315:

Corresponding with Other Human Service Agencies

A Training Outline

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**For the
Pennsylvania Child Welfare
Training Program**

**University of Pittsburgh
School of Social Work
Pittsburgh, PA**

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315: Corresponding with Other Human Service Agencies

An Overview of the Curriculum

Rationale:

Even in today's age of electronic communication; the fax machine, E-mail, and computers have made writing skills more important than ever. Every day, human service workers correspond with others. Knowing how to craft the written word remains a difficult job for some caseworkers, supervisors, managers, and support staff. A few basic guidelines can make that job easier, and the results more rewarding.

Learning Objectives:

- ♦ Participants will identify the importance of corresponding through written communication with other social service agencies.
- ♦ Participants will recognize the components of a well-written business letter.
- ♦ Participants will practice writing social summaries.
- ♦ Participants will practice writing business correspondence.

Competency:

315-1 The worker can identify pertinent data for inclusion in case records and reports, knows how to organize information in a clear, concise manner, and is able to record summarized case assessments, case plans, and other supporting data into the family case record and reports.

Length of Workshop:

3 hours

Materials Needed to Present this Workshop:

- Colored Markers (at least two per table)
- Masking tape
- Name tents
- Overhead projector & screen
- Easel stand and flip chart(s)
- Curriculum
- Overhead transparencies
- Handouts
- PA. Practice Standards (One copy in order to read appropriate sections)
- Writing samples that are humorous, noteworthy, or support the material. (Optional)
- Sample social summary formats and/or well-crafted business letters (Optional)
- Risk Assessment summary format (to guide any participant who may have forgotten to choose a subject to use for a social summary.)

An Overview of the Curriculum (continued)

Target Audience:

Child welfare caseworkers, supervisors, managers, and support staff

Summary:

Corresponding with Other Human Service Agencies is meant to reacquaint the child welfare professional with the basics of business correspondence. Whether it is a business letter requesting information or a social summary sent to the courts, polished writing skills are necessary to get the message across and create the right impression. This workshop reviews the thought process involved in writing, and fundamental guidelines for crafting letters and summaries.

Expectations of the Trainer:

The trainer should possess good writing skills, along with a knowledge of grammar, composition, style, and the writing process.

Agenda for a Half-Day Curriculum on Corresponding with Other Human Service Agencies

ESTIMATED TIME	CONTENT	PAGE
15 minutes	Introduction & Opening	**4**
60 minutes	Business Letters	**7**
15 minutes	BREAK	**-------**
60 minutes	Writing Social Summaries	**11**
15 minutes	Action Planning	**13**
15 minutes	Closing & Evaluation	**15**

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Introduction and Opening

Estimated Length of Time:

15 minutes

Learning Objectives:

- Participants will know the rationale, learning objectives competencies, applicable Pennsylvania practice standard(s), and agenda for this session.

- Participants will meet the trainer, other participants, and learn any “housekeeping” details.

- Participants will understand the reasons for enhancing and refreshing their writing skills

Method of Presentation:

Lecture, small and large group activity

Materials Needed:

- Name tents
- Markers
- Copy of Pennsylvania Practice Standards
- Overhead #1, Learning Objectives and Competency
- Overhead #2, Agenda
- Overhead #3, Why Do We Write? (Instructions)
- Overhead #4, Why We Write (List of Reasons)

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Introduction and Opening

Outline of Presentation:

Prepare the room by placing name tents and markers on each of the tables. At the start of the training day, the trainer covers the following:

- Welcome the participants to the session
- Introduce the trainer and cover any housekeeping details like restroom location, breaks, and telephone location.
- Present the rationale for the training
- Review the learning objectives for the session, the applicable competency, and the PA. Practice Standards dealing with writing.
- Cover the agenda for the session
- Conduct a brief What's In It For Me (WIIFM) exercise by asking why we write.

Step 1:

If the participants haven't done so already, suggest they complete their name tent listing any information they'd like to share with their table mates. (Explain that their first name is required, at a minimum!) While they do so, the trainer introduces herself or himself.

Cover the rationale, competency, and learning objectives using **Overhead #1**.

Review a few selected PA. Practice Standards related to writing and documentation and tie to the session. *(Look at the Standards table of contents or the index under Documentation.)*

Cover the agenda for the session using **Overhead #2.**

Give the participants approximately 2 minutes to introduce themselves to each other before moving to step 2.

Step 2:

Ask the small groups, "Why do we write?" Explain they are to answer the question in general, and specifically for child welfare. Post **Overhead #3**, and explain they have 3 minutes to surface as many answers as possible. (Overhead #3 will provide the rest of the details.)

