prescribed regularity. Jeff had been coming to the clinic in the mornings to get his medication, which was a plan devised by the staff to help with consistency.



The staff at the Clinic had observed unusual behavior from Jeff on multiple occasions and believed he might be suffering with schizophrenia or another mental illness. He often referred to being Belgium royalty during his moments of being delusional. As a team, the staff had decided to watch for a window of opportunity in the future to have Jeff receive a psychiatric evaluation for possible treatment and medication.

4. What was St. Andrews Medical Clinic? What was their commitment to serve the medical needs of those living on the north side of Chicago?

St. Andrews Medical Clinic was a small non-profit community health clinic located on the north side of Chicago. Funded by a federal grant given to a local hospital, the Clinic provided health care to those in the community on the north side of the city who typically did not receive health care or prevention services.

5. What type of administrative structure supervised the clinic?

The Clinic did not have an administrator directly assigned to provide on-site supervision for the staff, so instead the Clinic staff worked as a team to handle the daily issues that arose. The core team included four full time staff members, but the clinic also had other part-time or volunteer staff members as well. There was no direct supervisor of the Clinic staff, rather the staff worked to function as a team in their work. Because Scott had been at St. Andrews the longest, it was natural that the team members sometimes looked to him for leadership.

6. What approach did the staff at St. Andrews Medical Clinic take in their provision of services to patients?

The core team of staff, which included Scott, two nurses, and the receptionist and office manager, interacted often throughout the day around issues related to the provision of services for patients. The Clinic provided a place of refuge in the community for the patients, and the staff worked together to provide medical and supportive services to those in need. They held weekly staff meetings, but also interacted with each other much more informally around patients' needs many times throughout each day.

### *Analysis*

7. What risk did Jeff's behavior pose for Scott? Other staff members? Other patients? The agency? Himself?

Scott, as well as the other staff members and patients in the Clinic, were all potentially at risk for their safety. Just as Jeff threatened the nursing staff, he could also have threatened Scott or the patients in the Clinic or even in the community. In addition to threatening the Clinic staff's safety, Jeff's behavior could also have broader implications for the agency and their ability to provide services to the community. If, for example, this situation had escalated and someone had been seriously injured, the Clinic could be at risk for legal action. Finally, any time a potential violent situation occurs, the perpetrator is also at risk for harm. Jeff, in this situation, could have been hurt or harmed more seriously than just having the door slammed in his face. In addition, the long-term implications for him not receiving his medication could also impact his health and the potential safety of the community.

8. What is the basis for these safety concerns?

Many of the concerns in this situation stem from working with potentially violent patients, and in this case, a patient who is violent, perhaps as a result of mental illness.

9. How did Scott's faith background and his philosophy about helping people impact his reaction to the situation?

Through experiences when he was in high school, Scott realized he had an ability to connect with people who were "undesirable" in society's eyes. He began to understand that all people, even those in poverty, were looking for human connection and a way to fit in. These experiences influenced his decision to attend a Christian college and get a degree in social work so he could help people like those who are seen as "undesirable." Through his work as a case worker at St. Andrews, Scott worked to provide holistic services to his patients by providing not just assessment and referral services, but also working to reach out to the community and advocate for needed social services in the area. Because of his faith and prior experiences helping people, Scott valued the dignity and worth of all his patients, and this impacted his reactions to situations, such as the one with Jeff.

10. How did the team approach taken by the staff at St. Andrews impact their approach to making this decision?

Because there was not a formal administrator or supervisor assigned to oversee the Clinic, the staff worked together to make decisions. Likewise, in this crisis situation the core team of staff worked together to discuss options for handling the situation with Jeff. Because there were no formal policies for the staff to follow in situations like this, the staff was left to make the decision together using what information they had. In this case, Scott wondered if he should side with Sarah and Elizabeth who saw this instance as an opportunity to have Jeff receive a psychiatric evaluation, or with Robin, who also raised valid points about Jeff's pattern of behavior. If one member of the staff makes the decision, the others may not feel as if they are valued members of the team, but at the same time the team may not all agree on one decision.

11. Because there is no formal policy regarding situations like this at St. Andrews, how may the team's decision set a precedent for future decisions?

The lack of a formal policy regarding how to handle situations like this means the team has to struggle with how to make this decision and the precedents it may set for the future. If one member of the team makes the decision for the entire group, it may affect the team's ability to work together in the future if some people feel they are not valued members of the team. On the other hand, sometimes consensus decision making is not feasible in crisis situations. The way the team handles this situation could impact their future group interactions and ability to make future decisions. If they minimize the risk to them that may or may not have been present, they would be less likely to make any changes to their practice and would be at the same level of risk in similar situations in the future. If they overreact to this situation, perceiving a higher level of risk than may have actually been present, they may put in place cumbersome policies and procedures that enhance their safety, but reduce their effectiveness with a population who may tend to be suspicious about institutional behavior.

12. What factors should Scott consider in making his decision with regard to Jeff's right to self-determination? How can Scott maximize Jeff's self-determination?

According to the NASW Code of Ethics, clients have a right to self-determination. Self-determination falls under the social workers ethical responsibility to clients and states: "Social workers respect and promote the right of clients to self-determination and assist clients in their efforts to identify and clarify their goals. Social workers may limit clients' right to self-determination when, in the social workers' professional judgment, clients' actions or potential actions pose a serious, foreseeable, and imminent risk to themselves or others" (Standard 1.02).

If Scott sees this situation, in his professional judgment, as posing a "serious, foreseeable, and imminent risk to others" he may limit Jeff's right to self-determination. Scott can work to maximize Jeff's self-determination by attempting to include him in this decision-making process to whatever extent he is able to participate.

13. Regarding service to clients and issues of worker safety, what role should social workers play, according to the NASW Code of Ethics, to adequately serve clients and protect themselves?

The NASW Code of Ethics focuses on a number of values, ethical principles, and ethical standards which dictate the role a social worker, should play in working with at-risk/special populations. The values and ethical principles emphasized in this case may include: service, social workers' primary goal is to help people in need and to address social problems; social justice, social workers challenge social injustice; dignity and worth of the person, social workers respect the inherent dignity and worth of the person; importance of human relationships, social workers recognize the central importance of human relationships; integrity, social workers behave in a trustworthy manner; competence, social workers practice within their areas of competence and develop and enhance their professional expertise.

Additional Code of Ethics standards, which need to be considered, may include the following:

**Social Workers' Ethical Responsibilities' to Clients –**

1.01 Commitment to Clients - "Social workers' primary responsibility is to promote the well-being of clients. In general, clients' interests are primary. However, social workers' responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients, and clients should be so advised."

**Social Workers' Ethical Responsibilities to Colleagues -**

2.03 Interdisciplinary Collaboration (a) - Social workers who are members of an interdisciplinary team should participate in and contribute to decisions that affect the well-being of clients by drawing on their perspectives, values, and experiences of the social work profession. Professional and ethical obligations of the interdisciplinary team as a whole and of its individual members should be clearly established. (b) Social workers for whom a team decision raises ethical concerns should attempt to resolve the disagreement through appropriate channels. If the disagreement cannot be resolved, social workers should pursue other avenues to address their concerns consistent with client well-being.

## *Action*

14. What can Scott do to minimize risk in this situation? What can other members of the staff do?

In this situation Scott and the other members of the staff can seek to control the risk to Jeff and those around him by making sure he is safe and creating a plan to provide treatment for him, to deter future incidents like this. Importantly, the situation should also be viewed as an opportunity to analyze current policies and procedures in place at the clinic and make changes to address potential situations like this in the future.

15. What options does Scott have to assist his patient, Jeff Richards? What are the potential risks and consequences of these options for Jeff? Scott? Scott's colleagues? For St. Andrews?

Scott has a couple of options and choices in this situation. In addition to creating policies and procedures for future steps to handle these situations, Scott must make a rather immediate decision about the current situation with Jeff.

Although Scott's decision revolves around the issue of whether or not to have an involuntary mental health evaluation done, he also has to address how to find Jeff since he is no longer at the Clinic. If Scott decides to have the involuntary evaluation done, he could send the police to go pick up Jeff since he had demonstrated behaviors that were dangerous to others at the Clinic. Or Scott could try to go out and find Jeff on his own. This is a bit more risky, but if Scott finds Jeff, it would provide an opportunity to build on his relationship with Jeff to try and determine if there are other circumstances to consider and/or possibly provide an opportunity try to utilize the relationship to coax Jeff into getting mental health treatment voluntarily.

Ultimately if Scott decides to have the police get Jeff and/or have an involuntary evaluation completed, he may potentially harm the trust and rapport he's devolved with Jeff. Additionally, other patients may learn of the situation and also question their relationship with staff. On the other hand, if Jeff is evaluated and does, in fact, need treatment for his mental illness, this may result in a positive outcome for Jeff. For Scott, this option may also be an important choice for his relationship with his colleagues as they want him to choose this option to ensure their safety.

If Scott chooses not to have an involuntary evaluation completed, Jeff's right to self-determination appears to be upheld. He does not desire to undergo a mental health evaluation and has the right to make this choice within the parameters of the Code of Ethics cited above. If, however, Scott chooses this option he may be setting a precedent that situations that are potentially dangerous are not taken seriously, and this may have an impact on the Clinic and the safety of staff and patients. In addition, if Scott selects this option he may also be showing that he does not take the concerns of staff seriously and is willing to put his colleagues at risk.

There are several variations Scott may choose and other stipulations he could consider, such as a total ban from Clinic services to access to all Clinic services for Jeff. No matter what action Scott takes in this situation with Jeff, it will have an impact not only on Jeff, but on the Clinic staff, patients, and the agency. It is important to remember that every action of a front-line worker has an impact on the larger organization.

16. What crisis intervention skills would be helpful to use in this situation with Jeff?

In times of crisis timely decisions must be made. Knowledge of applicable policies and procedures is important for the staff, so they can be expedient and decisive. Knowledge of community resources and service providers (e.g., mental health services, hospitals, law enforcement) would be important. In addition, the staff members working with Jeff need to be able to calmly assess the situation and make decisions based first on the safety of the patient and those around him, without unnecessarily heightening the level of tension or fear.

17. Following this immediate crisis situation, what, if any, steps should Scott take to improve policies and procedures?

Following this crisis, Scott and the other core team members may need to develop agency policies and procedures, based on guidelines intended to prevent harm to patients or staff and uphold legal requirements that would serve as valuable tools for the staff to use in the future when faced with similar situations in the future. Situations such as the one with Jeff, can be analyzed and used as a basis upon which to develop such policies, so that they address pragmatic concerns and can be effectively implemented by all the staff at the Clinic.

### ***Reflection***

18. What personal beliefs do you have about worker safety and how that relates to client services? What steps will you take to ensure your own personal safety both now and in the future?
19. What do you personally most fear about working with clients? What can you do about this?
20. How may concerns for your personal safety influence your practice?

### **Teaching Suggestions**

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities:

1. Prior to discussing the analysis and action questions have students divide into small groups and discuss Scott's dilemma. What are the pros and cons of kicking Jeff out of the Clinic? What are the pros and cons of allowing Jeff to return to the Clinic?
2. Assign students a supplemental reading about how to assess and manage the risk of client violence (e.g., Luck, Jackson & Usher, 2007; APA Advisory Committee on Colleague Assistance, 2010).
3. Have students draft policy options and procedures for dealing with a crisis situation like this. Present the options in a round-table discussion and discuss the pros and cons of each option.

