**Generalist’s Tasks Checklist**

**Work with Individuals**

* Read client case records, agency reports that pertain to individuals.
* Attend and observe client intakes, interviews, assessments and take notes for supervisory discussion.
* Attend interdisciplinary conferences and case presentations on clients as an observer or participant.
* Learn and practice working with diverse ethnicities and belief systems.
* Attend court hearings for clients.
* Go through the service delivery systems as if you were a client.
* Make home visits to individual clients.
* Conduct interviews with clients and provide direct services.
* Write an assessment or case summary on a specific case for an individual client.
* Understand and practice cultural competency when working with different cultures, ethnicities, abilities, and sexual orientation in work with individuals; utilize process recordings for these experiences.
* Carry a client caseload when sufficiently prepared.
* Keep a daily log of experiences with clients in the field and reactions to them.
* Interview individuals who have received services from the program to assess their responses to the experiences.
* Observe the atmosphere of a waiting room, facility, or organization where clients typically utilize services.
* Participate in group or peer supervision related to individual client work.
* Act as a consultant or advocate for an individual.
* Process-record, verbatim, interactions with clients.
* Role play client interactions that illustrate: an intake interview, crisis management, or evidenced based intervention.
* Demonstrate properly written documentation and utilize language that is strength based and family centered.
* Work toward condensing a client report paying attention to unnecessary words, run on sentences, and repetition of content.
* Understand evidenced based interventions (Trauma-informed, Motivational Interviewing) and determine usefulness based on client’s needs.

**Work with Families**

* Read case records or agency reports that pertain to a family you are working with.
* Attend and observe an intake, interview, or assessment of a family you are working with and take notes for supervisory discussion.
* Observe the atmosphere of a waiting room, facility, or organization where a family you are working with uses services.
* Attend interdisciplinary conferences and case presentations on families as an observer or participant.
* Learn and practice working with diverse ethnicities and family cultures.
* Attend professional workshops, seminars, and lectures in the community on topics relating to families.
* Attend a court hearing for a family.
* Go through the service delivery systems as if you were a member of one of the families you are working with.
* Make home visits to a family.
* Conduct interviews with families and provide direct services.
* Write an assessment or case summary on a specific case for a family you are working with.
* Carry a limited caseload, when sufficiently oriented, with families.
* Keep a daily log of experiences with families you are working with in the field and reactions to them.
* Understand and practice cultural competency when working with different cultures, ethnicities, abilities, and sexual orientation in work with families.
* Participate in group or peer supervision relating to a family you are working with.
* Interview families who have received services from the program to assess their responses to the experiences.
* Act as a consultant or advocate for a family.
* Process-record, verbatim, interactions with families.
* Demonstrate properly written documentation and utilize language that is strength based and family centered.
* Understand evidenced based interventions and determine usefulness based on the family’s needs.

**Working with Groups**

* Observe a social worker facilitating a group.
* Co-facilitate a group.
* Set up a new group based on the population’s needs or facilitate a group that is already established.
* Act as an advocate for a group.
* Understand and practice cultural competency when working with different cultures, ethnicities, abilities, and sexual orientation in the group process; utilize process recordings for these experiences.
* Facilitate a group with an oppressed population or with individuals of varying ethnicities.
* Complete a process recording on the group process.
* Simulate and record a group session with peers.
* Review the group process with supervisor and work on skills for effective group work.
* Attend a group as a participant and observe the facilitator’s style.
* Visit agencies that specifically serve members of minority groups, (i.e. refugee programs, women’s centers, LGBTQ community centers, and advocacy groups for persons with disabilities). Ask how their programs differ from yours.