After three minutes, call for the each group's attention, and ask how many reasons each table gathered. Allow the small group with the largest number to state their list first. Trainer should list reasons on a flip chart. Afterwards, have the remaining tables add any others to the list. Finally, the trainer should post **Overhead #4**, and review it to reinforce the "whys" that have been called out, as well any that were missed.

Introduction and Opening (continued)

Suggest that business letters and social summaries make up a significant portion of our work. Each time we send a letter or summary to someone, we create an impression of ourselves . . . and (possibly) send an unintended message about our ability as a child welfare professional. Explain there are some easy rules, formats, and content selections we can make to increase the impact of our letters.

TRAINER NOTES ON THIS SECTION

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Writing Business Letters

Estimated Length of Time:

60 Minutes

Learning Objectives:

- Know the general rules of business letter writing
- Know the formatting, parts, and style choices appropriate to business letter writing.
- Know the content of a good business letter
- Practice writing and proofreading a business letter

Method of Presentation:

Lecture, and small group exercise

Materials Needed:

- Handout #1, Business Letter Writing: General Rules
- Handout #2, More Persuasive Letters
- Handout #3, Parts of a Business Letter
- Handout #4, Business Letter Example Turnepp County
- Handout #5, Letter Styles and Stationery Choices
- Handout #6, Proofreading Checklist
- Overhead #5, Practice Writing A Letter (Instructions)
- Overhead #6, Proofreading Checklist

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Writing Business Letters

Outline of the Presentation:

Using the handouts and overheads, introduce this section by covering the rules of business letter-writing, followed by the guidelines for content and formatting business letters. Afterwards, have each participant construct a business letter they actually intend to write for the job, or make up one. Participants then set their letter aside while the trainer covers the proofreading and checking rules for business letters. Participants then exchange letters and review each other's work.

Step 1:

Present the *general rules of writing business letters* using the material contained in **Handout #1** as a guide for discussion. Follow that material with the *more persuasive letters* material contained in **Handout #2**. (Ask participants for any particularly effect techniques they've developed to make their correspondence more persuasive.)

Step 2:

Ask the large group to name the parts of a business letter. As they call out the parts, list them on a flip chart. Tell the group you'll cover the parts of a business letter, and see how many they managed to name. Distribute **Handout #3** and **Handout #4.** Be sure to cover where each part goes; both positioning on the paper, and relative to the other parts.

Step 3:

Cover the guidelines for *stationery choice and use* noted on **Handout #5.** Ask participants to think about their business stationery. Pose the question, "Does your office stationery measure up to the guidelines." Have them make a note of where they might need to change their current practice or tools. (They might circle those items on their handout.)

Move to the next section by explaining how to put more "personality" in business writing. Use the following 10 techniques suggested by Sam Deep and Lyle Sussman in their book, <u>Smart Moves:</u>

- **Read your letter out loud**. If it sounds stuffy or artificial, it probably is.
- **Be concise**. Don't use long wordy expressions.
- **Create a profile of your topic**. Write a one sentence response to the following: What am I writing about? What does my reader need to know in order to respond? How can I convince my reader?
- **"Send a cable" to your reader.** Pretend the reader is out of the country and force yourself to be brief but clear.
- **Try an "overseas phone call."** State the information into a tape recorder and limit yourself to three minutes or less.

Answer the 5 W's and an H for your subject. Respond to *Who, What, When, Where,* and *How,* and reorder the answers in an outline.
Brainstorm a "map" of all the central ideas. Put the statement of purpose in the center, and the main ideas on branching lines that emanate from the purpose. Get all the ideas down before attempting to organize the information.
Write the introduction after you've written the rest of the piece. The introduction is a forecast of what's to come. It's often more efficient to write the introduction after you've finished, and can see what you've written.
Write the conclusion first. You may see more clearly how to organize your points to get to that conclusion.
Don't try to write finished prose as you go. Your first goal is to get the ideas and thoughts down on paper. Get it written before you worry about getting it right! *(Ed. Note: Just remember not to leave that first writing in dictation!)*

Step 4:

Tell the participants you've provided them with all the information they need to create an interesting business letter. Tell them it's time to create a business letter they will use at their agency.

Step 5:

Instruct participants to review their handouts before drafting a business letter of their choice. Project **Overhead #5** with instructions for the exercise. Review the instructions. For those who may have forgotten to choose a topic for this segment, some of the following topics might catch their interest:

- Thank a civic organization for their donation to an agency fund for kids
- Compose a cover letter for a release of information to a hospital that is notoriously slow in sending the records.
- Respond to an adult who was adopted and now wishes to find out about her birth family.
- Respond to an irate relative who threatens to go to the press over the agency's handling of an abuse case. He's written to you demanding a copy of your case file.
- Express your concern(s) for a child on your caseload that is being referred to a new service provider. You aren't sure how much they know about abused children.