4. Scott may decide to refer Jeff for evaluation. Have students determine how to handle the referral process for their own state, including the legally required steps to have someone evaluated involuntarily. This also creates an opportunity to discuss client self-determination in regards to treatment and safety for themselves and others around them.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### Print

- Arthur, G. L., Brende, J. O., & Quiroz, S. E. (2003). Violence: Incidence and frequency of physical and psychological assaults affecting mental health providers in Georgia. *The Journal of General Psychology, 130*(1), 22 - 45
- Flannery, R. B., Jr., Fisher, W. H., & Walker, A. P. (2000). Characteristics of patient and staff victims of assaults in community residences by previously nonviolent psychiatric inpatients. *Psychiatric Quarterly, 71*(3), 195-203.
- Luck, L., Jackson, D., Usher, K. (2007). STAMP: Components of observable behaviour that indicate potential for patient violence in emergency departments. *Journal of Advanced Nursing, 59*(1), 11-19.
- Macdonald, G., & Sirocich, F. (2001). Reporting client violence. *Social Work, 46* (2), 107-114.
- Macdonald, G., & Sirocich, F. (2005). Violence in the social work workplace: The Canadian experience. *International Social Work, 48*(6), 772-781.
- Mama, R. S. (2001). Violence in the field: Experiences of students and supervisors. *Journal of Baccalaureate Social Work, 7*(1), 17-35.
- Marty, D. A., & Chapin, R. (2000). The legislative tenets of client's right to treatment in the least restrictive environment and freedom from harm: Implications for community providers. *Community Mental Health Journal, 36*(6), 545-556.
- Newhill, C. E. (2003). *Client violence in social work practice: Prevention, intervention, and research*. New York: Guilford Press.
- Pollack, D. (2010). International Legal Note: Social work and violent clients: An international perspective. *International Social Work, 53*(2), 277-282.
- Reamer, F. G. (2001). *The social work ethics audit: A risk management tool*. Washington, DC: NASW.
- Reamer, F. G. (2005). Documentation in social work: Evolving ethical and risk management standards. *Social Work, 50*(4), 325-334.
- Rey, L. D. (1996). What social workers need to know about client violence. *Families in Society, 77*(1), 33-39.

Ringstad, R. (2005). Conflict in the workplace: Social workers as victims and perpetrators. *Social Work, 50*(4), 305-313.

Spencer, P. C., & Munch, S. (2003). Client violence toward social workers: The role of management in community mental health programs. *Social Work, 48*(4), 532-544.

Weinger, S. (2001). *Security risk: Preventing violence against social workers*. Washington, DC: NASW.

***Electronic***

APA Advisory Committee on Colleague Assistance (ACCA) and Div. 12, Section VII (Clinical Crises and Emergencies). (2010). *Strategies for reducing the risk of patient violence toward clinicians* [Handout]. Retrieved July 21, 2010, from <http://www.apapracticecentral.org/update/2010/01-27/patient-violence.pdf>

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## **A Shoplifter?: Teaching Notes**

*George E. Huff, Michael E. Sherr, and Nelson Henning*

### **Case Synopsis**

Mrs. Jane Clark came to the mental health clinic (MHC) because she was court referred as a consequence of shoplifting. Mrs. Clark is a middle-aged homemaker who lives with her husband of 25 years and one teenage son. Mr. Clark is a retired Air Force member who now works for the U.S. Postal Service. In addition to the shoplifting charge that brought her to the MHC, Mrs. Clark revealed other issues in her life such as: her husband's dissatisfaction with his job, concern over her health, and her son's involvement with drugs. She also disclosed that she was a Christian and asked Mr. Cameron if he would pray for her. As Mr. Cameron prepared to write the report, he considered the conflicting thoughts and emotions he had about Mrs. Clark. He wondered what he should write to the judge.

### **Intended Case Use**

Written for an advanced-level BSW course in generalist practice, the case may also be relevant for MSW students in foundation-level practice courses. It may be useful for discussing content on general practice methods, ethics and values, spirituality, and professional boundary issues.

### **Learning Outcomes**

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the particular course and discussion focus, students will learn:

1. How a social worker's preconceptions about gender, age, and overall appearance of clients can affect professional judgments.
2. How a social worker's significant life experiences can influence professional social work practice with clients.
3. How professional social workers must often balance responsibilities to multiple systems (individual client, agency, courts, and society).
4. To assess the benefits and challenges of a helping relationship where clients share similar religious values as the social worker.
5. How their spiritual beliefs may impact professional decision making.



## Discussion Questions and Answers

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

### *Facts*

1. What brought Jane Clark to the MHC?

Jane Clark came to the MHC after being ordered by the court to have an assessment prior to the judge sentencing her for shoplifting.

2. Why was Jane Clark charged with shoplifting?

In the case, Mrs. Clark indicated that she was shopping at a local K-Mart store when she took a toothbrush and stuck it in her purse. Although she didn't remember doing it, someone else in the store had seen her put the item in her purse. She explained that she could have paid for the toothbrush and didn't really need one.

3. What was Mr. Cameron's role in this situation?

Mr. Cameron was the clinician on call when Mrs. Clark came to the MHC. He was responsible for conducting the court-ordered assessment and writing a report to the judge with appropriate treatment recommendations.

4. How did this court-ordered assessment differ from others?

The case mentioned that this was the first time Mr. Cameron can remember completing a court-ordered assessment for a female client. All the other court-ordered assessments in this military setting were with men, most of whom were referred after being convicted of driving while under the influence of drugs or alcohol.

5. Besides being charged with shoplifting, what other life events contributed to Mrs. Clark's stress level?

When charged with stealing the toothbrush, Mrs. Clark shared that she felt stressed about hosting a family get-together over the Thanksgiving holiday. She also stated feeling anxious about an upcoming doctor's appointment. She was going to have a painful procedure done for her five-year follow-up exam to make

sure that the cancer in her bladder was still gone. She also found out that her son was using drugs the day before she was caught shoplifting.

### *Analysis*

6. How well did Mr. Cameron use probing questions in understanding the issues Mrs. Clark revealed?

Overall, Mr. Cameron's use of probing questions was effective. He was able to gather a vast amount of information about the shoplifting incident, Mrs. Clark's family, her physical and emotional struggles with cancer, and the recent problems with her son. However, a few times Mr. Cameron used why questions to probe for more information from Mrs. Clark. The use of why questions often provokes defensiveness on the part of clients. For instance, when Mrs. Clark was telling Mr. Cameron about what happened at K-Mart, he asked, "Why would you have taken the toothbrush?" To which Mrs. Clark's vehemently responded, "I don't know why." To learn more about effective probing communication skills and the use of why questions, see *Understanding Generalist Practice* (Kirst-Ashman & Hull, 2002).

7. What was the purpose for requiring Mrs. Clark to have a court-ordered assessment?

The case does not mention any specific reasons Mrs. Clark was required to have an assessment. The only thing Mrs. Clark told Mr. Cameron was that she was ordered by the court to come to the MHC to have an assessment. It is quite common; however, for judges to seek what is called therapeutic jurisprudence. Therapeutic jurisprudence is a legal principal that, when considering all aspects of a case, the judge seeks to maximize therapeutic outcomes for the individual and the community (Wexler & Winick, 1996).

8. Why would the court want a social worker to conduct the assessment in this case?

The case does not mention whether or not the court specifically requested a social worker to conduct the assessment. When Mrs. Clark came to the MHC, Mr. Cameron happened to be the clinician on call. In seeking to maximize therapeutic outcomes, however, judges often recognize that social workers are trained to conduct comprehensive assessments and offer a variety of treatment recommendations that consider the individual and the community (Madden, 2003). As a social worker, Mr. Cameron is trained to assess and make treatment recommendations for Mrs. Clark that consider all the personal and environmental aspects of her life.

9. How do assessments for court adjudication differ from those in preparation for treatment? What special ethical issues emerge in this context?

Assessments for court adjudication and assessments in preparation for treatment differ in terms of the primacy of client focus. As a social worker, when Mr. Cameron performs an assessment with a client who is not court-ordered, his primary responsibility is to promote the well-being of his client. As part of the assessment, Mr. Cameron will develop rapport and gather enough information to develop treatment recommendations with the client in a way that promotes self-

determination and a reciprocal helping relationship. When performing a court-ordered assessment, however, the client is not the primary responsibility of the social worker. Section 1.01 of the National Association of Social Workers (NASW) Code of Ethics states, “In general, clients’ interests are primary. However, social workers’ responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients” (p. 7). Therefore, although as a social worker it was still important for Mr. Cameron to promote Mrs. Clark’s well-being, his ultimate responsibility was to write a report that would provide the judge with enough information to give the appropriate sentence.

10. What about Mrs. Clark’s shoplifting incident prompted Dr. Dillon to wonder whether she had a dissociative fugue and/or a dissociative disorder? Does she meet the criteria for a dissociative disorder?

In the first session, as Mrs. Clark described putting the toothbrush in her purse at K-Mart, she mentioned that she didn’t remember doing it. Again, at the end of the first session, she reiterated that she felt uncomfortable talking to someone about something she didn’t remember doing. In the next two sessions, Mrs. Clark also revealed her husband’s job situation, her five-year battle with cancer, and recent problems with her son. These stressful events in her life are also important in determining whether she meets the criteria for a dissociative disorder.

In the DSM-IV-TR, a Dissociative Fugue is characterized by “sudden, unexpected travel away from home or one’s customary places of daily activities, with an inability to recall some or all of one’s past.” According to the DSM-IV-TR definition, Mrs. Clark does not meet the criteria for a Dissociative Fugue because she did not unexpectedly travel away from home and she can recall most of her past. Instead, Mrs. Clark may meet the criteria for Dissociative Amnesia—defined in the DSM-IV-TR as “an inability to recall important personal information, usually of a traumatic or stressful nature, that is too extensive to be explained by ordinary forgetfulness.”

When deciding if Mrs. Clark meets the criteria of Dissociative Amnesia, however, the DSM-IV-TR reports that many mental health professionals “believe that the syndrome has been over diagnosed in individuals who are highly suggestible.” To learn more about dissociative disorders, see pages 519-533 in the DSM-IV-TR (2000).

11. Why did Mr. Cameron question whether he should have offered to meet Mrs. Clark at her doctor’s appointment? Was this appropriate? Why or why not?

Conducting a court-ordered assessment usually involved three one-hour sessions to develop rapport with clients and gather enough information to write a report with treatment recommendations for the judge ordering the assessment. On one hand, offering to meet Mrs. Clark at her doctor’s appointment could communicate warmth, empathy, and genuineness—all important components of developing rapport with his client. On the other hand, in his professional relationship with Mrs. Clark, offering to meet her at the doctor’s appointment does not seem pertinent to completing a court-ordered assessment. Although the case does not specifically say why Mr. Cameron was questioning his offer, it is possible that his personal experiences with his father led him to offer help that he realized was outside the purpose of his role with Mrs. Clark. If his father’s battle with cancer made Mr. Cameron oversensitive to talking about cancer, then his offer to accompany Mrs. Clark may have had more to do with his own feelings and less to do with his professional helping role with Mrs. Clark.

12. How important were Mrs. Clark's religious beliefs to the case? Can her beliefs be considered a strength?

In the case, Mrs. Clark mentioned her religious beliefs as she was telling Mr. Cameron about her son. Although Mr. Cameron never asked her, she mentioned that she was a Christian and that she attended First Presbyterian Church every Sunday. After Mr. Cameron shared that he, too, was a Christian, she then asked him to pray for her. She also mentioned that her church is her only tie to the rest of the community.

It seems Mrs. Clark's religious beliefs were a source of strength. First, her beliefs appeared to provide a way of coping with her stress. She even asked Mr. Cameron to pray for strength and wisdom for doing what she needs to do and becoming a better Christian. Second, her beliefs reinforced her church involvement which provided her with a network of other people outside her family to call upon for support. At the same time, her religious beliefs might have also contributed to her stress. Although Mrs. Clark attended church every Sunday, she had feelings of embarrassment that prevented her from sharing with other congregants or her pastor. She also wished church was as important to her family as it is for her. She wanted the family to pray together. In this case, her uncertainty about her family's religious beliefs and practices can be considered a contributing factor to her stress. If Mrs. Clark begins treatment, further assessment of her religious beliefs may be helpful in assisting her to facilitate positive change.

