



# The Hartford Partnership Program For Aging Education

A Guide to Infusing a Rotational Field Education Model on Aging into Your MSW Program  
[www.Gero-EdCenter.org](http://www.Gero-EdCenter.org)

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## INTRODUCTION



## About The Hartford Partnership Program for Aging Education

The Hartford Partnership Program for Aging Education (HPPAE) was developed and implemented by the Social Work Leadership Institute and is now administered by the Council on Social Work Education (CSWE). The goal of the HPPAE is to increase the number of social workers who specialize in aging. With support from the John A. Hartford Foundation, the HPPAE is a different approach to geriatric field education, driven by partnerships between universities and community agencies and a dynamic curriculum with a rotational field education model that exposes students to the full spectrum of aging.

The HPPAE is part of the Geriatric Social Work Initiative, a national collaboration supported by the John A. Hartford Foundation among social work education programs to equip social workers with knowledge, skills, and competencies to improve the care and well-being of older adults and their families.

Today, the program is active in more than five dozen social work schools across the country. Student recruitment is up—and more social workers are embarking on careers in aging care. We hope this manual will inspire you to be leaders in the movement to grow this critical workforce, because the country needs more social workers in aging.

## About This Guide

The purpose of this guide is to introduce you to the HPPAE model and provide you with the framework and tools to implement the model within your own Master of Social Work (MSW) program.

Every school or department of social work is a unique program, influenced by its students, faculty, location, and community needs. Currently, HPPAEs exist at both private and public institutions and in rural and urban settings, with varying student populations. While the HPPAE is founded on six essential components, it is designed to be flexible and adapt to each school's or agency's unique needs and characteristics. This guide is meant to share best practices as a guide for you to establish a HPPAE that fits your social work program or agency.

In this guide you will find:

- An explanation of why the HPPAE is an effective approach for teaching geriatric field education and recruiting students to the profession
- A description of the HPPAE, including its six essential components
- Guidelines for how to design and implement a HPPAE at your school or in your agency
- Guidelines for evaluating your HPPAE and why it is important to do so
- Guidelines for how to sustain your HPPAE
- Guidelines for marketing and outreach to stakeholders who will be essential to your HPPAE's success

## Acknowledgments

The creation and implementation of the Hartford Partnership Program for Aging Education have been a collaborative effort. We would especially like to thank the John A. Hartford Foundation and its former executive director and treasurer, Corinne Rieder, senior program officer, Nora OBrien-Suric, and James O'Sullivan, former program officer, as well as Laura Robbins from Laura A. Robbins Consulting, LLC for their unwavering support. We are indebted to the deans, directors, faculty, and staff at the schools and departments of social work who dared to be the first to bring this model to their schools. We are also indebted to the New York Academy of Medicine for its support and the staff at the Social Work Leadership Institute under the leadership of Patricia Volland and Jeannine Melly.

And finally, we are grateful to the students, without whom there would be no program, and with whom we have the opportunity to make a positive impact on the future.



## SECTION 1

The Hartford  
Partnership Program  
For Aging Education:  
An Overview

## Creating a Pipeline for a Trained and Qualified Workforce

The Hartford Partnership Program for Aging Education (HPPAE) is an effort to strengthen and increase the availability of providers for our nation's aging population by infusing MSW programs with an innovative educational model that has been shown to recruit and train social workers successfully in the field of aging. As part of this effort, we are working to expand the perception of the geriatric social work field by immersing students in a variety of care and service settings so they have firsthand experience with a range of diverse older adults, including those who are active and living independently.

### A Brief History of the Program

The HPPAE is part of the John A. Hartford Foundation's Geriatric Social Work Initiative. For more information about the initiative, visit the John A. Hartford Foundation's website at [www.jhartfound.org](http://www.jhartfound.org).

The HPPAE began in 1999 with 11 demonstration sites across the country. Most of the schools that received start-up grants from the John A. Hartford Foundation continued to operate long after the initial support expired, testament to the enthusiasm and support that the HPPAE has earned from administrators, faculty, community leaders, and students alike. An outreach initiative was launched during the same period to encourage additional programs to implement HPPAE without grant support.

A partnership with the Veterans Health Administration (VHA) was launched in 2012 to expand the initiative and train social work students to provide care for an increasing older veteran population. The HPPAE has been implemented in select VHA Geriatric Research Education and Clinical Centers (GRECC) sites and non-GRECC sites.

## Program Overview

### HPPAE Goals

The HPPAE was founded on the belief that the most effective way to train qualified social workers to meet the demands of America's aging population is to build strong partnerships between academia and the community agencies that serve older adults. These university-community partnerships ensure that social work education is more inclusive of and responsive to the evolving needs of older adults who are transforming our traditional notions of long-term care.

The primary goals of the HPPAE model are:

- Train and prepare the next generation of geriatric social workers to meet the growing and evolving demands of America's older population.
- Increase interest in aging as a field of practice among students.
- Increase the ranks of well-qualified geriatric social workers.

The HPPAE does not require "reinventing the wheel." All accredited social work programs incorporate a field education model. The HPPAE is often an innovative improvement upon this model, taking into account the trends and changes in the field of aging that require social workers to be more familiar with, and skilled at, navigating the different health-care and social-service systems available to older adults. In the following sections, we will go into more detail about the key components that make up the HPPAE model.

# SECTION I

## The Hartford Partnership Program For Aging Education: An Overview



# SECTION 1

## The Hartford Partnership Program For Aging Education: An Overview

### When to Engage Students in the HPPAE

#### First-Year MSW Students

A strong case has been made to include first-year students, depending on the goals and needs of the host site. Twenty-five percent of existing HPPAEs enroll first-year MSW students directly into their HPPAE program, which means students are rotating through their agency placements at the same time they are undertaking general social work coursework, including some on aging.

#### Second-Year MSW Students

The HPPAE demonstration sites have found the HPPAE is most effective for second-year students who have elected to specialize in aging. Second-year students enter their field rotations having spent their first year in both general and gerontological social work curricula.

#### Two-year MSW Model

As students become more aware of demographic changes and the need for highly trained geriatric social workers, there is increased demand for two-year model with students doing both foundation and advanced placement in the HPPAE program.

#### Bachelors of Social Work (BSW) Students

Many HPPAE sites recruit students enrolled in BSW programs, often using HPPAE graduates as their ambassadors. Some HPPAE students chose to apply to a school solely because they have the HPPAE model in place.

#### Undergraduate Seniors

One of the HPPAE demonstration sites incorporated undergraduate seniors majoring in disciplines other than social work into their program. These seniors attended the same HPPAE seminars as first-year MSW students. This proved to be an effective recruitment tool for the MSW program and for the HPPAE model in particular.





## SECTION 2

Designing and  
Implementing  
Your HPPAE

## The Six Essential Components

In this section we provide a brief description of each of the essential components that make up the HPPAE and reasons that they are educationally effective for recruiting, training, and retaining students in the field of aging. In the following chapters, we will go into more detail about how each component is implemented.

The HPPAE Essential Components are:

1. University-Community Partnerships
2. Competency-Based Education
3. Field Rotations
4. Expanded Role of Field Instructors
5. Targeted Student Recruitment
6. Leadership

### Essential Component 1: University-Community Partnerships

#### General Description

The university-community partnership is the collaboration between a graduate social work education program and community health and social service agencies that serve older adults and their families. While all field education programs in social work forge relationships with agencies, field instructors participating in the HPPAE have an enhanced role in the education of the participating students.

