

# Transforming Traditional Human Services Roles

## 2

*Goal: In this unit, the different roles that social workers and other human services professionals utilize when working with clients are reviewed. These roles include but are not limited to: advocate, analyst/evaluator, broker, educator, enabler, facilitator, initiator, negotiator, case manager, clinician, administrator, and community organizer. Understanding the meaning of these functions is useful for working with clients in all areas of professional practice.*

**S**killed practitioners take on different roles and interactions with clients, depending upon a careful assessment of a client's needs and circumstances. When human services professionals use their roles to identify economic concerns as central to the issues that clients face, they can potentially transform lives by providing information and resources that clients may not be aware of.

Frequently, human services workers link clients to community resources and services, including public benefits, health and social services, legal aid, support groups and financial planning assistance. Despite the importance of becoming economically literate, social workers must stay mindful that they are not trained or equipped to provide financial advice or to assume the role of financial counselor or legal expert. In working with clients, remember to explain your role. It would be unethical to offer financial or other advice in an area outside of your professional expertise and training.

Clients may feel reluctant to reveal their ignorance about money and/or may feel embarrassed about their lack of resources. They may be ashamed that they have "gotten themselves into this mess." It is important that personal beliefs or conflicts about money matters do not intrude upon work with clients.

**A. The Advocate.** Advocacy comes into play when working with individuals and families as well as with groups and communities. Practitioners advocate on multiple levels: to foster both individual well-being and social change. The social work profession distinguishes between **these two types of advocacy: case (micro level) and cause (macro level) advocacy.**

*Case or individual/family advocacy* involves working to provide information or obtain services that clients may need to improve their economic situation. For example, clients may have language or cultural barriers that prevent them from understanding and responding to financial demands, or be too scared or overwhelmed by life circumstances and/or financial issues to confront institutions and systems. With the client's permission, the (social) worker may try to locate a banker or lawyer to speak directly to the client and engage him/her in decisionmaking. Advocating for individuals is strengthened when the worker engages the clients in developing and reviewing the advocacy plans. It is important for workers and clients to construct interdependent relationships that empower clients to develop the skills to advocate for themselves if possible.

In the area of economic security, the more familiar *cause or social change advocacy* includes supporting or working actively for social change by seeking job creation, fair wages, safe and healthy working conditions, adequate public benefits, and regulated banking practices. This can include conducting lobbying efforts to change local, state and/or federal government regulations or policies.

**B. The Analyst/Evaluator.** As analyst or evaluator, practitioners work on multiple levels to help clients make informed choices. The process can include helping clients to reframe pressing problems and concerns by identifying component parts rather than viewing them all together which can be overwhelming. The analyst/evaluator helps clients to prioritize issues, assess plans and ideas, and evaluate the success of an intervention.

On a practical level, this may involve helping clients to develop a realistic budget based upon actual resources and expenditures, or to evaluate the cost and benefits of an economic opportunity. For example, a client may want to take a job that involves two hours of travel each way. The social worker as analyst/evaluator might work with the client to evaluate the cost effectiveness of this choice by looking at any additional childcare or transportation costs, as well as the time taken away from other responsibilities or opportunities. Economists describe this as evaluating opportunity costs. Workers involved in research and program evaluation also work as analysts and evaluators.

**C. The Broker.** As brokers, social service workers link clients to relevant community resources and make referrals to services such as public benefits, healthcare and social services, legal aid, support groups, or financial planners. In this role, workers may also serve as advocates or negotiators by following up on behalf of the client.

Some clients may experience ambivalence or shame about accessing public resources and benefits. If these feelings arise, the worker may well add the role of enabler to that of broker by working with clients to identify their strengths or that of an educator who helps clients understand what will occur when they meet the financial professional or other service providers.

**D. The Educator.** In general as educators, (social) workers seek to inform ourselves about potential interventions and existing resources prior to making recommendations. This knowledge positions the worker to make appropriate referrals to agencies that specialize in and are competent to help clients meet their economic needs or resolve economic problems.

This may include opportunities related to the development of financial resources, such as information on jobs and employment training programs, resume building skills, accessing transportation, as well as information about bankruptcy, debt reduction, mortgages, investing, and free or low cost tax preparation. The educator then uses this information to educate clients so that they can make meaningful decisions among the available options.

**E. The Enabler.** As an enabler, a (social) worker may help clients cope with, or reduce stress related to financial pressures or struggles. Enabler skills include helping the client recognize the financial sources of problems, reducing resistance and ambivalence around dealing with economic issues, recognizing and managing feelings aroused by economic difficulties, identifying strengths and assets (personal, social and economic), mobilizing support systems, and learning how to break down problems into manageable parts. The enabler also helps clients to focus on goals and conveys hope.<sup>1</sup>

**F. The Facilitator.** As facilitator, the worker often takes the lead or mediating role in a group situation such as a family therapy session. In facilitating communication related to financial concerns, workers need to be aware that family members may be very angry or blame each other for economic difficulties.

**G. The Initiator.** As initiator, the worker helps identify needs and may call attention to an issue that could be problematic, and suggest a concrete plan with follow up steps.<sup>2</sup> For example, when working with a couple, if one partner defines spend

ing patterns as a problem, but the other partner does not, a discrepancy exists. By drawing attention to the discrepancy, the worker initiates an exploration of the issue and creates an opportunity to problem-solve, perhaps serving as a catalyst for preventative action or positive change related to a family's economic well-being.

**H. The Mediator.** As mediator, the practitioner seeks to resolve disputes and conflicts among various individuals or client systems while remaining neutral. Families and couples often disagree about financial matters. By remaining neutral and helping parties to explore their concerns, workers can help the parties to recognize patterns and dynamics that they might not be aware of. Areas of concern or disagreement that can benefit from mediation include when a couple disagrees about financial expenditures, such as buying or leasing a car, going on an expensive vacation, how to budget for child-care or household costs, and whether or not the family should financially contribute to care for an aging parent.

**I. The Case Manager.** Serving as a case manager is an important role to employ when working with clients who lack the skills, knowledge, or resources to negotiate systems on their own. Clients who lack the skills and ability to manage finances on their own may need a case manager to ensure that their basic needs are met. This could involve coordinating appointments for the client, interfacing with the key individuals or agencies, such as the client's landlord, local social security office, or bank. Workers performing the role of case manager act as a negotiator between clients and service delivery systems.

## For Discussion:

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1. Individually or in groups, compile a list of areas in which human services workers may advocate for clients in the area of economic literacy.
2. Which of the roles would you most likely use at the micro or direct-practice level? What about the mezzo or at the level of small groups and families? Which roles are suited for community organizing or macro practice?
3. Revisit Unit One Case Example (Julia M., the 25-year-old woman, who was hospitalized after an overdose.) What role(s) would you be most likely use to assist her?

## NOTES

### UNIT TWO

1. Zastrow, Charles & Karen K. Kirst-Ashman (2007). Understanding Human Behavior and the Social Environment (7th ed.) Belmont, CA: Brooks/Cole — Thomson Learning Inc.
2. Zastrow, Charles & Karen K. Kirst-Ashman (2007). Understanding Human Behavior and the Social Environment (7th ed.) Belmont, CA: Brooks/Cole — Thomson Learning Inc.