13. Was it appropriate for Mr. Cameron to disclose his spiritual orientation to Mrs. Clark? Why or why not?

Kirst-Ashman and Hull (2002) suggest three guidelines for determining the appropriateness of social worker self-disclosure: 1) The self-disclosure is for the benefit of the client; 2) The self-disclosure is relevant and timely given the professional relationship; and 3) The self-disclosure is concise and simple. Using these guidelines, Mr. Cameron's self-disclosure appears to be mixed. Only after Mrs. Clark mentioned she was a Christian did Mr. Cameron disclose his spiritual beliefs. On one hand, his response was simple and apparently beneficial to the client as he shared that he, too, was a Christian and could identify with how important church was to her. At the same time, the purpose of Mr. Cameron's professional relationship was to complete a court-ordered assessment. It is questionable whether sharing his spiritual orientation with Mrs. Clark was relevant and timely given the nature of their relationship. In fact, after his self-disclosure, Mr. Cameron ended up praying for Mrs. Clark, which ultimately contributed to his uncertainty about writing the court report. Stated differently, if Mr. Cameron did not tell Mrs. Clark that he was a Christian, she may not have asked him to pray for her. Then, their prayer together would not have contributed to his uncertainty about what to write in the court report.

14. How may Mr. Cameron's views about gender and age influence his assessment of Mrs. Clark?

Although the case does not mention specific thoughts or statements about Mr. Cameron's views of gender or age, he immediately acknowledged that doing a court-ordered assessment with Mrs. Clark seemed different. As a social worker on a military base, Mr. Cameron was accustomed to doing court-ordered assessments of men typically referred after being charged with driving under the influence of drugs or alcohol. Clearly, he was not accustomed to seeing

an impeccably dressed, 50-something Caucasian woman show up for a court-ordered assessment. In the first session, as Mrs. Clark described what brought her to the MHC, Mr. Cameron questioned why she was charged with shoplifting for taking a toothbrush. He later offered to meet Mrs. Clark at her doctor's appointment and even prayed for her. Although he may have been willing to do both for a male client, given the context of the case, it seems possible that Mrs. Clark's gender and age affected Mr. Cameron's professional judgment. In addition, Mrs. Clark's gender and age evidently contributed to Mr. Cameron's uncertainty in writing the report to the judge. He thought to himself, "Mrs. Clark should not have been charged with a crime. She's a woman in her 50's with no prior record."

### *Action*

15. How might Mr. Cameron re-phrase some of the probing questions where he used "why" questions?

There are two instances in the case where Mr. Cameron might consider re-phrasing his probing questions. First, when Mrs. Clark was telling Mr. Cameron about what happened at K-mart, he asked, "Why would you have taken the toothbrush?" To which Mrs. Clark's vehemently responded, "I don't know why." A more effective probing question might have been, "I wonder what prompted you to take the toothbrush?" Another question may have been, "Could you share any thoughts or feelings you were having at K-mart before you took the toothbrush?" Second, after Mrs. Clark told Mr. Cameron about her cancer, he asked, "Why do you think you are OK but don't know for certain?" Instead of using a why question, Mr. Cameron might have asked, "Can you tell me more about your concerns with your cancer?"

16. After learning of Mrs. Clark's worry about her upcoming doctor's appointment, what are some alternative ways Mr. Cameron could have helped without offering to accompany her to the doctor?

There are at least three other ways that Mr. Cameron could have helped Mrs. Clark without offering to accompany her to the doctor. First, using reflective listening skills, Mr. Cameron could offer a few empathetic responses to validate how appropriate it might be for Mrs. Clark to worry about the appointment. For example, Mr. Cameron might say, "I can see that you are clearly concerned about your doctor's appointment. After five years of being diagnosed and treated for cancer, I imagine it's quite normal to feel worried about a painful procedure." Second, Mr. Cameron could ask Mrs. Clark questions designed to help her separate reality from her fears and reframe her view of the doctor's appointment. He could ask Mrs. Clark to talk about the five years of treatment, review the purpose of a follow-up doctor's visit, discuss the doctor's prognosis of her cancer up to this point, and consider the prerequisites for her doctor to even recommend a thorough follow-up exam. Finally, if Mr. Cameron wanted to make sure someone was with Mrs. Clark for support, he could help her consider her natural social network to consider whom she could ask to accompany her to the doctor's appointment. From the details in the case, some of her options appear to be her husband, her son, her pastor, and other members of the church.

17. How could Mr. Cameron incorporate Mrs. Clark's religious beliefs and church participation in his treatment recommendations?

Mr. Cameron could consider Mrs. Clark's religious beliefs and church participation as strengths to help with treatment or a concern that needs to be addressed in treatment. On one hand, Mrs. Clark identified herself as a Christian, who is a member of a church where she attends every Sunday, and admits that her church is her only tie to the community. Mr. Cameron's treatment recommendations could build upon her beliefs and support network by: 1) assisting Mrs. Clark to identify a few tangible ways that she can draw on her beliefs to help her cope as she deals with the stresses in her life; 2) referring Mrs. Clark to a pastoral counselor who is not affiliated with her church, where she might be more comfortable addressing her life stressors; or 3) using behavioral rehearsal to help Mrs. Clark practice asking either the pastor or someone else she trusts at the church for support. By using behavioral rehearsal, Mrs. Clark's anxiety over her fear of embarrassment may dissipate.

On the other hand, Mrs. Clark's religious beliefs and church participation also appear to be a concern. Her uncertainty about her husband's beliefs, her son's participation at church, and the lack of family prayer at home could be contributing to her stress. Moreover, Mrs. Clark's church membership being her only tie to the community may also be a concern. Mr. Cameron's treatment recommendations could address these concerns by: 1) referring her to a Christian family counselor who could help the family explore how their beliefs and church practices influence their family functioning; 2) helping Mrs. Clark expand her support network by linking her with opportunities to meet people outside of church; or 3) using the ecological perspective to help Mrs. Clark improve the goodness-of-fit between her church and her family by either finding a church that her whole family would be willing to attend or communicating with her family how important it is to her for everyone to go to church together and pray together.

18. What should Mr. Cameron write in the court-report?

Using a strengths perspective, Mr. Cameron could view writing the court-report as an opportunity to help Mrs. Clark receive necessary support services. To begin the report, he could acknowledge Mrs. Clark admitting to taking the toothbrush, her not remembering what happened, and her willingness to be accountable for breaking the law. Next, he could report her anxiety about her cancer treatment and her son's recent behavior as life stressors which may have contributed to her doing something which she did not remember. He could report that the MHC is assessing to determine if Mrs. Clark suffers from Dissociative Amnesia and recommend a psychiatric evaluation as well as possible treatment. Mr. Cameron could also recommend that Mrs. Clark participate in a support group for cancer survivors. Finally, Mr. Cameron could recommend referring Mrs. Clark to a professional provider who is considered competent in pastoral and family counseling to improve the communication in her family, specifically addressing issues related to religious beliefs.

19. If the judge orders counseling services for Mrs. Clark at the MHC, should Mr. Cameron be assigned as the primary clinician? As a professional social worker, what are some of the pros and cons for assigning Mr. Cameron as her primary clinician?

Over the course of three sessions, Mrs. Clark appears to have developed enough rapport with Mr. Cameron to describe what happened at K-Mart, describe her relationship with her family, describe her fears about her upcoming doctor's appointment, describe the recent problems with her son, and ask Mr.

Cameron to pray for her. By becoming her primary clinician, Mr. Cameron can build upon Mrs. Clark's established trust to begin addressing some of her life stressors. Transitioning into the role of Mrs. Clark's primary clinician may also be more efficient as Mrs. Clark will not have to share all of her life stressors over again with a new clinician. However, Mr. Cameron appears to have strong countertransference issues with Mrs. Clark that could be a cause for concern. The case indicates that Mr. Cameron's father was undergoing treatment for cancer. As Mr. Cameron identified with Mrs. Clark's concern, he felt a strong desire to help her. His strong desire led him to offer help in a way, which given the current parameters of his relationship with Mrs. Clark, may be seen as outside the scope of his responsibility as a professional social worker. Furthermore, Mr. Cameron also self-disclosed that he too was a Christian. Although at the time his self-disclosure seemed an appropriate response, he ended up praying with Mrs. Clark right before he was about to write the court-report. Their prayer together obviously influenced his view of Mrs. Clark's remorse. In a longer-term professional relationship, Mr. Cameron's countertransference could lead him to further questionable practices. If he becomes Mrs. Clark's primary clinician, he will need close supervision to help him remain conscious of his countertransference so he can use it in a way that is therapeutic instead of in a way that leads to possibly unethical decisions.

### **Reflection**

20. As a professional social worker, what do you need to consider before meeting clients outside of the parameters of the relationship?
21. Is it ever appropriate to share your spiritual orientation in the context of a professional helping relationship? If yes, under what circumstances? If no, explain?
22. When working with people who are court-ordered to see you, who is the client?
23. If you were writing a court-ordered report for a 20-30 year old black male who had stolen a toothbrush, that also had many life stressors, how different or similar might your report be to Mr. Cameron's report?

### **Teaching Suggestions**

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. In advance of the class discussion, assign students to read entries for dissociative fugue and dissociative disorder in DSM-IV-TR.
2. To deepen understanding of appropriate professional relationships, an instructor may encourage students to link theory with several aspects of the case.
  - a. The instructor could begin the class session by asking students to describe characteristics of an appropriate professional helping relationship. As the students share, the instructor can list their comments on the board.

- b. Next, the instructor could have the students work in small groups to develop a prioritized list of boundary issues associated with this case. Assign one group member to serve as a recorder.
  - c. After about 15 minutes, have each group report to the class their list. Invite each group to explain why they identified the issue and assigned the resulting priority.
  - d. Using the list of attributes developed at the beginning of class, have students go back into their groups and develop alternative interviewing approaches Mr. Cameron can take to be just as effective with Mrs. Clark while maintaining a more appropriate professional relationship.
  - e. As a class, discuss the ideas generated by small groups.
3. When assigning the case, ask students to write a brief paper outlining what they would put in the court-report. As part of the paper, ask students to provide at least three treatment recommendations with their rationales for making the recommendations. In the final part of the paper, ask students to decide whether Mr. Cameron should become Mrs. Clark's primary clinician and provide the advantages and disadvantages to their decision. At the next class session, have students share their papers in small groups with the task of trying to come to a consensus about what to put in the court-report, the three treatment recommendations, and whether or not Mr. Cameron should become the primary clinician. After the groups finish, have the class reassemble and report their conclusions.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### *Print*

American Psychiatric Association. (2000). *Diagnostic and statistical manual of mental disorders* (4<sup>th</sup> ed., Text Revision) [DSM-IV-TR]. Washington, DC: Author.

Dannon, P. (2002). Kleptomania: An impulse control disorder? *International Journal of Psychiatry in Clinical Practice*, 6(1), 3-7.

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- Trotter, C. (2006). *Working with involuntary clients: A guide to practice*. Thousand Oaks, CA: Sage Publications.
- Wexler, D. B., & Winick, B. J. (Eds.). (1996). *Law in a therapeutic key: Developments in therapeutic jurisprudence*. Durham, NC: Carolina Academic Press.

### **Electronic**

- Department of Social Welfare and Development – Philippines. (2002). *Guidelines in the accreditation of social workers managing court-related cases*. Retrieved October 1, 2009, from [http://www.dswd.gov.ph/images/articles/AO\\_138\\_2002.pdf](http://www.dswd.gov.ph/images/articles/AO_138_2002.pdf)
- Kleptomaniacs and Shoplifters Anonymous. (2007). *Shoplifters Anonymous - Assessment for compulsive shoplifting*. Retrieved October 1, 2009, from <http://www.shopliftersanonymous.com/20questions.htm>

National Organization of Forensic Social Work. (n.d.) *National Organization of Forensic Social Work: Committed to quality in forensic social work*. Retrieved October 1, 2009, from <http://www.nofsw.org/>

Oliver, E. (2000, December). Social workers discredit court's report; Give startling evidence. *Massachusetts News*. Retrieved October 1, 2009, from [http://www.massnews.com/past\\_issues/2000/12\\_Dec/1200middlesex5.htm](http://www.massnews.com/past_issues/2000/12_Dec/1200middlesex5.htm) [Good source to show how important comments made by a social worker can be to a client's case, and how they may stay with the case for a long time.]