HPPAE university-community partnerships are intentionally constructed to be more collaborative in nature, allowing field instructors to play a role in any of the following components of the program:

- Designing the HPPAE field education program for students specializing in aging
- Recruiting students to the HPPAE
- Overseeing implementation of the HPPAE in their agencies
- Evaluating the program's effectiveness and revising it as needed
- Recommending resources to keep the program running

#### Benefits of a University-Community Partnership

The synergy created by the partnerships results in significant gains for all the stakeholders, including students and older adults. Among the benefits:

- Students graduate with a more realistic grounding in real-world settings
- Older adults and caregivers receive quality care adapted to their needs
- Faculty gain a richer understanding of current service delivery systems, resources, and needs that they can integrate into their curricula
- Agency practitioners learn and update their knowledge of aging and of assessment and intervention skills
- Employers gain more prepared and competent social workers when they hire HPPAE graduates
- Agencies engage and collaborate more with other agencies as educational partners
- The partnership can help identify service and knowledge gaps, which may lead to strengthening services and/or commissioning or conducting research

Graduate field education programs are guided by a set of social work identified competencies. The HPPAE's field-based competencies in aging build upon this foundation by deepening students' expertise and experience in geriatric care. The geriatric social work competencies are also used to guide and evaluate both the program and student learning, including the selection of agencies as field sites and the learning assignments in those sites.

## Essential Component 2: Competency-Based Education

### Generation Description

The HPPAE model is grounded in a series of geriatric social work competencies developed by social work and aging experts nationally and field-tested at demonstration sites. These competencies are fully aligned with the CSWE Educational Policy and Accreditation Standards.

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### Benefits of Geriatric Social Work Competencies

An important characteristic of these competencies is that they address practice at both micro (direct service) and macro (policy, research, and advocacy) levels. Most MSW students focus on only one of these areas of practice. Social workers who demonstrate leadership in aging, however, need to be proficient in both areas, due to the complex and fractured nature of aging-care services and resources.

- Geriatric social workers who provide direct service must become proficient in identifying service gaps, assessing community needs, and developing programs to help older adults and their caregivers cope with aging.
- Macro practitioners cannot be effective in their work without firsthand knowledge of the challenges that older adults face, as well as this population's considerable assets.
- The HPPAE challenges students to think about systems at both levels. It also encourages them to come up with ways to improve services across multiple settings.

The geriatric social work competencies fall into four general categories. For a full description of each competency, visit the CSWE Gero-Ed Center's website at [www.gero-edcenter.org](http://www.gero-edcenter.org).

1. **Values, Ethics, and Theoretical Perspectives.**  
Teaches students how to assess values and biases regarding aging and address the cultural, spiritual, and ethnic values of clients, as well as the ethical principles involved in making decisions, including end-of-life issues.
2. **Assessment.**  
Prepares students to develop interviewing skills and conduct geriatric assessments of older adults' needs, strengths, and limitations, including their cognitive, physical, and social functioning. Students also learn to assess the needs and stress level of caregivers.
3. **Intervention.**  
Develops competency in establishing rapport and effective working relationships with older adults and family members, from helping caregivers reduce their stress level to educating families about wellness issues and disease management.
4. **Aging Services, Programs, and Policies.**  
Covers outreach to older adults and their families to ensure the appropriate use of services, including budgeting, evaluating service effectiveness, and advocating and organizing with service providers, community groups, and others on behalf of older adult needs and issues.



## Implementation Guidelines

### The Elements of the Competency-Based Approach

In a HPPAE, the geriatric social work competencies described above are integrated into a competency-driven approach to geriatric social work education.

This approach, developed and refined by a working group of national experts in aging and social work, requires the following five elements:

1. Adopt competencies for geriatric social work education
2. Identify individual student learning goals
3. Select field sites, rotations, and assignments
4. Integrate class and fieldwork learning
5. Assess student skill level and progress

Below are guidelines for implementing these five elements:

#### 1. Adopt competencies for geriatric social work education.

One of the university-community partnership's first tasks is to review, agree upon, and implement the geriatric social work competencies. To be truly effective, this commitment should be shared by all faculty, field instructors, and student advisors in aging, including those who may not participate formally in the partnership.

#### 2. Identify individual student learning goals.

Using the competencies as guidelines, students must work with field educators to identify and tailor their learning goals, which are drawn up as a formal Learning Agreement. These goals provide the basis for:

- Structuring learning assignments
- Selecting agency placements
- Facilitating assessment of student progress

Field instructors, field directors, faculty advisors, and field liaisons should all use the same set of competencies to provide students with a comprehensive, integrated educational experience.

#### 3. Select field sites, rotations, and assignments.

Identify and engage field sites that can provide students with practicum experience to develop expertise and leadership in geriatric social work. Field site rotations should develop core competencies, including:

- Expertise in aging care—the knowledge and skills that are specific to the older adult demographic across the spectrum of aging
- Skills in comprehensive geriatric assessment using standardized assessment instruments
- Experience working with older adults of diverse backgrounds, including different levels of independence, need, and ability

#### 4. Integrate class and fieldwork learning.

Using the same set of competencies across both classroom and field learning is essential to an effective HPPAE educational program. To ensure that there is class and field integration, we recommend the following steps:

- a. Identify course content that relates to competencies. Review syllabi of aging courses against a list of the competencies. Also, talk to faculty and students about how much aging content is discussed in class.

- b. Identify areas in which the course content is adequate and areas that require improvement. A number of strategies can help integrate competencies into classroom instruction:
- Meet with faculty to discuss ways to include more content
  - Survey faculty to determine what they might need to strengthen the curriculum
  - Develop teaching modules and distribute to faculty
  - Develop educational resources and distribute
  - Develop and advertise a speaker's bureau in aging
- c. Create seminars to link competencies with classroom and field learning. Seminars are a common vehicle in field education; they integrate classroom learning with field learning. The seminars are designed to:
- Offer enrichment opportunities with a focus on didactic presentation of aging topics that might not be covered in the classroom or by field instructors
  - Foster critical thinking about the relationship between theoretical learning in the classroom and practice learning experiences in the field
  - Engage with community partners or other experts in the field so that students have the opportunity to learn about different agencies, their clientele, and services
  - Involve field instructors and agency staff, whenever possible, thus fostering partnership between the sites as well
  - Encourage a shared sense of professional identity among students through contact with other professionals in the field

### Guidelines for Designing Seminars

Field seminars can be modified to include HPPAE seminars. Below are best practices from HPPAE seminars that were well-received by both students and field instructors:

- **Balance the format.**  
Strike a working balance between didactic and interactive. Be attuned to the preferences of each cohort of students.
  - **Avoid overlap content with other classes.**  
This will require some advance coordination with faculty and perhaps more creativity in identifying topics for seminars that are both highly relevant to practice and not already covered in courses.
  - **Be sensitive to busy schedules.**  
Poll instructors for the timing interval that works best for them and their students. Schedule seminars and other meetings at times that do not overburden the field instructors.
  - **Location matters.**  
Seminars can be held at agencies within the partnership to give students the opportunity to learn about different services, populations, and practitioners, or at the school. Geographic challenges, should be taken into account. For example, traffic in heavily populated areas or remote rural areas may discourage participation.
5. **Assess student skill level and progress.**  
The last element of geriatric competency-based field education is assessing students' progress in meeting their learning goals and the skills necessary to work with older adults. Evaluating students before beginning their internship and upon completion will be useful.

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### Designing and Implementing Your HPPAE

Students can use the Geriatric Social Work Skill Competency Scale II to rate themselves on each program competency on a 0-4 scale (0=not skilled, 4=expert skill). We have found that the scale did not produce what is known as a “ceiling effect.” That is, students did not rate themselves at the top before or after their internship, yet the scores showed that the students made considerable progress.

Educators and field instructors can use the scale to assess students’ skill levels, as well as to:

- Assess the strengths and challenges in your education program. You can enhance your seminar planning and address curriculum changes with base knowledge of where your students’ skills are strong and where they need improvement.
- Help students plan their learning experiences. For example, after students took a pretest in certain initial sites, field instructors discussed the results with them and planned their learning experiences according to areas where they demonstrated need to improve their skills.