**Working with Organizations**

* Interview individuals who have received services from the organization and assess their responses to the experience they have had.
* Attend orientation and review the organization’s policy and procedure manual.
* Work with supervisor to understand and analyze the agency’s (or program’s) budget.
* Join and participate in local/national professional organizations.
* Plan and conduct an in-service training session or course.
* Plan, lead, and conduct a fundraising activity.
* Prepare a grant proposal.
* Attend any open staff or committee meetings to observe employee interaction.
* Walk around/explore the building. Locate potentially critical features such as emergency exits, fire alarms, and fire extinguishers.
* If appropriate and feasible, work with a variety of social workers, supervisors, and managers in the agency to observe differing supervision styles.
* Study the agency’s organizational chart.
* Reflect on and discuss the types of diverse populations the organization services.
* Attend organization’s/agency’s board of directors or advisory board meetings and consider how the topics relate to the agency’s mission, goals, programs, and funding
* Examine agency’s monthly, quarterly or annual reports to understand its goals and performance.
* Find out how ordinary citizens or the general public view the agency or organization. Speak with friends and acquaintances who know little about social work and ask what they know or have heard about the agency.
* Attend public meetings sponsored by the United Way or other social welfare planning groups in order to better understand how the agency fits into the overall social welfare system.
* Visit other agencies that provide similar services and compare approaches and programs.
* Locate and study community resource directories, census data, and historical materials to help deepen understanding of a particular social problem addressed by the agency.
* Examine data-gathering and assessment tools and instruments used in the agency.
* Identify the beliefs, values, and assumptions implicit in the perspectives, theories, and models used in the agency.
* Understand and practice cultural competency when working with different cultures, ethnicities, abilities, and sexual orientation in work within organizations; utilize process recordings for these experiences.
* Ask social workers or other professionals to describe how they and the agency determine whether they are being effective in their work with clients.
* Attend cultural and religious celebrations and activities that are meaningful to many of the clients or consumers served by your agency.
* Invite respected members of various ethnic and religious groups to explain how cultural and religious factors might influence clients’ perceptions of the agency’s programs and services and whether they would be inclined to use those services.
* Listen to music and read books and poetry by members of cultural or minority groups served by the agency.
* Visit agencies that specifically serve members of minority groups, (i.e. refugee programs, women’s centers, LGBTQ community centers, and advocacy groups for persons with disabilities). Ask how their programs differ from your agency’s.
* Examine assessment tools used in the agency to determine if they are culture bound or culturally inappropriate.
* Attend local chapter meetings of NASW or meetings of other social work-related professional organizations and decide what issues are of greatest concern to the social workers in the community/state.
* Interview experienced social workers and ask them to describe the ethical issues they must often encounter and the issues that are especially difficult for them to resolve.
* Interview experienced workers. Ask about their level of job satisfaction, as well as the pros and cons of a career in social work. Ask them whether they would select a social work career again.
* Review agency policy manual and identify policy principles that are very similar to the NASW Code of Ethics. Identify policies that appear to be in opposition to the Code of Ethics.

**Working with Communities**

* Spend time in the community and get to know where things are and what is available to community members.
* Visit other agencies and service delivery systems in the local community.
* Participate (or assume a leadership role) on a committee in the community to plan a workshop, sponsored by the agency.
* Develop a bill (in cooperation with appropriate others) for presentation to a local, state, or national lawmaking body.
* Plan, lead, and conduct a fundraising activity.
* Prepare a grant proposal for a need in the community.
* Advocate for community services, systems, and/or other community identified needs.
* Write a letter to someone who has donated something.
* Understand and practice cultural competency when working with different cultures, ethnicities, abilities, and sexual orientation in work with communities; utilize process recordings for these experiences.
* Invite local police officers to offer guidance on how to reduce risk in and around your community.
* Attend community’s governing public meetings and consider how the topics relate to the agency’s mission, goals, programs, and funding.
* Attend public meetings sponsored by the United Way or other social welfare planning groups in order to better understand how the community fits into the overall social welfare system.
* Visit agencies in other communities that provide similar services to those of your community and compare approaches and programs.
* Participate in committees or task groups that are made up of representatives of various community organizations.
* Read grant proposals and reports written by your agency to see how it claims to meet community needs.
* Locate and study community resource directories, census data, and historical materials to help deepen your understanding of a particular social problem addressed by your agency in the community.
* Identify the beliefs, values, and assumptions implicit in the perspectives of those living in the community.
* Attend a legislative or public hearing that gather public input from the community before a social policy is enacted or modified.
* Identify your personal position regarding a controversial area of social policy, such as LGBTQ rights. Attend meetings of an organization that takes an opposing position to try to understand that perspective, including the values, beliefs, knowledge, and assumptions on which it is based.
* Invite a state legislator to the community to discuss his or her experiences in regards to proposing, formulating, and passing legislation.
* Use the internet to monitor the progress of a bill before the U.S. Congress or your state legislation. For information on federal legislation relevant to social work, explore legislative page at the website of NASW.
* Explore websites of organizations that monitor social policy, such as Electronic Policy Network, Center for Law and Social Policy, Center for Budget and Policy Priorities, U.S. Department of Health and Human Services.
* Attend cultural and religious celebrations and activities that are meaningful to many of the clients or consumers served by those in the community.
* Invite respected members of various ethnic and religious groups in the community to explain how cultural and religious factors might influence clients’ perceptions of the agency’s programs and services and whether they would be inclined to use those services.
* Listen to music and read books and poetry by members of cultural or minority groups served within the community.
* Visit agencies that specifically serve members of minority groups, (i.e. refugee programs, women’s centers, LGBTQ community centers, and advocacy groups for persons with disabilities). Ask how their programs differ from yours.
* Examine assessment tools used in the agency to determine if they are culture bound or culturally inappropriate.
* Seek opportunities for cultural immersion experiences within the community.
* Attend local chapter meetings of NASW or the meetings of other social work-related professional organizations and decide what issues are of greatest concern to the social workers in the community.
* Identify situations in which there might be a conflict between what is required by the NASW Code of Ethics and the requirements of a specific State or federal law.
* Observe court proceedings, especially ones in which your agency is involved.
* Observe self-care practices of those around you and develop your own self-care plan for practice.
* Search out web sites that will expand your understanding of social work’s responsibility to maintain global standards of practice. For example, read the United Nations Universal Declaration of Human Rights.