Professional Boundaries. (2002). *Professional boundaries: Building professionalism*. Retrieved October 1, 2009, from <http://www.professionalboundaries.com> [offers CEU's on professional boundary courses.]

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# Am I Missing Something?

## Teaching Notes

Mary Anne Poe

### Case Synopsis

Susan Brantley, a licensed school social worker with the James County School System (JCSS), thought an upcoming Individual Educational Plan (IEP) meeting would be routine. The appropriate placement for student Robby Pearson seemed obvious to her. She had been so pleased with his recent school performance and was optimistic as he began high school. When her supervisor called Robby's school with an urgent request to talk to her before the meeting, however, Susan discovered that what seemed obvious to her did not correspond with what others wanted for Robby. She did not have much time to decide what to do because everyone was already gathering and the meeting was about to start. Susan knew that what she decided at this moment had huge implications for Robby, but it might also cost her the job she loved, and possibly the job of her supervisor and friend, as well.

### Intended Case Use

Written for a baccalaureate level (and masters level) social work course(s) in practice, the case may also be used for specialized instruction on religion/spirituality in social work practice, social work practice in schools, policy regarding disabilities and special education, and values and ethics or, more generally, for instruction on social work direct practice, family treatment, or case management.

### Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course where used and the discussion focus, students will learn or learn to:

1. Gain understanding about policies and laws regarding children's disabilities and special education services.
2. Explore opportunities for being an advocate for vulnerable populations, for policies that protect the rights of these populations, and for the role of the social work professional as an advocate for social justice.
3. Identify ways that one's personal faith may be challenged and/or expressed in public settings, including ways that it may contribute to and serve as a resource for ethical dilemmas.

4. Recognize the benefits and challenges in working as part of an interdisciplinary team to deliver services.
5. Understand the impact of social environment on human behavior, for both clients and professionals.
6. Learn to recognize ethical conflicts in practice, learn how to analyze or problem-solve in the midst of such conflicts, and understand the risks and benefits in trying to practice consistent with one's personal and professional values and ethics.
7. Explore the extent to which they are willing to make significant personal sacrifices in order to take a stand for something they believe is right.
8. Explore the dynamics involved in taking a stand contrary to the position of powerful others, especially when doing so may be costly both for others as well as themselves.
9. Compare the costs and benefits of taking a stand on behalf of one disadvantaged individual or family at the potential cost of future services to other individuals or families with similar disadvantages.
10. Explore the interaction of their Christian beliefs and values with their professional ethics and values.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What do we know about the James County School System and its student population?

The James County School System served approximately 18,000 students. About 4,200 of these students were certified as disabled and eligible for special education services. The school system had two social workers who were assigned exclusively to some 280 students educationally certified as emotionally disturbed. The Director of Special Education supervised the social workers. The

school system also employed several crisis counselors that provided mental health services in the schools. The school system, as well as the county and town of Florence were continuing to recover from a racist past. The school system had about an equal number of White and Black students. The town of Florence, on the other hand, had a population of about 65% White and 35% Black. A large percentage of students, approximately 20%, attended private schools. The public schools operated under the supervision of a federal court due to a lawsuit filed by the NAACP charging the school with insufficient attention to integration.

2. What do we know about Susan Brantley and the practice of social work in this school system?

Susan was an MSW social worker who had a strong, personal Christian faith. She had worked in the James County School System since 1993. She began her work with emotionally disturbed students and their families in the school system as an employee of Behavioral Health Services. The school system hired Susan directly in 1997. She was the first social worker employed by the system. The following year the school superintendent hired an additional social worker. Susan's supervisor was Pamela Hutchens, the Director of Special Education. Susan and Pamela had been friends for many years and attend church together.

3. What do we know about Robby Pearson?

Robby was born with cerebral palsy. The left side of his body was partially impaired, causing him to walk with a noticeable limp. He had a significant speech impediment and was very small compared to his classmates. When Robby was seven years old, he and his family moved to Florence and he entered the James County School System. In second grade he was diagnosed with Attention Deficit/Hyperactive Disorder and Intermittent Explosive Disorder. This same year he was placed in a self-contained special education classroom for emotionally disturbed children. By the end of his fifth grade year, he was placed again in a regular classroom and remained in a regular classroom through the eighth grade.

Robby's family life was stressful. His parents divorced when Robby was nine. His father moved away and did not maintain contact with him. He lived with his mother and two younger brothers until Robby was in fifth grade. At this time, Robby's family came under the supervision of the Department of Children's Services because of his mother's lack of stability and supervision for him. All agreed that Robby's grandmother's home would be more stable for Robby. After moving in with his grandmother, Robby's behavior at school improved and he was able to be in a regular classroom. At the end of his eighth grade year, Robby's grandmother died and he returned to his mother's home. He got into a physical altercation with his mother and was again removed from her care and placed in a residential treatment program. Robby completed eighth grade and was about to enter high school. He had not had any difficulties in the school setting for three years.

4. [If students have additional information about education policy:] What are the policies/laws regarding special education services?

The Individuals with Disabilities Education Act (IDEA) (U.S. Public Law (PL) 94-142) required that public school systems provide a free and appropriate education to all disabled students within the least restrictive environment, aged 3 through 21. Students who were certified as needing special education

services were entitled to special education services under the supervision of a multidisciplinary team that included the parents or guardians of the child. This team developed objectives for each child in a plan called an Individualized Educational Plan (IEP). This law included all children who were seriously emotionally disturbed and, in effect, required that schools employ social workers to assist in providing the appropriate services.

### *Analysis*

5. What is the dilemma for Susan? What factors contribute to this dilemma and then complicate it?

Susan's job was to advocate for appropriate services and classroom placement for the students certified as emotionally disturbed. In her professional judgment, Robby could have continued in a regular classroom where he had done well for the past three years. Robby and his mother desired a regular classroom as well. Other professionals involved in Robby's IEP, specifically the principal, insisted that he should be placed in a self-contained classroom. The school superintendent had ordered that all school employees support the principal. This was a violation of the federal law that gave each member of an IEP team an independent vote. Susan had to decide what to do in the face of this legal challenge as well as the challenge to her own professional integrity. For Susan, this was also a challenge to her faith and the fellowship she enjoyed in that faith with her supervisor who was asking her to go against her own best judgment.

Factors that might contribute to the dilemma in this particular context include the dual relationship that Susan and Pamela have, the history of strained race relations in this school system and perhaps a hypersensitivity to anything that might look like a problem in this arena, Robby's own history of explosive behavior and the recent incident with his mother, and possibly different ethical codes of conduct for different professionals involved on this case.

The case identified racial identity but did not necessarily imply that race was a mitigating factor in this particular case. A past problem in the school system regarding race could have potentially influenced every decision at every level as individuals continued to learn to work together. Unequal treatment of minorities and the racial conflict of the past probably have eroded trust and may have been a factor in why one or more of the players in this case took the positions they did.

6. What were the risks and benefits of placing Robby in a self-contained classroom or a regular classroom?

A regular classroom placement offered Robby an opportunity to begin high school just like other high school students. As he met a new principal, teachers, and students, a regular classroom would likely not have been as stigmatizing as a self-contained classroom for emotionally disturbed students. He had functioned well for three years in a regular classroom, gaining a sense of accomplishment, stability, and normality. A self-contained classroom could have caused a set-back for him in his educational program.

The principal may have been more concerned to protect his teachers and students as they began a new school year. The primary risk in a regular classroom was the possibility that Robby might have a disruptive and violent episode. Perhaps the principal thought that the risk was great for Robby as well. An outburst in a regular classroom would certainly not have been of any benefit to him.

7. What specific principles in the NASW Code of Ethics are relevant to this case? What guidance might Susan find in the Code?

Each of the six core principles of the NASW Code are relevant to this. The principle of service directs the social worker to primarily be concerned about helping people in need. The social worker's first responsibility is to their client and not to a convenient and easy way to resolve a problem or to their own self-interest.

The second core principle is social justice. In this case, the client is vulnerable to a system that could easily overwhelm this child and his mother. The social worker's role is to ensure access to information, services, equality of opportunity, and participation in decision-making.

The third and fourth core principles suggest the power of human relationships and the necessity of valuing of each person regardless of their culture or differences. This principle requires that social workers be responsible to their dual role toward clients and the broader society. Resolving the conflict in this case, i.e., what is best for the school as a whole and what is best for Robby, is the challenge for the social worker. Facilitating positive change in the relationship that Robby has with the school seems to be a very important aspect of this case.

The principle of integrity requires that Susan act honestly in her practice. This could mean that she do what she thinks is best for her client regardless of personal costs. The final core principle is competence. Susan has proven herself competent to do the work that she is doing. In this case, she does not seem to be in a situation that would be outside her expertise.

The NASW Code also details specific ethical standards in relation to commitment to clients, colleagues, in practice settings and as professionals, and to the broader society. The primary responsibility is to promote the well-being of clients. Balancing Susan's responsibility to Robby with responsibility to the larger context of the school is exactly the challenge that Susan faces. Judgment is always required. Often a mediating course can be established. In this case, Susan's options offer a range from solely protecting Robby's rights to solely protecting the interests of the school as a whole. A mediating course might be to begin in the classroom setting that the principal desires but to plan a smooth and quick transition for Robby to a less restrictive environment after he successfully manages his behavior.

8. How does Susan's faith inform this case situation? What questions does this raise for her in relation to her faith? Given the principles provided by the NASW Code of Ethics, what difference does it make that Susan is a Christian?

Christian faith is about certain beliefs and the choices Christians make to live in a manner congruent with those beliefs, as well as the possible consequences of those choices. Susan was motivated to enter social work practice by her faith. Susan's faith commitments were integrated into her thinking about what to do. Her immediate reaction to Pamela's order highlighted the conflict with her faith. "I'm a Christian. I can't just not go," Susan thought as she considered what to do. A person whose Christian faith is not active does not have the faith dimension added to their reasoning. They may respond on the basis of their own understanding of ethical conduct, with consideration of the Code of Ethics as their only guide. In this situation, the Code of Ethics and Susan's faith did not collide, but actually reinforced each other. They both suggested to her the values of promoting justice and practicing with integrity.

Susan's faith did not appear to be a part of the public arena in this case. The others involved did not identify her as the "Christian" voice in the situation. She did, however, have to decide how to handle this with Pamela at a later time. They went to church together, shared a common faith, and had been friends for a long time. The possibility that one or both of them might lose their jobs as a result of Susan's decision to take the position she believed was right could seriously strain or rupture their relationship, or it could strengthen their bond as they resolved conflict together.

The presence of Susan's professional standards as expressed in the NASW Code of Ethics appears to reinforce a Christian position to value social justice, integrity, human relationships, and the dignity and worth of persons. Alternatively, her Christian faith can empower and support her efforts to actually fulfill the standards required in the Code of Ethics. They can be seen as mutually reinforcing.

### *Action*

9. What are the options Susan has in response to the call from her supervisor instructing her not to attend the IEP meeting? How might the various choices affect the participants?

Susan identified several options just as she closed the conversation with Pamela. She could just leave the building with some excuse for not attending the meeting or she could defy the school superintendent and her supervisor and attend the meeting and vote her conscience. Some other ideas might include: 1) She could have a quick conversation with Robby and his mother prior to the meeting, encouraging them to insist on a regular classroom placement. The federal law gives considerable power to parents in IEP meetings. This would allow Susan to leave the meeting as she was instructed, but with a sense that she was helping Robby and his mother advocate for themselves. 2) She could go into the meeting and try to convince the other participants (including the principal) of her position, but vote with the principal as directed. 3) She could skip the meeting, but follow up with conversations with Pamela, the principal, and the superintendent about her concerns for the process followed in this case. 4) She could plan to file a complaint against the school system for a violation of the law.