### Essential Component 3: Field Rotations

#### General Description

Rotations, or placing students in more than one agency setting, have been used to a limited degree in social work agencies (primarily large hospitals), and have been used extensively and successfully in other disciplines. The traditional model of field education assigns students to one agency and one supervisor over the course of a year, which typically results in their working with one specific population of older adults. By contrast, the HPPAE rotational model exposes students to two or more field settings during the yearlong internship period, giving students a more comprehensive and dynamic view of the field.

The rotational model for students in aging can be implemented in many different ways, but there are some “musts.” Each rotation model must be:

- Consistent with an MSW program’s educational philosophy and objectives
- Structurally viable for the characteristics of the social work educational program and agencies in the community aging network
- Responsive to students’ learning needs

#### Benefits of a Rotational Model

There are several reasons why the HPPAE rotational model enhances student education. Students gain:

- **Exposure to the diversity of older adult clients.** They learn that there is no “typical older person” because older people differ in mental and physical health status, activity and functioning levels, educational levels, economic status, ethnicity, social support networks, and personal care needs. This helps students address cultural stereotypes and gives them a richer sense of the many ways that social workers can work with older adults, from organizing health promotion to providing grief counseling at end of life.
- **Improved mastery of today’s complex health-care and social-service systems.** By working across multiple settings, students gain a more sophisticated understanding of how the health-care system works. That is, how services and care are provided and connected via a complex service network, each with its own funding sources and definitions of eligibility criteria, benefits, and administrative structures.



## SECTION 2

### Designing and Implementing Your HPPAE

- **Greater understanding of and exposure to roles of multiple service providers.**  
Two trends, the increasing specialization of the medical field and the longevity of older adults, require geriatric social workers to understand the roles of each profession—nurses, doctors, rehabilitation therapists, psychologists, lawyers and others—as members of an interprofessional team. Students also work with multiple field supervisors and instructors, exposing them to different leadership and supervisory skills.
- **An informed perspective on policy reform.**  
Strains on the aging-care system, from the workforce shortage to access and cost challenges, require policy reform on many levels. Students who have worked across different settings are more likely to have a richer analysis of reforms that are needed, and of the systems involved, equipping them to play leadership roles in policy debates and initiatives.

#### Implementation Guidelines

##### Internal vs. External Rotation

There are two types of potential student rotations in the HPPAE:

- **Internal Rotation**, in which students stay in one agency and rotate to various practice units, programs, or services within that agency. An example would be a hospital or a placement at the Department of Veterans Affairs (VA) that offers multiple programs or services to different aging populations through separate units. This is done either concurrently or sequentially.
- **External Rotation**, in which students are placed in two (or more) separate, distinct agencies, either concurrently or sequentially for the academic year.

#### The “Hub Site” and “Block” Approach

Many HPPAEs that use either internal or external rotations have also adopted one of two approaches to implementing those models:

##### “Hub” Approach

This approach is defined by the idea that students have a permanent “home base” agency where they are placed for the duration of the school year. They are assigned a primary field instructor at their “hub” agency and complete their rotation or rotations concurrently—either internally or externally.

- **Hub External Rotation:**  
While maintaining a home agency, students rotate to a different agency for a few hours a week or a day or two per week. The task supervisors at these sites do not necessarily need to be MSWs, thus allowing for an even wider array of possible agency partners.
- **Hub Internal Rotation:**  
Students may be assigned to a VA hospital’s psychiatry department as their “home base,” then rotate to the VA’s rehabilitation department and/or primary care department where they work with task supervisors.

##### “Block” Approach

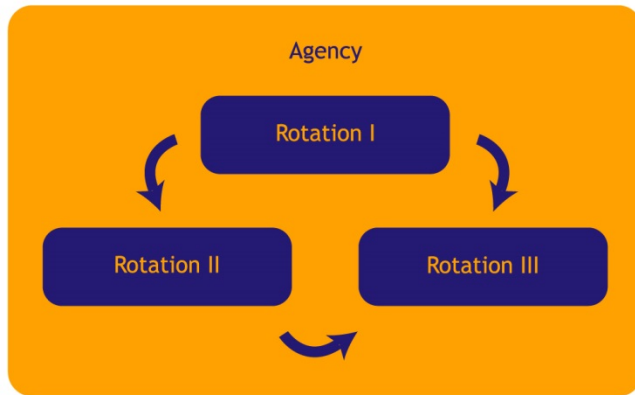
Under this approach, students are placed in different settings on a consecutive basis for discreet blocks of time, whether the settings are at different agencies (external rotations) or in different departments within the same agency (internal rotation).

- **Block Internal Rotation:**  
A student assigned to a VA hospital may spend 10 weeks at the hospital’s psych department, 10 weeks at the rehab department, and 10 weeks in primary care.
- **Block External Rotation:**  
A student may spend 10 weeks at a VA Hospital, 10 weeks at the Alzheimer’s Association, and 10 weeks at a state Department on Aging.

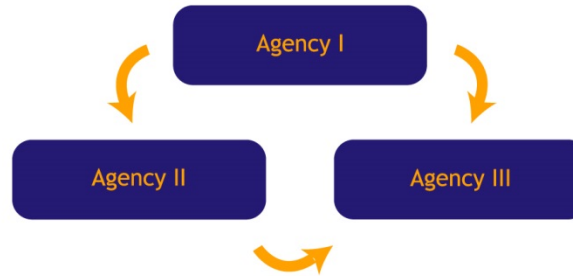
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Block Internal Approach



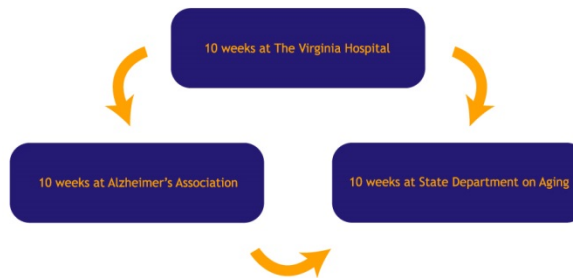
Block External Approach



Block Internal Example



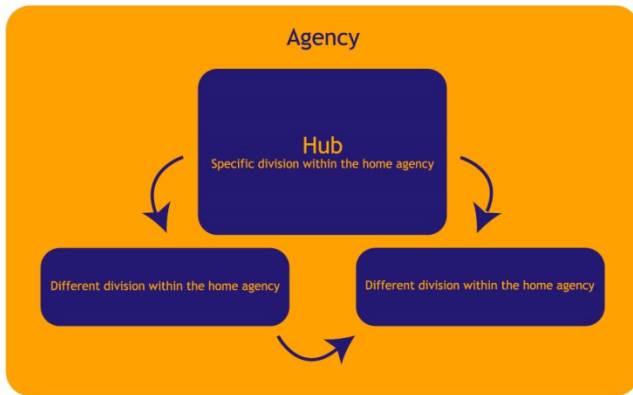
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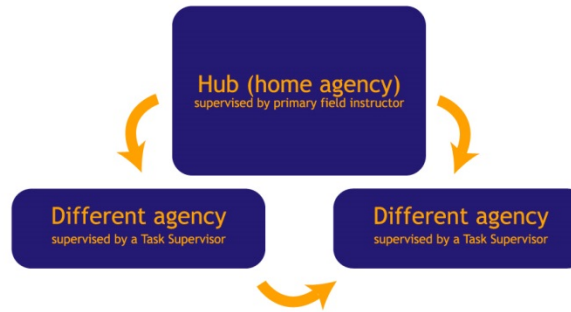
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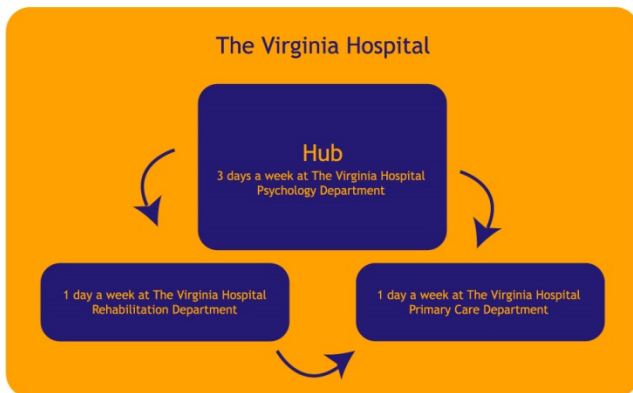
Hub Internal Approach