After 10 to 15 minutes, tell the participants we'll return to the letters. Instruct them to keep the letter nearby for the proof-reading portion of this segment.

Step 6:

Distribute **Handout #6, Proofreading Checklist**. Discuss the "talk points" on the handout with the participants. Remind them of the need to check the letters they composed earlier. Project **Overhead #6** with the proofreading instructions. Review the instructions. Ask the group to trade letters with a table mate, and check their partner's effort.

When finished, have the participants return the letter with their comments.

Ask the group to share any insights or observations gained as a result of their proof-reading.

This concludes Writing Business Letters

Presenter's notes on this section:

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Writing Social Summaries

Estimated Length of Time:

60 Minutes

Learning Objectives:

- Know the guidelines around preparing to write, thinking clearly and logically.
- Know some general rules on sentence structure and well-constructed paragraphs.
- Practice organizing and begin writing a social summary.

Method of Presentation:

Lecture, and individual exercise

Materials Needed:

- Handout #7, Thinking Clearly and Logically
- Handout #8, Paragraph Checklist
- (Optional: A risk assessment summary format might be worth having on hand for the participant(s) who may have forgotten to choose a topic for a summary.)

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Writing Social Summaries

Outline of the Presentation:

Trainer introduces a number of guidelines and suggestions on *preparing* to write, and *thinking* in a clear and logical manner. Trainer follows up with guidance on well-written sentences, and complete paragraphs. Afterwards, participants begin writing a social summary on a topic they brought with them.

Step 1:

Use **Handout #7** to discuss material on preparing to write, and guidance on the thinking process. Have participants mark those areas where they need to improve.

Step 2:

Cover the material on sentence structure and paragraph construction written on **Handout #8**. Tell the group this is only a brief overview of the topic. (Remind the group that this subject is covered in detail in the Basic Writing Skills course.) Be sure to stress the importance of being clear and exact in our writing.

Step 3:

Remind the group they were to think of a current case situation needing a written summary. Tell the group that it's time to begin writing the summary. **Explain how much time they have to work on the task.** *(This will depend, in part, on whether you are on time. If you are not, you can use this segment as an "accordion.")* Remind the group to use their handouts and any notes they've take to help them in their writing.

Trainer note: Have a few copies of a risk assessment format that can be used by any participant who forgot to bring a case situation. Since most workers conduct risk assessment, this format can be used to write a summary of a real or fictitious case.

At the end of the time, ask a few participants for feedback on the process they used. Ask participants what their plans are to complete the work. Suggest they add this to their action plans.

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Action Planning

Estimated Time:

15 minutes

Learning Objective(s):

- List the gaps in knowledge and skill relative to writing correspondence and social summaries.
- Construct a plan of action geared to improving the participant's correspondence and summary writing.

Method of Presentation:

Lecture and individual exercise

Materials Needed:

- Handout #9- Action Plan
- Overhead #7- Completing the Action Plan (Instructions)

Action Plan

Outline of the Presentation:

Explain that it's time to construct a plan to transfer the work they've done to the office. Post the overhead with instruction for completing the Action Plan, while reviewing the instructions for the group. Simultaneously, pass the Action Plan handout to the participants. Suggest to the group that they should consider putting this valuable planning time to good use, and develop a realistic plan they can use on the job.

Step 1:

Tell the group the time for action planning has come. Project **Overhead #7**, and review the directions listed for the group. Remind the group of the time they have to complete the task. If they understand what's to be done, pass out **Handout #9, Action Plan** to the participants.

Remind the group of the valuable time they have to devote to improving their writing skills. Suggest they make use of this "gift."

Accordion: In the event that you have time left over, you can use one of the two methods below to discuss participant's plans:

1. Go around the room asking participants to state one action step to improve their writing skills.
2. Post one or two flip chart pages, and have each participant list their first action step on the charts.

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Closing & Evaluation

Estimated Time:

15 minutes

Learning Objective(s):

- To conduct an evaluation of the training session
- To close the session

Method of Presentation:

Lecture, and individual exercise

Materials Needed:

- PA. Child Welfare Competency Based Training Evaluation Form

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Closing & Evaluation

Outline of the Presentation:

Trainer signals the close of the session by distributing the standard evaluation form for participants to rate the event. Trainer offers any last words, as well as a “thank you” to the participants for work and attention.

Step 1:

Tell participants an evaluation of the training session is needed to assist the program and the trainer in meeting their needs. While distributing the evaluation form, ask for any last comments or questions on the material. Remind participants to list on their evaluation form any related topics they would like.

Step 2:

Thank the participants for their work and attention during the session. Tell them they are free to go after turning in their completed evaluation form.

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