The various options can be considered in terms of the impact a particular choice might have on Robby, his mother, Susan, the integrity of the IEP process in this school system, the role of the social worker in the school system, and relationships between the various participants.

If Susan just leaves, the principal's influence will likely prevail and Robby will return to a self-contained classroom. She would have to live with herself and her unwillingness to challenge the authority of the supervisor who was making what she thought were unethical mandates. Susan could leave the meeting with a plan to follow up with her supervisor and the superintendent of schools. She could plan to review with them the law and her responsibility as a professional. This would allow her to represent her case to them without spoiling the relationship she has developed over the years. She would not be in the position of embarrassing them publicly in the IEP meeting, but would leave Robby without an advocate in the meeting. Depending upon the timing and success of her follow-up conversations, Robby might have to initially return to a self-contained classroom and might thus experience the stigma Susan wanted to avoid for him, even if he ultimately is placed in a regular class.

If Susan stays in the meeting, she still has choices to make. She could be a strong advocate for Robby, she could encourage Robby and his mother to speak



for themselves, or she could remain silent. If she stays and advocates strongly, she satisfies her conscience and she might gain for Robby a place in a regular classroom. This is not a placement, though, that school personnel desired. Robby may be at risk in this new school if his beginning is controversial in this way. Maintaining her position in the meeting would set up an adversarial relationship between Susan and the superintendent. They have suggested that this behavior would be insubordination. She could lose her influence in the system by not being perceived as a team player. Although she might not lose her job because of the legalities, her professional relationships would change.

Susan could choose to leave the school and not attend the meeting, but have a conversation with Robby and his mother before she leaves. She could remind them of their rights and encourage them to advocate for themselves and what they think is best. The variety of choices Susan has and the long- and short-term implications of these choices are multiple.

This situation and Susan's choices can be considered in terms of power and the use or misuse of power, particularly in relation to at-risk populations. The superintendent wields considerable power because of his position in the school system. Susan can access that power to the benefit of her clients by the way she handles her relationship to him. Susan has the power of the law on her side as well as her professional expertise. She can help the superintendent see the value of the law, especially in regard to students like Robby. This particular experience might open an opportunity for Susan to reinforce the need and value of advocacy for students with special needs that subsequently might impact far more students than Robby. Robby and his mother are also empowered by the law, particularly if they are aware of it. They can be coached to make use of this power. The role of social work in a host organization, such as a school system, also reveals power differentials. The educators involved in this IEP meeting exercised a kind of power associated with the fact that it happened within the education system, and Susan would have less power as one of only a few "guests" in this host organization.

### *Reflection*

10. How would your religious beliefs and personal faith affect ethical choices you might encounter, such as the one faced by Susan?
11. How can personal relationships, such as the friendship Susan has with Pamela and the pressure from her to take a particular action, complicate practice decisions?
12. How do you think a professional social worker can best balance the responsibility to be an advocate for clients while practicing within the structures, policies, and culture of an agency?
13. Susan and Pamela work together and go to church together. How do you think such dual relationships could enhance one's practice? How could relationships of this nature create problems?

## Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Prior to the case discussion, teachers could make various assignments depending on what the teacher wants to emphasize in class. Some suggestions include:
  - a. Research U.S. Public Law (PL) 94-142, the Individuals with Disabilities Education Act;
  - b. Research what a diagnosis or certification of “emotionally disturbed” means;
  - c. Interview a school social worker about the IEP process or about what it is like working as a part of interdisciplinary teams;
  - d. Learn about various professionals in a school setting (e.g., crisis counselor, guidance counselor, social worker, psychologist, special education teacher); visit the website of the School Social Work Association of America, <http://www.sswaa.org>, the Tennessee State Department of Education (or its equivalent in the student’s state of residence, <http://www.sswaa.org/links/statedoe.html>) or the U. S. Department of Education <http://www.ed.gov/index.jsp>; or
  - e. Write a short paper describing how they would handle the case and why. Preparing such a paper before class forces them into the practitioner role, rather than allowing them to simply hear in class other student’s perspectives.
2. In class, teachers could establish a mini-debate with students choosing very different courses of action (e.g., leaving the building or defying the principal). As students debate the two extreme options, they can begin to understand the complexities and nuances of such choices and the effects, both short and long-term, on the various participants.
3. Another in-class option, following the case discussion, is to role play the IEP meeting by assigning different roles to students, such as principal, Robby, his mother, Susan, special education teacher, a regular education teacher, and the DCS staff member. In this role play, the social worker may attempt to implement a preferred response from the case discussion. When students are put into roles they can begin to appreciate the uniqueness of the social work role and develop appreciation for all the other roles. Of course, the role and position of the client is especially important for students to understand.
4. To familiarize students with the literature in the area of school social work, have them review and present findings to the class from a recent article in the journal, *Children and Schools: A Journal of Social Work Practice*. This journal provides professional materials relevant to serving children in school settings. It also identifies itself as a journal that is a practitioner to practitioner resource.

## Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

### Print

- Allen-Meares, P. (1994). Social work services in schools: A national study. *Social Work, 39*(4), 560-567.
- Allen-Meares, P., Washington, R. O., & Welsh, B. L., (2000). *Social work services in schools* (3<sup>rd</sup> ed.). Boston: Allyn and Bacon.
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# The Eligibility Error: Teaching Notes

*Mackenzi Huyser and Terry A. Wolfer*

## Case Synopsis

Social worker Sarah Adams, employed by New Hope Housing Corporation, met Ms. Washington at an early morning agency orientation session. Ms. Washington initially appeared to be a strong candidate for the agency's pilot partnership program with the local Department of Housing and Urban Development (HUD) for Section 8 recipients. Upon further review of her application, however, Sarah discovered that Ms. Washington did not qualify for the home ownership program because her household income was too high to be eligible. In fact, Ms. Washington's income level also disqualified her for Section 8 assistance, and Sarah must decide whether and to whom to report it.

## Intended Case Use

Written for a bachelor's level capstone or integrative seminar, the case may also be useful for practice courses that focus on micro or macro practice. It may also be useful for specialized instruction on income verification, program eligibility, policy enforcement, potential fraud, working with clients who misuse programs, professional integrity, or housing services. This case may also be relevant for foundation level MSW coursework on these topics.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the course and focus of the discussion, students will learn:

1. The importance of program eligibility requirements when referring clients to programs.
2. Resources for housing in their own communities and their eligibility requirements.
3. Reasons for variations in program eligibility requirements- based on goals of programs, policy makers, etc.
4. Opportunities and challenges faith-based service providers encounter when working with secular organizations.
5. The structure of nonprofit organizations and how that structure impacts

the work of partnership programs and resource sharing.

6. Ethical standards applicable to working with program eligibility and joint ventures with other organizations.
7. Ethical standards related to client confidentiality and the possible dilemmas these may create for the worker and agency.
8. Benefits and challenges of new joint ventures between non-profit organizations as well as between non-profit and for-profit organizations.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize and their students' familiarity with and skill in discussing decision cases. Indeed, instructors may need to develop their own additional discussion questions for particular purposes. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What background, experiences, and knowledge did Sarah Adams bring to this case? What type of social worker was Sarah?

Sarah, a Caucasian female, received her bachelor's degree in sociology from a small Christian college in 1997. Growing up, she had developed a strong passion for urban and community issues and because of this, decided to focus on community development work. Sarah had been involved in volunteer work with Habitat for Humanity.

Sarah worked for three years as a program director in a homeless shelter where she gained most of her experience. Her job included organizing day programs for the residents (e.g., job training, life skill development). In this job Sarah enjoyed the interaction she had with the residents but was discouraged by their limited progress. She described seeing the same clients month after month and feeling like she was helping them with the same skills over and over again. Generally, she felt like she was making little difference. For this reason and the need to pursue other life goals, Sarah decided it was time to leave her position.

Subsequently, Sarah began to pursue her Master of Social Work degree on a part-time basis and began a new job at New Hope.

2. What background information do we have about Ms. Washington and the nature of her situation?

Early on, the case indicates that Ms. Washington, an African American female, moved to Fort Wayne the previous year from the state of Illinois to be closer to her parents. She was the mother of three daughters, two of whom lived with her. Ms. Washington became interested in home ownership when she moved to Fort Wayne and began exploring various home ownership programs. She was interested in New Hope's program because she was receiving Section 8 assistance and liked the pilot partnership program offered in collaboration with HUD.

Later, the case reports that Ms. Washington worked full-time at Strong Packaging Company, and had annual income of \$23,000. In addition, she was married and her husband worked two jobs and had annual income of \$42,000. Despite the income, Ms. Washington was also receiving Section 8 assistance, which she transferred from Illinois.

3. What was New Hope? What was the nature of the pilot partnership between HUD and New Hope?

New Hope was a nonprofit faith-based organization located in Fort Wayne. Their mission was to "serve individuals, families, and communities through innovative housing programs as a response to God's call for social justice." With the leadership of an executive director who was a trained social worker and an active board of directors, New Hope had a solid community reputation. Funding for New Hope came from Christian churches, individual donors, and foundation grants, as well as state and federal sources.

The partnership between New Hope and HUD was a pilot program that had been operating for almost nine months. The goal of the partnership was to assist families receiving Section 8 assistance to transition into home ownership. HUD funded the partnership and collaboratively determined eligibility criteria and policies for program implementation with New Hope. Sarah's supervisor, Rochelle Robinson, met on a regular basis with HUD to discuss program issues related to the pilot program.

4. What other organizations did New Hope serve alongside in the community?

As a housing service provider, New Hope provided emergency shelter services, rental properties, assisted living facilities, a home ownership program, and a loan assistance program. Other housing service providers in the community included Habitat for Humanity Fort Wayne. New Hope also served alongside housing resource organizations that advocated for housing policy issues or provided funding for housing service providers. The Indiana Planning Council on the Homeless and United Way of Allen County were two such organizations.

#### *Analysis*

5. [If students are required to do research on organizational partnerships:] What were some of the pros and cons of the partnership between HUD and New Hope? Did this partnership help New Hope meet its mission? How did the partnership benefit HUD?

Partnering with other organizations to provide services can be very beneficial to organizations, staff, and the clients they serve. Especially with two non-profit ventures, and the desire to forward the mission of both organizations, positive aspects of the relationship can abound.

New Hope hoped the partnership with HUD would allow them to reach families who could transition from Section 8 assistance to home ownership. The partnership might have allowed New Hope to reach more people in need than they previously did. Second, it provided opportunity for a greater range or greater amount of services. In this case, New Hope's home ownership program was able to assist HUD in transitioning clients from Section 8 assistance into home ownership. This allowed new clients to be served by Section 8 and more clients to gain self-sufficiency. A third opportunity in partnering allows organizations to share resources in a more collaborative manner. By partnering, New Hope and HUD learned from each other about housing needs within the community. This shared learning benefited their clients with improved services and strengthened the community through increased home ownership.

Some of the potential cons to the partnership may have included that generally partnerships with government entities require the other organization to adhere to governmental requirements, which may be a stretch for a smaller organization. Some of these requirements may include reporting requirements, staffing requirements (e.g., numbers and qualifications of professional staff), hiring restrictions related to faith, and requirements based on in-kind contributions (i.e., agency match). In addition, HUDs eligibility requirements may be more rigid than New Hope would have established in their own program. Finally, there may be some difficulties in negotiating joint standards if the faith-based organization is accustomed to being overt in addressing faith issues, or gives any preference to people of a particular faith.

The new pilot program appeared to fit well with New Hope's mission to "serve individuals, families, and communities through innovative housing programs as a response to God's call for social justice." This was a new housing program that provided assistance to individuals and families in need. In addition, by collaborating with New Hope, HUD was able to pilot test an innovative program, avoid hiring its own short-term program staff, more easily relinquish responsibility for the program (whether it succeeds or fails), and capitalize on New Hope's expertise and reputation with the local community.

6. How was New Hope's commitment to social justice operationalized in the programs they provided and the clients they served?