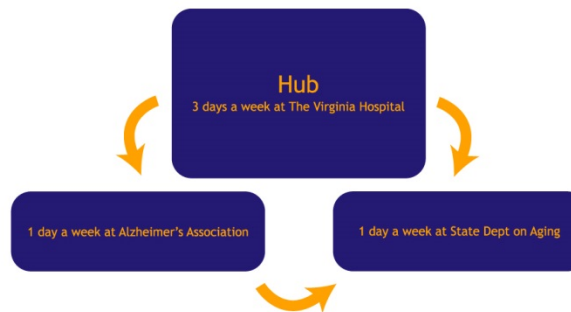
Hub External Approach



Hub Internal Example



Hub External Example





## SECTION 2

### Designing and Implementing Your HPPAE

#### Rotation Planning: Who's Responsible?

The person assigned to manage student internships, including planning rotations, varies from program to program. The point person can be the field director, a faculty member, or a field instructor at a community agency. This person must:

- Understand the rotational model
- Be knowledgeable about the competencies
- Be aware of the options for agency rotations
- Assess student knowledge and skill levels

#### Rotation Design: What Works?

The HPPAE model represents a departure from the traditional social work education placement model. HPPAE's "rotation" approach can be a particularly challenging component to implement. A common concern regarding the rotational model is its impact on continuity of client care and the development of clinical skills necessary for licensing and employment.

Existing programs have met the challenge in varied ways, including:

- Spreading the HPPAE over two years, with rotations over both years or a series of rotations in the first year and a single placement in the second
- Instituting a series of sequential rotations (7-12 weeks each)
- Implementing rotations within a large, multifaceted agency (e.g., VA, hospital) that offers a range of services and learning opportunities
- Creating a "hub" model, whereby students get more extensive experience at one or two "primary" sites and more limited exposure at other "secondary" sites

#### Four Steps to a Successful Rotation

To implement the HPPAE rotational model successfully, follow these four important steps:

##### 1. Educate faculty, staff, and partnership members

Every member of the partnership and its affiliates should understand the concepts and rationale for the HPPAE rotational model. Below are strategies for reaching out to two of the core constituents.

##### Outreach to Faculty

It is important to educate and engage academic and field faculty who are not directly involved in your HPPAE because:

- They play an advisory role in planning students' learning goals and experiences.
- They will be better prepared to lead classroom discussions when students talk about experiences from the field.

You can inform and engage faculty in individual meetings or group sessions where they have an opportunity to discuss their concerns, issues, and roles. Content for these forums should include:

- A rationale for using the rotational model with students in aging
- A clear relationship of the model to current practice realities
- An explanation of the range of services in the service sector
- Examples of how to plan rotations with students using the competencies
- An explanation of the relationship between the field rotations and classroom learning

### Outreach to Community Agencies

It is also essential to educate community agencies that serve older adults about the benefits of the HPPAE. This is the first step to recruiting them to be part of the program in their community. These agencies may already be field sites of your school, or they may be agencies your school has not historically engaged.

Your outreach should:

- Anticipate that many agencies may initially shy away from the model because of their perception that the HPPAE involves extra work—that the rotations will translate to insufficient time to work with interns or that client care will suffer
- Make the case that by being a part of the HPPAE, they are playing an important role in recruiting and training the future workforce, giving students a bigger picture and more sophisticated outlook of the health-care system, and getting direct exposure to a larger and better trained pool of potential future employees

### 2. Select agencies to be field sites

Keep these guidelines in mind as you select your field sites:

- The agencies in your university-community partnership will likely serve as field sites for student rotations, but field selection need not be limited to them. Additional sites could be:
  - Organizations outside the traditional aging network that reach specific communities or populations, such as ethnic groups
  - Advocacy or policy agencies that have not previously participated in educational ventures
- A site that agrees to be part of the partnership and help implement the HPPAE may not have a placement each and every semester or quarter for students, but may wish to remain actively involved in the partnership.

- A site that wishes to have students placed with them may not take on an active role within the partnership.
- Agencies without MSW-qualified field instructors may also serve as field sites, because they reflect certain workforce settings that may employ social workers who report to non-social workers. In cases like these, however, an off-site qualified social work professional from the same or another partnership agency would need to serve as the field instructor.

#### Criteria for Selecting Agencies for HPPAE Rotations:

Select a wide range of agencies across the aging-care continuum to provide students with good learning opportunities and to ensure adequate representation of the service sector.

The ideal HPPAE agencies fulfill the following:

- Provide services to older adults
- Have an interest in helping to educate social workers
- Have experience educating students—you may select agencies that do not have this history, but anticipate that they will need extra support
- Understand rotations and are willing to participate fully, through work with other agencies and the MSW program
- Employ support staff that is interested in educating students by enlisting them in being field instructors, task supervisors, or preceptors

### 3. Individualize rotations based on students' learning goals

Learning goals and rotation plans must be tailored to the individual student because not all students have the same background, level of education, or experience in aging. Some students may have worked in a nursing home or in adult protective services prior to returning to school; others may have provided home care to their parents or majored in gerontology in an undergraduate program. Field learning needs to strengthen and supplement knowledge and skills, not duplicate them, and connect back to the competencies.

A planning discussion should include:

- A review of competencies
- An assessment of student objectives and experience in relation to the competencies
- A review of agencies available as field sites

Tools that are useful in talking to students about field rotations include:

- The Geriatric Social Work Competencies
- The Older Adult Service Matrix
- A list of agencies available for rotations

#### Designing a Rotational Model: Essential Questions

As you design a rotational model for your HPPAE and for each individual student, use the following questions as guideposts:

- a. What configuration of field placements facilitates the development of all necessary knowledge and skills?
  - Which competencies can be gained at each potential placement site?
  - How long and how often should a student be at a site to gain specific competencies, while meeting the expectations of the agencies?
  - What number of rotations is feasible? What number is optimal? Should rotations be implemented over one or two years?
  - Is there sufficient staff time and support to organize and oversee a particular rotational model?
- b. Should the rotations be sequential, concurrent, or a combination of both?
  - How should the combination of rotations be structured?
  - Should combinations be fixed or individualized?
  - Should there be stratification of rotations (e.g., a primary and a secondary, a primary and multiple secondary sites)?
- c. Which mechanisms need to be established to ensure appropriate communication and supervision?
  - Are there appropriate and sufficient communication mechanisms between rotation sites?
  - Are there appropriate and sufficient communication mechanisms between the school and the sites, regarding student supervision, curriculum content, and other issues?

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- How are students supervised at each of their rotations? Are staff members qualified to serve as field instructors? Is there a need for task supervisors in addition to field instructors?

Input from agency and field placement staff is essential to the design of the rotational model. Once implementation is underway, mechanisms for feedback— including feedback from students — must be established.

#### Rotations in Rural Settings: Factors to Consider

Rural settings present unique challenges to the rotational model:

- The low population density requires that social workers and services provide for the full spectrum of aging, from high functioning and active to end-of-life
- Few agencies are likely to have a specific aging focus
- Students in rural areas must have generalized knowledge and skills to meet the needs of potential employers
- With fewer agencies overall, there are likely to be fewer agencies employing staff with appropriate credentials to serve as field instructors to social work students
- Travel to school and multiple agencies may place a practical and financial burden on students

Despite these challenges, highly successful HPPAEs have been developed in rural areas. Strategies include:

- Primary placement at a large or primary umbrella organization (e.g., an Area Agency on Aging) through which rotations can be organized—possibly by agency staff
- Primary placement at a site with a staff person qualified and willing to serve as field instructor while the student is on site and while on rotation; at the secondary site, a “task supervisor” oversees the student’s work

- Scheduling classes on consecutive days, so that students can spend the remaining days in the vicinity of their practicum

#### Setting Learning Expectations

Expanding the number of practicum sites results in reduced time spent at each site. Consequently, HPPAE students may be unable to fulfill each of the job functions that would be expected of social work students in a traditional practicum. Satisfaction with the rotational model, therefore, necessitates a change in expectations. Satisfaction is likely to be greater where:

- Agencies, students, and schools see the practicum as a rich, competency- and skill-based learning opportunity, rather than a means for students to learn to perform a particular job
- Academic preparation and administrative requirements are responsive to reductions in the practicum duration (e.g., fingerprinting and TB testing is done by the university in advance of the placements)

#### 4. Orient students to agency before placement begins

It is helpful for students to know the basics of how rotations work before their first day of fieldwork. Prior to starting any internship, students should receive a program orientation that includes information about:

- How this model differs from the traditional model but remains focused on building practice skills
- How best to take advantage of the diverse learning experiences
- Who to talk to about concerns and problems
- How seminars and other program elements relate to rotations
- Other students in rotations



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Several HPPAEs have students participate in a summer internship, class, or seminar that orients them either to their primary agency placement before actually starting the formal internship or to the HPPAE as a whole. Other programs have involved the students in creating their rotations—either by choosing among already established groupings or by creating a new site through their own initiative.

#### Essential Component 4: Expanded Role of Field Instructors

##### General Description

The field instructor traditionally plays an important role in educating social workers. In the HPPAE, that role is even more essential because students are rotating through multiple settings, which increases the potential for learning to become disjointed. This is why HPPAE field instructors have expanded responsibilities beyond those traditionally associated with their profession. The traditional responsibilities are:

- Orient students to the agency
- Develop learning contracts with students
- Develop, coordinate, and supervise assignments
- Create a plan to evaluate students' performance and collect feedback
- Mentor and model for geriatric social work practice
- Facilitate students' professional growth

Additional HPPAE responsibilities may include:

- Direct and coordinate student learning across programs and agencies
- Participate in the university-agency partnership activities
- Participate in HPPAE integrative seminars as leaders, expert commentators on case situations, and instructors
- Consult on education and training in field agencies  
HPPAE field instructors may also be asked to:
- Teach in the classroom as guest speakers on special topics in aging in foundation courses or aging-specific courses
- Serve as adjunct instructors for aging courses
- Give lectures or talks at brown-bag lunches to educate and interest students in topics on aging

##### Benefits of the Field Instructor's Expanded Role

In the HPPAE model, field instructors make important contributions to the educational program beyond working directly with students in the field. Field instructors can:

- Bring their years of experience and knowledge of practice realities and service-system issues, as well as program planning and management skills
- Help recruit students by being role models and living proof that working with older adults is rewarding
- Encourage agency staff with undergraduate degrees to apply to the MSW program, thereby upgrading the level of skill in agencies

## Implementation Guidelines

The field instructor oversees the continuity of the student's internship and learning by fulfilling these tasks:

- Plan student rotations, focusing on learning goals in relation to competencies; primary field instructors (along with field directors, liaisons, and advisors) help students identify and achieve these goals and oversee related assignments in these settings, which may include a program or agency other than the one in which they are employed
- Direct and coordinate the students' experience; in the HPPAE model, field instruction is a team effort that is led by primary field instructors charged with keeping communication open between practitioner-educators, faculty, students, and other members of the HPPAE
- Orient students to rotations and other facets of the HPPAE
- Help students understand the relationship between their rotation agencies and service providers with the aid of the Older Adult Service Matrix
- Set parameters and expectations for student learning experiences based on program goals or best practices in geriatric social work
- Be involved in discussions around curriculum and seminars, and participate in seminars organized by faculty and/or field directors that integrate classroom and field learning
- Track and assess student progress using the Geriatric Social Work Skill Competency Scale II

- Oversee additional practitioners ("task instructors" or "task supervisors") who are essential to ensuring that students have real-world practice opportunities in diverse settings. In their settings, these additional practitioners or instructors can:
  - Participate in development of learning contracts
  - Orient students
  - Plan assignments
  - Supervise day-to-day work of students
  - Contribute to student evaluations

Note on educational coordinators: In some agencies, especially those with multiple programs, a practitioner might fulfill the role of "educational coordinator" without being a primary field instructor. This option allows one individual to take over the planning aspect of rotations and the primary field instructors to concentrate on the rest of the coordination.

### Incentives for Field Instructors

Because the model asks field instructors to expand their traditional scope of work, it is important to understand and speak to the incentives that may motivate them to take on these additional responsibilities. Field instructors who participated in the initial HPPAE demonstration sites noted the following as effective incentives for taking part:

- Stronger connection to the university and the benefits that come with having an academic affiliation
- Increased opportunity to collaborate with others in the field of aging
- Greater networking opportunities to share resources and best practices
- Greater opportunities to teach

## Essential Component 5: Targeted Student Recruitment

### General Description

Recruiting students to the field of aging remains a challenge, partly because of persistent biases and assumptions that many people have toward older adults and geriatric work. While the HPPAE model works to dispel these misperceptions, university-community partnerships should be prepared to make active student recruitment an essential part of the program. Student recruitment is most successful when these principles are in place:

- A school-wide commitment to geriatric social work education by the dean, faculty committees, admissions, and development office. A close partnership between the field education office and the school's admissions office is crucial.
- At least one faculty member who will “champion” the HPPAE and the importance of geriatric social work as a profession and who will focus specifically on recruitment over the long term.
- Understanding that recruitment is an ongoing, yearlong activity—and that it gets easier after the first year of your HPPAE. Eventually, your recruitment strategies will become institutionalized in your annual marketing and outreach activities.

### Benefits of Student Recruitment

Proactive recruitment will go a long way in attracting the best and the brightest to the field, creating an ever-widening network of HPPAE students and graduates who can act as ambassadors for the program and strengthen the geriatric workforce.

### Implementation Guidelines

#### When Recruitment Should Begin

Student recruitment should be addressed as early in the process as possible.

“While in the HPPAE program I was able to learn in three different agency settings, for-profit, nonprofit, and working with older adults. This model also forced me to step outside of my comfort zone, to learn in new and different ways. It challenged me to speak up, take initiative, and learn fast.

As I learn more each day about what it means to be a leader, I look back and am thankful for the dynamic experience I had in the HPPAE program. I know that the HPPAE program is the foundation on which I am building as I move onward and upward in my geriatric social work career.”

— Lisa Tatge, HPPAE Graduate, University of Iowa School of Social Work

#### Who to Involve in Recruitment Efforts

Successful recruitment is a group effort that can involve:

- Field instructors
- Directors of admission
- Current HPPAE students
- HPPAE graduates employed in the field of aging
- Deans
- Field education staff
- Admissions committee members
- Development officers
- Publication staff
- Agency staff, including CEOs, field instructors, and other administrative personnel
- Undergraduate program faculty and staff

### Setting a Target Number for Recruitment

The number of students in a HPPAE will vary according to the size and interest of the student body, the time commitment of faculty and staff, and the scope of the community partnership.

### Profile of Potential HPPAE Recruits

- Students with knowledge of or interest in aging, possibly including individuals, or so-called “nontraditional students,” who already work in aging but do not have an MSW degree and are interested in applying to a graduate social work program
- Students who are just entering the social work program and attending orientation, regardless of whether they have selected a concentration
- Students with advanced standing
- Students with strong research skills who appear to be responsible, motivated independent, resilient, and confident

\* **Tip:** Interviews and references, including references from prior field instructors and/or employers, should be used in the selection process.

### Recruitment Strategies That Work

We have found the following to be the most persuasive “selling points” for encouraging students to apply to the HPPAE.

#### Field rotations:

Our research consistently shows that the rotational model especially attracts because it offers opportunities for instruction and immersion in multiple settings. It is also important for participants to hear that, as interns, they will be treated as students, not as employees or substitute staff.