New Hope provided a full range of housing programs to their clients. This included emergency shelter services, rental properties, assisted living facilities, a home ownership program, and a loan assistance program. This full range of services and programs allowed the staff at New Hope to meet their clients at their level of need and empower them to reach their full potential.

More specifically, New Hope's efforts to operationalize their commitment to social justice included providing short-term and long-term housing opportunities to low-income individuals and families. They also provided opportunities through training classes for individuals and families to become competent home owners and move out of poverty. Finally, the work of New Hope strengthened neighborhoods in Fort Wayne by building a sense of community and ownership within the neighborhood.

7. As a nonprofit organization what challenges might New Hope face in the areas of leadership and fundraising?

New Hope had been in existence for close to 30 years. During this time they had become a valued resource and built a solid reputation in the community. Jon Powell, a dynamic leader, had served as Executive Director since 1990. The board



of directors appeared to be a strong force behind the organization, supporting the executive director and assisting with fundraising.

The organization had multiple sources of funding from state and federal governments, Christian churches, individual donors, and foundations. The multiple sources of revenue were important and necessary for a nonprofit organization. Without multiple sources of support, nonprofit organizations become overly reliant on one or two sources of funding, and if a source of funding is cut or community needs warrant a change of programming, funding would be a constraint. In addition, with only one or two sources of funding, a nonprofit organization may find that it is struggling with “mission drift” as it follows sources of funding rather than community needs and mission fulfillment.

8. How would New Hope’s services fit within a structure of support for people needing housing?

New Hope was a unique organization because it provided services along a continuum of need. New Hope was able to serve individuals and families who needed housing assistance at their level of need. If a family came to them needing emergency shelter services, rental housing, or were in a position to work toward home ownership, New Hope had a program to serve them. This unique continuum allowed New Hope staff the opportunity to see firsthand the struggles that families entering the home ownership program might face. In addition, with this knowledge they were better able to make changes to their programs and serve their clients more effectively.

In addition to the continuum of services provided by New Hope, the partnership program with HUD allowed additional opportunity to serve clients. As families receiving Section 8 assistance became more self-sufficient, they could move into New Hope’s home ownership program and realize the goal of owning their own home. The program provided more than a home to purchase. Three years of intensive classes and support gave families the resources they needed in order to maintain their homes and budget effectively, as well as the opportunity to interact with other families in the program and build a support network.

9. According to the Code of Ethics, what is Sarah’s responsibility to her client, her supervisor, and her organization, and society in this situation?

The NASW Code of Ethics focuses on a number of values, ethical principles, and ethical standards, which dictate the role a social worker should play in working with at-risk/special populations. The values and ethical principles emphasized in this case may include: service, social workers primary goal is to help people in need and to address social problems; social justice, social workers challenge social injustice; dignity and worth of the person, social workers respect the inherent dignity and worth of the person; and integrity, social workers behave in a trustworthy manner.

Additional Code of Ethic standards, which need to be considered in this case, may include the following:

**1.01 Commitment to Clients** - “Social workers’ primary responsibility is to promote the well-being of clients. In general, clients’ interests are primary. However, social workers’ responsibility to the larger society or specific legal obligations may on limited occasions supersede the loyalty owed clients, and clients should so be advised.”

**1.06 Conflicts of Interest** - “Social workers should be alerted to and avoid conflicts of interest that interfere with the exercise of professional discretion and impartial judgment. Social workers should inform clients when a real or

potential conflict of interest arises and take reasonable steps to resolve the issue in a manner that makes the clients' interest primary and protects clients' interests to the greatest extent possible. In some cases, protecting clients' interests may require termination of the professional relationship with proper referral of the client."

**1.07 Privacy and Confidentiality** - "Social workers should respect clients' right to privacy. Social workers should not solicit private information from clients unless it is essential to providing services or conducting social work evaluation or research. Once private information is shared, standards of confidentiality apply."

**2.03 Interdisciplinary Collaboration** - "Social workers who are members of an interdisciplinary team should participate in and contribute to decisions that affect the well-being of clients by drawing on the perspectives, values, and experiences of the social work profession. Professional and ethical obligations of the interdisciplinary team as a whole and of its individual members should be clearly established."

**4.04 Dishonesty, Fraud, and Deception** - "Social workers should not participate in, condone, or be associated with dishonesty, fraud, or deception."

10. How may Sarah's perception of whether Ms. Washington intended to deceive influence her decision to report the situation?

Sarah may question whether Ms. Washington was aware that she was receiving benefits from the Section 8 program for which she was not eligible because she willingly disclosed her income to Sarah during the Friday morning meeting. Ms. Washington did not, however, disclose this information on her application for the New Hope program, perhaps raising more questions for Sarah about what Ms. Washington did or did not know.

If Sarah believes that Ms. Washington did not intend to deceive, she may be more open to encouraging Ms. Washington to disclose the information to the Section 8 program and update her income with that office. Sarah may also be more willing to wait for Ms. Washington to find an alternative housing option. If, however, Sarah believes that Ms. Washington did intentionally deceive, she may have less patience for the situation, especially given how many families she has interacted with who truly need Section 8 housing assistance.

11. To determine dishonesty, fraud, or deception, does it matter whether the Washingtons' income exceeds the eligibility criteria by \$40, \$400, \$4,000, or \$40,000? Does it matter whether there was intent to deceive?

Technically, the amount that income exceeds eligibility criteria neither creates or excuses dishonesty, fraud, and deception. However, it will often influence our assessment of it and how we respond. Likewise, incomplete reporting (e.g., income, marital status) may reflect an honest mistake or confusion rather than an attempt to deceive. And that assessment may also influence how we respond. As a social worker Sarah has an obligation to abide by the Code of Ethics Standard 4.04. How she interprets and applies this standard to her current situation is important.

12. If Sarah experiences Ms. Washington as pushy, aggressive, evasive or belligerent, how may this influence her inclination to report her for fraud?

A client's difficult personality or interpersonal skill deficits should not

determine whether a social worker reports the client for fraud. Because a difficult client elicits less sympathy or concern, however, it may be easier to report such a client. Or, feelings of anger may provoke retaliation. Conversely, a social worker may fear negative reaction or even retaliation by the difficult client.

### *Action*

13. What options does Sarah have in this situation?

Sarah's immediate options in this situation are to report or not report Ms. Washington to her supervisor. If Sarah disagrees with Rochelle's response to the situation, however, she may also need to decide whether to report the information herself. She may choose to report this to Rochelle's supervisor or another administrator at New Hope or may choose to report this information to HUD.

If either Sarah or Rochelle decide to report this situation to HUD, she must also decide how to do so. For example, she could make a telephone call or write a letter to Ms. Washington's case manager at HUD, make a telephone call or write a letter to a local HUD administrator, or submit an anonymous fraud report to the regional HUD office. The first options seem most sensible in the case of incorrect or incomplete case information, while the latter option seems most appropriate for situations involving overt fraud and cover up on a larger scale.

14. What are the pros and cons of these options for Sarah, for Rochelle, and New Hope?

Sarah may choose not to report the situation immediately to her supervisor to allow herself more time to talk with Ms. Washington and determine whether she had intent to deceive. This opportunity may have a positive result for building trust and rapport with Ms. Washington but it also puts Sarah in a different role as she becomes more of an investigator of fraud. This option may put Rochelle in a difficult position because she is planning to attend the HUD partnership meeting and is not fully aware or up-to-date on the program situation. Finally, if Sarah chooses to withhold this information and it is later discovered, this could have implications for New Hope and the partnership with HUD.

At the same time, if Sarah discloses the situation to her supervisor, Rochelle must decide whether and how to report it to HUD. Sarah may feel relief from passing this decision on to her supervisor but it will not necessarily remove her from further responsibility or action (see question #18). In addition, Rochelle must decide how to best proceed, given the information she has about Ms. Washington, and given the broader implications this specific situation could have for the partnership program. If, for example, Rochelle decides that this information should be reported to HUD by telephone through an anonymous fraud report she still must decide if she should share this information at the 9-month pilot partnership meeting. While the details of Ms. Washington's case may not rise to the level of importance for the partnership meeting, it may be important for both organizations to discuss and agree upon a policy or protocol for handling such situations. If Rochelle raises the broader issue in the partnership meeting and works to establish a policy for future cases, it would serve both organizations.

15. If Sarah decides to report this situation, what alternatives can she provide to Ms. Washington? In addition, if she decides to report the situation, is she obligated to inform Ms. Washington about her decision?

Sarah has a commitment to her clients, as part of the NASW Code of Ethics. Because of this commitment she cannot simply abandon Ms. Washington in her need for housing. Sarah should offer additional resources to Ms. Washington to meet this need. Sarah already offered Ms. Washington information about New Hope's Loan Assistance Program and she should take steps to offer her additional resources in the community. Sarah and Ms. Washington may find that the alternatives they come up with may actually be better than the situation before.

If Sarah does decide to report the situation she should disclose this information to Ms. Washington. Reporting will impact Ms. Washington's housing situation and have implications for her family. Sarah needs to be honest and upfront about why she needs to report the situation, based on her commitment to the Code of Ethics and HUD policy, but also needs to be a resource and support for her client. Of course, Sarah must be aware that disclosing this information to Ms. Washington will impact their relationship and must take steps to safeguard the relationship by being honest about the need to report and by being supportive to her client by providing alternative solutions and resources.

16. If Sarah chooses not to report the situation, is she an accomplice to fraud? How might HUD's perspective differ from New Hope's perspective related to fraud?

According to the NASW Code of Ethics, 4.04 Dishonesty, Fraud, and Deception, "Social workers should not participate in, condone, or be associated with dishonesty, fraud, or deception." Sarah is aware of some level of dishonesty, fraud, and deception in this case simply by knowing that Ms. Washington is receiving assistance through a program for which she is not eligible. Sarah did not know whether the dishonesty, fraud, or deception was an intentional cover-up by Ms. Washington, an oversight on the part of the Section 8 program, or a delay in reporting increased family income. Regardless, once Sarah knew that Ms. Washington was receiving services from the Section 8 program for which she was not eligible, she is aware of dishonesty, fraud, or deception taking place. Again, this dishonesty, fraud, or deception may not be a direct result of actions by Ms. Washington. It could be a mistake on the part of the program. Nevertheless it needs to be reported or Sarah is an accomplice to the fraud. In addition, if Sarah withholds information from her supervisor which may have an impact on the pilot program she also could be considered an accomplice to the fraud.

Because the Section 8 program is a HUD program, their perspective on fraud in this situation may be different from New Hope's perspective. New Hope, as a service provider directly involved with clients, may tend to focus on Ms. Washington's housing needs and consider the spirit of the rules. They may also be more concerned about fraud in their own program than another agency's program. HUD, as a large bureaucracy somewhat removed from individual clients and their circumstances, may adhere more closely to the rules and guidelines of their programs. In general, one could argue that Sarah has done due diligence on Ms. Washington's financial information and is not allowing her to enroll in the program because of her financial status- thereby not allowing fraud or deception to occur in the New Hope program.

17. [Potential follow-up question to explore the issue more broadly:] This discussion may raise other questions about the role of a social worker or agency in "policing" fraud. For example, is a social worker responsible for reporting other violations of federal or state law or agency policy? For

example, what about traffic (e.g., speeding, DUI), tax, immigration, school truancy violations, or child abuse?

Social workers are specifically required by federal law to report child abuse. For most other violations of law or policy, they have no more or less responsibility than other citizens to report. However, their employment experiences sometimes provide unique knowledge of violations, thus raising difficult questions about their responsibility for reporting these violations.

18. If Sara reports this issue to her supervisor, does that relieve her of responsibility for it? Or does her personal integrity require she do something else with it?

As discussed above, Sarah may believe that simply reporting the situation to her supervisor, Rochelle, will relieve her of responsibility for it. This may not, however, be the case as she was part of the disclosure of this information and may believe that her own personal integrity requires her to report this. It could be argued that Sarah still has an obligation to report the situation based on the NASW Code of Ethics (4.04) regardless of the fact that it was reported to her supervisor. This could especially be the case if her supervisor, Rochelle, decided to do nothing about the situation.