#### Stipends:

The availability of stipends (or fellowships) is helpful in getting students interested in geriatric social work. Where available, the amount of stipend varies from school to school—stipends at existing HPPAEs have ranged from \$1,500 to \$7,500 and should be at a level necessary to secure and motivate, rather than establish, program interest. Please note that many HPPAE are functioning well without offering stipends because students are motivated to prepare to be effective practitioners in aging. To determine the right amount of stipend for your HPPAE, assess:

- Tuition and other university, educational costs, as well as local cost of living expenses
- Stipends in other fields of practice; often, stipends in child welfare and mental health are quite high and easily attract students
- Availability of stipend funds from schools, agencies, and other organizations that may be willing to offer support to attract good students

#### Peer endorsements:

Word-of-mouth testimonials from former and current HPPAE students are extremely influential. Many schools have second-year HPPAE students actively recruit first-year students at field placement days and special events at school and in the field.

#### Strong instructional support and the HPPAE brand:

HPPAE students also indicated that the opportunity to participate in a specialized curriculum increased peer and field instructor support. Access to specialized resources influenced their decision to specialize in aging, as did being part of an innovative, nationally recognized model.



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#### Job placement or career opportunities:

Once informed, students understand that specializing in aging can position them well in the current and future workforce, given the country's changing demographics.

"My HPPAE program was a demanding and intense experience, and it was just a great introduction to the field of aging. I am now a psychiatric clinician at the Acadia Hospital in Bangor, Maine, a nonprofit psychiatric and chemical dependency treatment provider. Whenever I serve older patients, I put my HPPAE learning to use."

— Mary Kellogg, HPPAE Graduate, University of Maine School of Social Work

#### Additional Recruitment Strategies

You may also reach out to potential students through:

- Recruitment talks in foundation-year classes
- Information in booths at field placement fairs
- Announcements via your listservs or e-mail newsletters
- Brochures mailed to incoming students
- Open houses at aging agencies
- Conferences on aging issues, didactic seminars, and talks by experts in aging
- Promotion of the project in all application materials for the school or department of social work or social welfare
- Talks at concentration selection workshops
- Creation of student interest groups
- Formation of Gerontology Student Associations

Reach out to faculty as conduits to the students and as champions of gerontology through:

- Presentations about the project at faculty retreats
- Assisting faculty to incorporate aging content into foundation courses, increasing interest in aging through discussion of aging issues in the classroom

\* **Tip:** Existing HPPAEs use a combination of recruitment strategies tailored to their individual social work programs and needs. We recommend experimenting with combinations of strategies and tracking results (e.g., conducting surveys on how students first learned about your program) so you can refine your recruitment efforts.

## Essential Component 6: Leadership

### General Description

The future of the geriatric social work profession depends on our current and future generations of leaders whose vision and drive will motivate more students to join the profession and shape aging-care policy for years to come.

Participants in the HPPAE are encouraged and trained to become leaders in the field of social work education and geriatric social work practice. The HPPAE provides different opportunities for leadership, depending on the participant's role:

- For faculty members who initiate a HPPAE program, leadership means both the ability to inspire students to pursue careers in aging care and the responsibility to build a sustainable program—from making the case for support to the social work dean or director to developing a network of field instructors to mentor your students.  
For deans and directors at schools that have implemented a HPPAE program, leadership means being at the forefront of developing the workforce of social workers to care for America's future and setting an example for other schools to follow in adopting this rotational, competency-based, partnership model of learning.
- For field directors charged with placing students in agencies through the HPPAE, leadership means being a key liaison between the university and the local community, helping to foster a mutually beneficial partnership that will serve academic, clinical, and public-interest goals.
- For field instructors who direct internships for HPPAE students, leadership means introducing newcomers to the rewards of caring for older adults and dispelling some of the myths and fears about the geriatric professions.
- For students who complete the HPPAE curriculum, leadership means becoming ambassadors for the field of aging care, whether that takes the form of mentoring students, educating colleagues from related professions, or contributing to and influencing public policy to improve aging care.

### Leadership Qualities

Regardless of the specific opportunities for leadership that the HPPAE provides, there are certain qualities of leadership common to all leaders and certain activities that social work educators and students can take to advance the issues of aging care.

Theories abound as to what makes a leader, but there are at least four characteristics common to all good leaders:

1. **A leader knows the intended outcome.**  
When you ask people to follow you—in launching a HPPAE or any endeavor—you need to know up front what your ultimate goal is and how you expect people to participate in reaching that goal.
2. **A leader builds collaborations with individuals holding different opinions.**  
The key to success is to engage in dialogue and find common ground so that these individuals can become part of, not opposed to, your plans. In academia, as in any business or institution, you will encounter smart people who disagree with your ideas and approach.

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- 3. A leader knows what an audience is ready for.**  
Be sensitive to the assumptions, workload, and habits of the people who you want to follow your big idea. It may take some time to lay the groundwork and make a few internal adjustments before your group or institution can move forward.
- 4. A leader is prepared to succeed.**  
There is an old saying: “Be careful what you wish for, because it may happen.” Look beyond achieving your goal to how you will sustain it. Put the systems in place to handle success when it comes.

#### Leadership Activities

There are two critical things you can do as a leader in the field of geriatric social work:

1. Work to improve the perception that other professions (including other social workers) have of the discipline.
2. Become advocates for improved policies that support healthy, independent aging for older adults and support for their caregivers.

Specific activities that HPPAE participants are encouraged to pursue include:

- Develop a macro view of aging care; i.e., connect your understanding of individual client issues to the big picture of policy, demographics, funding, workforce supply, etc.
- Initiate special projects—from developing the idea to finding funding.
- Prepare papers and posters for presentation at conferences and meetings.
- Keep abreast of relevant legislative issues, from tuition reimbursement to health-insurance coverage.
- Polish your communications skills, including the ability to express ideas clearly in writing and on the page and to be a dynamic presenter.
- Get others committed to studying, teaching, and/or practicing geriatric social work.
- Learn how to do policy advocacy at the local, state, and federal level.
- Engage with the media, including writing op-eds and letters to the editor and using your research to pitch stories to the media.

## Getting Started

If you are reading this manual, chances are you are committed to the idea of starting a HPPAE in your department or at your school. In this section, we offer key questions that you will want to ask yourself as you design your HPPAE to test its feasibility and to ensure that you are maximizing local resources and expertise to get the program off the ground.

### Key Questions for HPPAE Design

Questions for Your School or Department:

1. **Where within your school or university are there advocates and champions of aging care?**
  - Who are the aging advocates?
  - Who are the advocates for increased community collaboration and service?
  - Who are the advocates for innovation in social work education?
  - How can these advocates be mobilized in support of the HPPAE?
  - Is there an appropriate institutional (rather than individual-level) base for the program?
2. **Do you have the human resources necessary to staff the HPPAE?**
  - Who would be a strong candidate for the director position and what strengths does he or she bring to the program?
  - What are the advantages and disadvantages of having the field director oversee the HPPAE?
  - What are the advantages and disadvantages of having a faculty member oversee the HPPAE?
  - Who would be a strong candidate for the coordinator position and what strengths does he or she bring to the program?
  - Who is best positioned to evaluate the program?
  - What other staffing roles are needed?
3. **What are the educational resources available to ensure that students have sufficient academic training for aging-focused field placements?**
  - Are there classes and/or other educational opportunities available through the school or the university?
  - What needs to be done to ensure that students can and do access these opportunities?
  - How will gaps in the curriculum be filled?
4. **What are the characteristics of social work students with current or potential interest in aging?**
  - How many are there?
  - What are their skills and experience?
  - What are their financial and time constraints?
5. **What resources are needed and available to support the HPPAE?**
  - What kind of staff support is needed and available?
  - What kind of financial resources (including in-kind) are needed and available?
  - How likely is it that these resources will continue to be available?



## SECTION 2

### Designing and Implementing Your HPPAE

#### Questions for Community Agencies:

- 1. What are the characteristics of the local aging community?**
  - What is the size of the aging population relative to other populations?
  - What are the community's characteristics and needs?
- 2. Which local agencies have an aging focus or serve a large aging population?**
  - What type of services do these agencies provide?
  - To what extent do they need staff focused only on aging, as opposed to staff with a more generalist knowledge and skill base?
  - What experiences will students likely get at particular placements?
- 3. What is their experience with students in general and with social work students in particular?**
  - What is their interest and capacity with respect to field placements?
  - To what extent are they interested in providing training and educational opportunities to students, rather seeing students as inexpensive labor?

#### Adding or Adapting Components

You may elect to add or create additional components tailored to your setting. For example, you may decide to add a component because you want to:

- Commit resources to serving a particular population (e.g., low-income older adults)
- Offer a specific type of service
- Fill an important education gap that your MSW program does not provide

Below are some sample additional components that HPPAE demonstration sites chose to adopt:

- A public service component that operates exclusively in county departments of aging
- A faculty stipend for summer internships at an agency of the faculty member's choice; the internship updates faculty on current geriatric practice and encourages them to integrate that knowledge into the courses they teach
- A job placement component to help graduates find employment in the field of aging; this component may include a job bank and/or career counseling
- An alumni leadership component that recruits HPPAE alumni to participate in an advisory capacity or as field instructors



## SECTION 3

Evaluating Your  
HPPAE

## SECTION 3

### Evaluating Your HPPAE

#### Why Evaluate?

Ongoing evaluation is recommended for each HPPAE to document progress and outcomes, and to continuously improve the quality of your program. HPPAEs should evaluate their own program or join other programs in a multi-site evaluation. Evaluation will help you:

- Assess whether your HPPAE is meeting your educational goals, including increased student knowledge and interest in aging, as well as practice competency
- Generate empirical data to demonstrate effectiveness to current and potential funders and other stakeholders
- Identify areas where the model could be improved or adapted
- Examine stakeholder (i.e., students, faculty, agency staff) satisfaction with the program and its implementation
- Develop materials that can be used to market your HPPAE to prospective students, faculty, and agency staff
- Inspire other practitioners in the field to learn from and adopt the model

#### What Are Indicators of Success?

The HPPAE can be evaluated at two levels: student and institutional. Basic indicators of the HPPAE's success at the student level include:

- Student gains knowledge of aging, including services available to older adults
- Student gains skills and interest in working with older adults
- Post-graduate employment in the field of aging
- Overall competence, accomplishments, and leadership in the social work field

Basic indicators of success at the institutional level include:

- Increased number of students specializing in aging in the graduate program
- Increased number of students enrolled in aging courses
- Increased number of students in aging-field placements
- Increased number of agencies providing services to older adults involved with the field education program
- Improved communication and collaboration between the university and agencies serving older adults

#### Designing Your Evaluation

The HPPAE can easily be evaluated using pre- and post-tests to assess process and outcomes at both the student and institutional levels. Students should be surveyed prior to starting the HPPAE and upon completion. If resources are available, you may also consider surveying a comparison group of students. For ease of implementation, surveys can be administered online using publicly available survey tools. Institutional data are generally available in a school's administrative or dean's office. Such data are often required in proposals, administrative reports, and reports to funders.

CSWE has evaluation instruments posted on the HPPAE section of the Gero-Ed Center website that can be downloaded and used in full or in part.

- \* **Tip: Before you finalize your evaluation instruments, think through your process for data management and analysis. This will ensure that the data you gather will be put to practical use.**

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#### IRB and Human Subject Considerations

Prior to beginning your evaluation, contact your organization's Institutional Review Board (IRB) to find out if an IRB review is required. Some IRBs have considered the HPPAE exempt because of its educational focus. Others have not. Either way, you should be sure to abide by the conventions of ethical research, including fully informing participants regarding evaluation activities. Similarly, use and reporting of evaluation data should protect the confidentiality of participants.





## SECTION 4

Sustaining Your  
HPPAE

## Creating a Long-Term Fund-Raising Strategy

One of your primary goals should be to integrate the HPPAE into your MSW program as a permanent fixture. While many programs start out with an infusion of initial funding from a foundation or donor, these funds may not continue at the same level, or they may require matching grants. That's why it is critical to cultivate other funding streams early on to sustain your program over time.

Fortunately, many HPPAEs have found that once the program became part of their integrated field education curriculum, the costs diminished and the primary budget need shifted to student stipends. The other good news is that you don't have to be a professional fund-raiser to help sustain your HPPAE. The foundation of successful fund-raising is having strong relationships. Relationship-building is a major cornerstone of effective social work and the sustainability of your HPPAE as well, and many of the same principles apply, including understanding your audience, cultivating trust, and communicating clearly.

Even with limited time and fund-raising expertise, there are several reasons to be optimistic about your ability to sustain your HPPAE:

- **Resource diversity**  
There are many different ways to build and support your HPPAE.
- **A track record of success**  
Other schools are sustaining their programs and willing to share their lessons learned so that you can do it, too.
- **Funding trends**  
More grant-makers are giving to aging issues.
- **Awareness**  
Public recognition of the aging boom creates opportunities.

The first step to sustainability is to develop a fund-raising plan that includes partnerships that will help achieve your short- and long-term goals. We recommend establishing a funding timeline, with an end goal of institutionalizing your program within four years, setting benchmarks along the way.

As part of this planning process, you will need to engage with a number of groups. These include:

- University or school development officers
- University deans/directors
- Executive directors of community-based agencies
- Development officers at community-based agencies
- Faculty
- Alumni
- Major donors

### Internal Resources

Fund-raising is critical, but it is not the only factor involved in sustaining a healthy program. New programs in particular require champions, both internally and externally, to maintain quality and continue to improve and adapt the program to evolving needs. The most successful HPPAEs have strong support and commitment of their deans/directors, agency CEOs, and staff for fund-raising, as well as resources to develop, sustain, and evaluate the program.

Below are resources both within your university and at your HPPAE university-community partnership that you can tap for financial and in-kind support.

### Development Office

Most development offices are staffed by professional fund-raisers who raise funds for the institution's operating expenses, programs, and special events. If your school or agency has been assigned a liaison in the development office, schedule a meeting with that person to discuss your ideas and determine how he or she can be helpful. Do not hesitate to suggest an innovative proposal that you may have developed within your program that the development staff may not have considered.

If your school or agency does not have a designated liaison, find out who in the development office has expertise in your proposed program area and ask to meet them. Offer to send a draft of your ideas or proposal before the meeting and/or the questions you would like to address. This gives development officers the opportunity to get familiar with your project and to do background research so you can hit the ground running and make the most of your meeting time together.

### Dean, Director, or Agency Executive Director

Securing the support of the dean, director, or agency executive director is integral to the long-term sustainability of a HPPAE because fund-raising is one of their core charges and their leadership stature will raise the prominence of your HPPAE. Specifically, work with the dean/director to identify funds that can be reallocated from the school's budget to support the HPPAE. The dean's office discretionary fund may support grant-writing costs.

### Faculty

Many faculty members are adept at finding money to support their research projects. In the course of looking for funding for research projects, faculty may come upon money to support service and education projects. There is also the possibility that a faculty member's research interests will overlap with the HPPAE. Discuss your ideas or proposal with your academic colleagues; they can often provide helpful leads.

### Community Agencies

Colleagues in community agencies, especially those who depend upon "soft money," are also adept at securing funding. There may be opportunities to include a component of your program in a partnership member's grant if it can be linked to client services. Agency colleagues may know of foundations and individual donors who might be interested in your program. They may have submitted a similar proposal that was funded that you could use as a guide in making your case to funders.