19. How, if at all, should Sarah's concern for personal integrity stemming from both her Christian faith and professional role effect her decision? Does one require more than the other?

Sarah's integrity, both as a social worker and as a Christian, is on the line in this situation. She is knowledgeable of a situation where a client is committing fraud within the system. Sarah has a duty to uphold the value of integrity in her professional role. She must weigh the ethical dilemmas in the situation but also take responsibility for the information she knows in this situation. As a Christian social worker, she is held to a high standard and must be responsible in her decision.

According to Sherwood (2008) "the key to integrating Christian values into professional practice (as in all of life) is making complex judgments based on wisdom growing out of the mind and character of God, incarnated in Jesus Christ" (p. 342). As a Christian social worker, Sarah's concern for personal integrity and her decision must reflect the mind and character of Christ. Sherwood (2008) goes on to say these judgments are more complex than legalism or relativism. More specifically, he states, "These decisions require our knowledge of the character of Christ to make and they require that we be disciplined disciples at least beginning to take on the character of Christ ourselves to carry them out" (p. 342). It is for this reason that Sarah's Christian faith does require more of her than her professional commitments.

### *Reflection*

20. What will working with clients be like if I am extremely emotionally connected or very emotionally disconnected with them? What challenges might I have with maintaining appropriate boundaries and rapport with my clients while still providing quality services?
21. Would I ever consider participating in a partnership venture between two organizations with very different auspices? Would the benefits outweigh

the risks? How might my involvement advance social work professional practice? Improve my organization? Better the lives of my clients?

22. In the case Sarah makes a judgment about who is deserving of assistance and who is not deserving of assistance. What feelings do you have about potential clients who you would see as deserving assistance and clients you would see as not deserving assistance? How do you think this would be evidenced in your practice?
23. Consider the following eligibility dilemma posed by social policy scholars: Would you rather serve all people in need, including a few who do not actually qualify, or only those who qualify, at risk of missing some who are in need?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Assign students to research the United States Department of Housing and Urban Development (2010) web site and answer the following questions: What housing programs are available in your community? What are the eligibility requirements for these programs (income, household members, etc.)?
2. Assign students to research one partnership venture between two non-profits and one joint venture between a non-profit organization and a for-profit organization (e.g., these may include Cancer Research for Women and Mary Kay Cosmetics or the American Heart Association and Quaker Oats). How are these two types of partnerships different? What are the benefits and challenges of these different types of partnerships?
3. Before class, divide students into small groups. Assign students to identify organizations in their local communities (or community of future employment) which provide housing services and review the eligibility requirements for their programs.
4. Assign readings on professional ethics from secular (e.g., Reamer, 2006) and Christian perspectives (e.g., Sherwood, 2008). Ask students to identify similarities and differences in their approaches to ethical decision making.
5. Assign students to read and discuss an article about whistleblowing by social work students (Mansbach & Bachner, 2009). Consider what a student should do in a situation when his/her supervisor is not concerned with a potential ethical violation. How would students handle this in field or practice?

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

**Print**

- Cnaan, R. A., & Boddie, S. C. (2002). Charitable choice and faith-based welfare: A call for social work. *Social Work, 47*, 224-235.
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- Koopman, D. L. (2002). Faith-based initiatives: An essay on the politics of social service change. In B. Huguen & T. L. Scales (Eds.), *Christianity and Social Work: Readings on the integration of Christian faith and social work practice*. (2<sup>nd</sup> ed.). Botsford, CT: North American Association of Christians in Social Work.
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- Lewis, B. M. (2003). Issues and dilemmas in faith-based social service delivery: The case of the Salvation Army in greater Philadelphia. *Administration in Social Work, 27*(3), 87-105.
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- McKeever, G. (1999). Fighting fraud: An evaluation of the government's social security fraud strategy. *Journal of Social Welfare & Family Law, 21*(4), 357-372.
- Murray, H. (2000). Deniable degradation: The finger-imaging of welfare recipients. *Sociological Forum, 15*(1), 39-64.
- Reamer, F. G. (2006). Ethical dilemmas and decision making: A framework. In *Social work values and ethics*. (3<sup>rd</sup> ed.; pp. 43-86). New York: Columbia University Press.
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- Staral, J. M. (2000). Building on mutual goals: The intersection of community practice and church-based organizing. *Journal of Community Practice, 7*(3), 85-95.
- Stone, D. (2008). *The Samaritan's dilemma: Should government help your neighbor?* New York: Nation Books.

Swan, R. S., Shaw, L. L., Cullity, S., Roche, M., Haplern, J., Limbert, W. M., & Humphrey, J. (2008). The untold story of welfare fraud. *Journal of Sociology and Social Welfare*, 35(3), 133-151.

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# Aiding or Abetting Abortion?: Teaching Notes

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## Case Synopsis

Erika Burkholdt was a MSW foundation-year social work student assigned to work at a faith-related agency serving prostitutes in Kansas City, Missouri. Erika was forced to confront her position about abortion when, during the first week of field placement, her supervisor asked her to transport a client to an abortion surgery clinic. The client, Cali Nelson, was married, involved with prostitution, and addicted to crack. Cali struggled with a stormy marriage and decided not to tell her husband about the pregnancy for fear that he would again throw her out of the house. Cali already had two children and minimal parenting skills. The home environment appeared unstable, meager, and not hygienic. As the situation progressed, Erika felt increasingly conflicted about the possibility that abortion was killing and about her role in it.

## Intended Case Use

Written for a master's level capstone course in social work, the case may also be used for graduate level courses on death, dying, and grief or for specialized instruction on abortion, client self-determination, social work values and ethics, conflict between personal and professional values, field education, and supervisory relationships.

## Learning Outcomes

As suggested above, instructors may use this case across a variety of courses and for multiple teaching purposes. The depth and complexity of the case provide adequate data for these multiple uses, and discussion of the case may result in different learning outcomes. However, no single discussion will likely accomplish all or even most of the outcomes identified here. We simply list possible outcomes to help instructors select a case to achieve particular learning outcomes in a content course or to anticipate outcomes they may seek in an integrative course.

Depending on the particular course and discussion focus, students will learn:

1. How personal beliefs/feelings about a controversial social issue may influence practice decisions.
2. Recognize or consider diverse complicating factors/dynamics/consequences of abortion or no abortion (grief, moral, political, economic, child abuse):
  - a. Causes/needs/pressures for abortion.
  - b. Impediments/risks/consequences of abortion.
3. To think comprehensively about multiple aspects of the abortion issue.

4. Awareness of their own values and ethical positions regarding controversial issues.
5. Awareness of how their personal values and ethical positions do or do not mesh with the NASW Code of Ethics, and how to handle potential conflicts.
6. Awareness of how their personal values and ethical positions and professional ethics do or do not mesh with client self-determination, and how to handle potential conflicts.
7. The appropriate responsibilities and limits of the field student role.
8. How agency auspice may limit the practice options available to social workers.
9. A student's right to question a supervisor's practice as well as agency policies and practices, and to ask that alternatives be considered.
10. To recognize and consider their own discomfort as an element in practice decision making, along with many other factors.
11. To identify the limits of their knowledge and skill as novices, how to extend that knowledge and skill quickly in novel situations, and how to recognize and respond in situations when they cannot do so adequately or quickly enough.
12. The importance of mutual respect and a reciprocal relationship between supervisors and supervisees, especially at the outset of the supervisory relationship.

### **Discussion Questions and Answers**

Instructors may use various combinations of the following questions, depending on what aspects of the case they wish to explore or emphasize. For particular purposes, they may need to develop their own additional discussion questions. We do not intend the responses as "right answers" so much as aids to thought and reflection on the case material.

The discussion questions are organized in four sequential categories: a) facts - to clarify potentially unfamiliar or confusing information in the case at the outset of the case discussion; b) analysis - to illuminate the basic dimensions and often controversial issues in the case, and to encourage students to think critically and across system levels; c) action - to consider costs and benefits, intended and unintended consequences, and ethical implications of various courses of action, and urge students to develop and recommend a specific course of action; and d) reflection - to encourage students to explore their personal reactions to aspects of a case or personal qualities that may affect their professional "use of self."

#### ***Facts***

1. What were the past and current auspices of the Lighthouse program? How was it funded?

Founded in 1987 by members of a Methodist congregation, the program was eventually turned over to New Life-Kansas City, a large, well-established faith-related organization. Lighthouse's \$100,000 annual budget came primarily from three sources: one third from Kansas City United Way, \$50,000 from a private donor, and \$15,000 from the organization's general fund.

2. What do we know about Stacey Dalpaz and Erika Burkholdt?

Stacey Dalpaz was supervisor of the Lighthouse program, a program operated by New Life-Kansas City that helped women and men who were coming out of prostitution as well as their children. She had an MSW and 12 years of experience as a sexual trauma social worker. Stacey was highly committed, often working 6 or 7 days per week and seeming to go out of her way to assist her clients. Stacey was good at seeing positive aspects of an individual or situation and would never refuse service to a client. Stacey was the field supervisor for Erika Burkholdt.

Erika Burkholdt was a 25-year-old MSW student working under Stacey's direction in a foundation year field placement. At the time of the case, she had only been working at Lighthouse for three days. Erika had an undergraduate degree in sociology from Benedictine College, a small liberal arts college in rural Kansas. She was raised in a Catholic home and taught that abortion was wrong. As a young adult, she came to believe in a woman's right to choose abortion but remained highly conflicted.

3. How did the current situation come about? What led up to Erika's predicament?

Stacey telephoned Erika before work and instructed her to transport a Lighthouse client, Cali Nelson, to Planned Parenthood for an abortion. Erika initially agreed to do as instructed but grew increasingly uncomfortable with the idea of helping the woman get an abortion. Erika struggled between the question of fostering a client's right to self-determination and personal opposition to abortion. When they arrived at Planned Parenthood, Erika accompanied Cali inside and took a seat to wait for Cali. As they waited, Erika contemplated what she was doing and felt growing anxiety and discomfort.

4. What was Erika's position regarding abortion? What were her thoughts and reservations about abortion?

In short, Erika was deeply conflicted about abortion. Though raised to believe that abortion was wrong, Erika had come to believe that other people should have the right to choose abortion. But the assignment to assist Cali in getting an abortion forced Erika to face her profound ambivalence directly. She struggled with questions, "When does a fetus become a baby?" and "Is this killing a baby?" While abortion was inconsistent with her personal values (i.e., she would not get an abortion herself), she was also committed to allowing others the right to choose. Ironically, compelled by her field instructor, she did not feel her own actions were freely chosen in the current situation.

*Analysis*

5. Was it reasonable for Stacey to ask Erika to accompany Cali to Planned Parenthood for an abortion?

At minimum, it was inconsiderate of Stacey to ask Erika, on short notice, to accompany Cali to Planned Parenthood for an abortion because Stacey did not know how Erika felt about this controversial issue. The situation was additionally difficult because Erika was only in her first week at the agency and had not yet met the client she was assigned to transport.

More profoundly, Stacey's impromptu request may result from her difficulty setting and maintaining boundaries, for herself and for others. It reflects inadequate care and attention to the needs of a field student.

6. How may agency auspice affect the choices Erika needs to make?

Students (and employees) need to understand and comply with agency policies, unless they disagree with these policies on prudential or ethical grounds. In such situations, they must decide how to deal with these policies.

In this case, Erika's field placement was with a faith-affiliated organization that may have policies regarding abortion. Because she was so new to the placement, Erika did not yet know about these policies or whether Stacey's instructions were consistent with them. Awareness of such policies may provide helpful guidance for Erika but would not eliminate the need for her own ethical decision making.

7. What was the source of Erika's reservations about abortion?

In this case, Erika's religious background apparently played a significant role in her personal opposition to abortion. It is not clear whether or to what extent her opposition was supported by ideas about the nature of personhood, rights to protection, and the ethics of choice. Although she apparently came to accept the right to abortion during college, she remained personally opposed.

8. [If students have been assigned to explore this:] What research exists which surrounds issues of grief and loss related to abortion? Does Erika have any responsibility to prepare Cali for any potential issues of grief or loss?

Research outcomes vary in their assessment of issues of grief and loss related to abortion. For example, pro-life groups such as Right to Life and Project Rachel show research which links women who have had an abortion to issues of grief, anger, guilt, and despair (see Angelo, 1992). Pro-choice groups such as the Alan Guttmacher Institute claim that no clear evidence identifies mental health issues for women who have had an abortion (see Cohen, 2006). Given that the research varies, one could argue that preparing Cali may assist her in case she encounters issues of grief and loss. On the other hand, one could argue that attempting to address issues of grief and loss may invoke undue stress on Cali at a potentially vulnerable time.

9. How may psychosocial factors in the case influence Cali's decision to abort?

Several factors complicate the situation. For example:

Poverty: Because of her family's poverty, Cali may have considered the financial responsibilities of having and raising a child.

Drug abuse: If Cali were using illegal drugs, she may have feared possible negative consequences for her unborn child.

Possible sexual affair: If Cali was pregnant by someone other than her

husband, she may have sought the abortion to avoid angering her husband and risking expulsion from the house.

10. What are some alternatives to abortion? Would it be appropriate for Erika to raise some of these alternatives with Cali at this time? Why or why not?

An alternative to Cali having an abortion would be for her to carry the baby to full term and either choose to raise the child or place the child for adoption. It appears that Cali made a deliberate decision about having an abortion because she had the appointment before arriving at Planned Parenthood. However, we do not know how far in advance this appointment was made or to what extent Cali discussed abortion alternatives with Stacey.

Some students may argue that anytime before Cali would have this abortion is fine to discuss alternatives with her. Even at this late point, it may be appropriate for Erika to ask Cali how she arrived at this important decision (e.g., "This is a big decision. How did you go about making this decision?") and whether she has any questions or concerns about it. This could help Erika to assess how informed and thoughtful Cali seems to be (i.e., how self-determining she really is).

Other students may challenge this by saying her mind was made up and it would be best to work with this client on preventing future pregnancies. Given the situation that Erika is in, including the fact that Cali is not "her client," it may not be appropriate to "second guess" Cali's decision or the process she went through with Stacey to make this decision.

11. How may factors in the case (e.g., poverty, mother's drug abuse, possible sexual affair, feared child maltreatment) influence Erika's assessment of her own willingness to have part in it?

Poverty: In making an assessment of how she feels, Erika may have considered that the family was in poverty and could have seen reasons for why Cali should not have had the baby or could have encouraged Cali to put the baby up for adoption.

Mother's drug abuse: Erika may have considered the damage that Cali had the potential to cause if doing drugs while pregnant, and thought it best to abort.

Possible sexual affair: Erika may have understood why Cali would not want to tell her husband about the affair, thus not telling him about the baby and thinking abortion is the best option.

Feared child maltreatment: If Erika was concerned about child maltreatment, she may have thought it best for Cali not to have another baby who would have been likely mistreated and supported the abortion or she may have suggested that Cali have the baby but place the baby for adoption.

Depending on the nature and strength of her beliefs about abortion, however, Erika may not have thought any of these reasons provide sufficient justification for Cali's decision to abort her baby.

12. At this point in the case Cali is the identified client. How would the case change if Erika considered the fetus/baby her client? What responsibility does she then have for the fetus/baby and for protecting the rights of the fetus/baby?

If Erika considered Cali's fetus/baby her client, this places significant demands on her role in the case and calls into question her support of Cali's

decision. It becomes necessary for Erika to attempt to protect the life of the fetus/baby.

13. What are the relevant principles or guidelines in the NASW Code of Ethics that relate to Erika's dilemma?

Several ethical principles relate to Erika's dilemma. She must especially consider what constitutes social justice in this situation, the dignity and worth of persons, and the importance of human relationships. Further complicating the situation, she must decide to whom these principles apply (e.g., Cali, her husband, her fetus/baby). In this case, that decision may be the most critical and influential. But she must also consider her level of professional competence and how to maintain personal integrity.

14. How do you resolve situations in which parts of the NASW Code of Ethics come into tension with each other, when any course of action you have will require you to prioritize one ethical principle over another?

As the code itself indicates, the code does not prescribe which principles "are most important and ought to outweigh others in instances when they conflict" (NASW, 2008, ¶7). Several models of ethical reflection recommend, for example, prioritizing life and health of people over their self-determination. In this case, that recommendation requires a prior decision about the personhood of the fetus/baby.

15. How did Erika's student role and lack of familiarity with the agency influence her predicament?

As both a student intern and a newcomer to Lighthouse, Erika was unsure of her duties and responsibilities. Erika no doubt realized her inexperience, compared to Stacey. She may have assumed that if Stacey assigned this task, it must be okay. Furthermore, Erika wanted to make a good impression on her field instructor and therefore had reservations about not doing what Stacey wanted her to do.

She was also unsure initially of the agency's stand on abortion. Had she realized that New Life opposed abortion, she may have experienced the ethical dilemma quite differently. Instead, she could have declined to assist with transporting the client to avoid violating the agency's rules and regulations.

16. What were the various points at which/steps in the process by which Erika recognized her discomfort? How did Erika realize her discomfort in this situation?

Social workers, and especially students, do not always immediately recognize when situations and circumstances will make them uncomfortable. They may not be able to say how we would handle a situation or circumstance until put in the middle of it.

As soon as Stacey asked Erika to transport Cali to Planned Parenthood for an abortion, Erika felt a tinge of discomfort. On the telephone, however, Erika did not initially realize how conflicted she would eventually feel in this situation. Erika became aware of her growing discomfort on the way to the agency (to pick up a car), on her way to pick up Cali, on the way to Planned Parenthood, while sitting in the waiting room, and most intensely when Cali asked that Erika accompany her into the surgery room.

17. How did time constraints influence Erika's response?

Stacey instructed Erika to pick Cali up at 9:30 am for the 10:00 am appointment. Because Stacey called at 8:45 am, Erika had little time to talk with Stacey or anyone else before following through on the assignment. Furthermore, because of the short notice and time constraints, Erika did not have much time to reflect on her feelings about the assigned task.

18. Does accompanying Cali through the abortion procedure involve different responsibility than merely transporting her to the appointment?

Some may argue that merely transporting Cali to the appointment is a different level of engagement and responsibility than accompanying Cali through the abortion procedure. From this perspective, it was Erika's responsibility to take Cali to Planned Parenthood on time for the appointment; what happens subsequently did not directly involve Erika. Others may argue that various types of assistance (e.g., making an abortion provider referral, providing transportation, accompanying a client through the procedure, providing follow-up care) represent differing levels of involvement and culpability.

19. Does it change your responsibility / culpability if you cannot do something but find someone else who will?

In general, if social workers cannot provide a needed or requested service to their clients, it is their responsibility to refer to someone who could provide the service. The issue becomes more complicated, however, when social workers have personal and/or ethical reservations about the particular service. Some will argue that making referrals reduces their responsibility / culpability because they are not directly involved in providing the service. But others will argue that it does not reduce their responsibility / culpability because they are still enabling clients to obtain the service. Some social workers may take a middle ground: providing the referral, in recognition of the client's right to self-determination, but expressing explicit personal reservations.

#### *Action*

20. If Erika truly believes Cali is under the influence of drugs or alcohol, what should she do with this information? What duty or responsibility does she have as a social worker if her client is making a significant decision while under the influence of a substance?

Given the circumstances and her role as a student intern, Erika should attempt to report this information and seek guidance from her supervisor or, in her absence, an agency administrator.

In addition, Erika should report this concern to the clinic physician. If Cali is under the influence of a substance, it may interact with whatever anesthesia is used during the abortion procedure.

21. How can Erika sort out her conflicting concerns?

Under the circumstances, Erika had little opportunity for discussing or otherwise sorting out her concerns. At that point, she could simply refuse to provide further support to Cali. Given the irreversible nature of an abortion, Erika could seek to delay it until gaining clarification from Stacey about the

process she went through with Cali in discussing the abortion and making this decision.

22. What alternatives did Erika have in the waiting room at PP?

Once there, she should not leave Cali at the clinic without a ride home. However, Erika could decide to accompany Cali through the abortion procedure or remain in the waiting room. Accompanying Cali may violate her conscience, deepening Erika's sense of personal involvement with and responsibility for the abortion. However, she could also conclude that the decision to abort was already made by Cali (and others) and that accompanying Cali was simply following orders or doing her job or providing companionship.

Time permitting, Erika could call Stacey Dalpaz to clarify and confirm Stacey's expectations for her. As a novice, Erika simply does not know what Stacey would typically do or say in such a situation. On the phone, Erika could also express her clinical and moral concerns, and her growing discomfort and ambivalence. Erika would probably want to make this call outside the earshot of Cali and others at the clinic. It's possible that this conversation would generate additional ways of responding.

23. What should Erika do?

Given her deep personal reservations, Erika may choose to remain in the waiting room rather than accompany Cali to the operating room. Alternately she may decide to respect her client's decision to abort and her request for accompaniment. This will depend on what she concludes about the nature of her role and responsibility in this situation.

24. If assisting with a client's abortion violates agency policy, how may that affect Erika's decision in this situation? What, if any, obligation does Erika have to report this situation to Stacey's superiors?

If Erika knew assisting clients with abortions violated agency policy, that would provide an additional reason for refusing to transport or accompany Cali. It would not, however, alter the fundamental moral decision for Erika.

First, Erika would need to confirm and clarify the policy information in some way. Second, to avoid secrecy and surprises, she should talk with Stacey about the apparent policy violation before reporting it to administrators. As a student, she may also wish to consult with a field liaison from her college or university before pursuing this matter with her field supervisor or agency administrators.

### *Reflection*

25. How may differing levels of involvement affect your sense of responsibility for client's actions?

26. How far can you go to help a client do something with which you disagree, and how do you decide how far to go? [e.g., helping a woman return to her abusive husband because she believes it is her religious responsibility to submit to her husband]

27. How important is your sense of comfort/discomfort for deciding what to do? What other personal factors besides your discomfort influence your decisions?



28. Where do you turn for guidance regarding profound moral issues such as this? How do you resolve any resulting conflict with professional values and ethics?
29. What do you think about Cali getting an abortion compared to a woman in a different situation? Does the family situation influence your perspective on abortion? In your mind, is abortion ever an option for your clients?
30. How does this case affect your thoughts about referring a client to another worker? How would you deal with a similarly unavoidable situation?
31. If you disagree with your supervisor on a moral issue such as this, how will you deal with the relationship and the disagreement?
32. How does language affect one's understanding of abortion (e.g., abortion as "murder" or a "medical procedure")?

### Teaching Suggestions

To deepen and enhance the in-class case discussion, an instructor may draw upon the following supplemental activities.

1. Have students research what state or federal laws potentially apply in this case. See the following website: <http://www.guttmacher.org/sections/abortion.php> and click on the PDF link updated monthly: An Overview of Abortion Laws. For example, what would Cali be told before she has an abortion procedure in your specific state? Is there a waiting period? Are public funds used to provide abortions?
2. Assign students to research the issue of grief and loss in abortion. Alternately, assign readings on this topic (e.g., Angelo, 1992; Layer, Roberts, Wild & Walters, 1994)
3. Have students compare and contrast abortion in the United States and abortion outside of the United States. What does research show as differences between countries?
4. Critique a policy brief about an issue related to abortion. For examples, see "State Policies in Brief" at <http://www.guttmacher.org/sections/abortion.php?pub=spib>. Alternately, critique the policy brief on abortion from NASW in *Social Work Speaks*.
5. In pairs or small groups ask students to talk through the reflection questions. Following class, have them journal the thoughts or feelings they experience as a part of this exercise.

### Resources

To prepare for leading the case discussion, instructors may review the print or electronic resources below. Instructors may also select reading assignments from these resources to aid student preparation.

*Print*

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