### Alumni

Just as your university relies on alumni for fund-raising, you can, too, for your HPPAE. Because the field of aging has not been as well funded as other practice areas, alumni who specialize in aging may be especially sensitive to the need to support a program like the HPPAE. We have heard from HPPAE graduates who say they feel indebted to the program, and almost obligated to "pay it forward" by supporting another student. Keep in mind that some alumni prefer to support specific initiatives, programs, or even a specific student rather than contribute to a general operating fund, so how you frame your funding request is critical. While individual contributions may seem small relative to a foundation grant, they can add up when pooled together. An important additional benefit of this approach is that your donors can become your word-of-mouth foot soldiers, which can help bring in more supporters.

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## Sustaining Your HPPAE

Alumni should also be encouraged to provide non-monetary support. One of the most powerful ways alumni can give back to the HPPAE is to become a field instructor.

Case in Point: The Agency for Gerontology Intercultural Field Training (A-GIFT), a Houston-based-HPPAE, engaged with gerontology alumni to:

- Mentor current gerontology students
- Staff their Employment Information and Referral Services
- Provide training to para-professional service providers in aging-care agencies
- Evaluate and disseminate products from the para-professional training program
- Teach continuing education courses in Houston's Graduate School of Social Work's Human Services Certificate Program in Gerontology

### Communications Office

Every university, if not every school within the university, has an office dedicated to publicizing the institution's activities. Your school may have a dedicated staffer within the communications office that is charged with publicizing the social work school. If your school does not already have such a person, aim to foster a relationship with someone in the development office who is interested in the field. Communications staff members engage in media relations, post news on the university's website, run visitor tours, and produce publications—all of which can help attract students and raise your profile with potential funders.

### Other University Resources

- **Research office:**  
This university office typically has extramural funding contacts.
- **Work-study programs:**  
This student financial-aid resource can also be a source of student stipends for your HPPAE.
- **Continuing education:**  
You may coordinate with this program at your university to formalize an incentive for field instructors and community agencies to work with the HPPAE and earn continuing education credits.
- **Interdisciplinary programs:**  
Talk with members of other geriatric fields, such as nursing and medicine, to see if there are joint funding opportunities.

### External Resources

In this section, we provide information about where to look for external support for your project.

#### Foundations

The number of foundations that fund aging as a discrete program area is relatively small, but funding for aging issues can be found under broader programs areas such as health, public health, mental services, and families. The Foundation Center ([www.fdncenter.org](http://www.fdncenter.org)) is a good place to start when looking for foundation funding.

It offers a comprehensive scope of information about private and corporate foundations and individual donors.

The center also provides education, training, and seminars on proposal writing and other grant-seeking skills.

## Government Funding

Within the federal government, there are departments, agencies, and offices that provide funding for programs, education, research, and services related to aging.

The government has a website that serves as a searchable point of access for 900-plus grant programs from all 26 federal grant-making agencies ([www.grants.gov](http://www.grants.gov)). The VA is one such source for funding.

Because older adults frequently do not receive adequate mental health services, there are opportunities for HPPAEs to secure mental-health grants to expand services or support a research agenda.

State governments administer various titles under the Federal Older Americans Act of 1965, and a variety of state-funded programs that serve the elderly. These programs are administered through Area Offices on Aging (AOA), Area Agencies on Aging (AAA), or local departments for the aging.

### Case in Point:

**The University at Albany has received funding from the State of New York to support its HPPAE. Check with your state Medicaid Office to determine if social workers are reimbursed for services to clients. If so, your students may be reimbursed for the services they provide.**

## Local Businesses

Local businesses want to be “good citizens” of their respective communities and will often make small donations to support some programs. Existing HPPAEs have successfully obtained support from medical supply companies, local restaurants, and banks. Local businesses—as opposed to multinational corporations—tend to be better targets for fund-raising because of their strong community ties. Also, their executives and employees typically have stronger alumni relationships to their local universities.

## Major Donors

Identifying individual major donors requires time, but it can pay off substantially. The key is to find people with a track record of giving to aging, education, or health programs. Start by making a list of the foundations and agencies that have funded initiatives of relevance to the HPPAE. Then look at their annual reports, websites, and marketing brochures to see if some of the seed money came from large contributions from individuals or families. Similarly, make a list of nonprofit organizations that advance aging issues, and look at their donor lists. You may have the most success by narrowing these lists of individuals to correspond to those living in your region.

It’s worth noting that the average age of major gift donors is 72—precisely the demographic that is concerned about aging care. Engaging this cohort as stakeholders in the process can be effective.



## SECTION 4

### Sustaining Your HPPAE

#### Fund-Raising Do's and Don'ts

Once you've researched and identified a shortlist of potential funders, keep in mind the following Do's and Don'ts for approaching them.

##### DO:

- **Do your homework to find the right match.**  
Target your efforts by researching which foundations and donors have a stated mission and/or track record of supporting aging issues. Examine their program areas, their list of grantees, and their annual reports for insight.
- **Build relationships with funders.**  
Relationships are the key to successful fund-raising. Start with an introductory letter or an in-person meeting in which you outline your organization's mission, goals, services, population served, accomplishments, and the relevance of your work to the foundation's stated interests. Be prepared to discuss substantive ideas or future projects.
- **Look for private donors who may be motivated to sponsor a specific program or an individual student(s).**  
Donors may be alumni and friends of alumni, contacts among staff and your school's development office, or individuals who have given to similar issue areas, who you may find by scanning the donor or supporter section of Websites.
- **Ask about matching gifts.**  
Many employers will match contributions made by employees. Be sure to ask individual donors if their employers offer such a program.
- **Identify innovations and angles in your HPPAE.**  
These may match the specific interests of funders. For example, there may be crossover between a funder's strategic interest and a component of field training that focuses on elder abuse, immigrant communities, or caregiver support. Tie your work to the donor's objectives and priorities.
- **Work your connections.**  
Review the foundation's board of trustees and staff lists to see if you or someone in your school or agency knows anyone. Having a point of contact may help facilitate a meeting with the foundation and help pave the way for your proposal.
- **Get to know program officers.**  
Identify the program officer who covers your program area and schedule a "getting-to-know-you meeting." Program officers are experts in their areas and good people with whom to brainstorm because they're plugged into the foundation world and can help guide you to other resources.
- **Look for existing payment streams.**  
These could include allocating student funding in appropriate contracts to serve as stipends/ equivalents or dedicating the field instructor role within the supervisor role in service contracts.
- **Pay attention to funding cycles.**  
Foundations have specific time periods during which they fund projects. Hence, it is important to ascertain when the trustees meet or when the foundation makes awards. Although a foundation may like your ideas or project, it may be unable to fund it right away. So, keep in touch; inform the foundation of other grants received to support projects in your school or agency.

- **Follow up.**  
Once you have met with the foundation, remember to send a thank-you letter—good manners go a long way.
- **Follow the rules.**  
When writing and submitting a letter of intent or proposal, follow the foundation’s guidelines and instructions for the letter. Foundations receive hundreds of proposals and have developed formats, submission dates, and funding cycles that work for their staff and boards. Ignore their guidelines and you run the risk of having your proposal being rejected before it is read.

**DON’T:**

- **Submit unsolicited proposals.**  
They end up in the trash.
- **Ask for funding during the initial contact.**  
Your first contact with a foundation should be to introduce yourself and begin the process of building a relationship.
- **Double dip.**  
Find out if the foundation has funded or is currently funding a project or research in your school or agency because some foundations do not fund more than one project simultaneously within an institution. It may not reflect well on you or your institution if you do not know this information and the foundation brings it up.
- **Let a rejection go unanswered.**  
Follow up and ask for feedback so you can make improvements. Use the opportunity to ascertain whether you should resubmit to this source in the future or submit elsewhere.
- **Underestimate the value of small donors.**  
Their contributions can add up—they may also lead you to major gifts.

**Writing a Winning Proposal**

Writing successful proposals is both an art and a science. Keep the following principles and structural guidelines in mind.

**Key Principles****Check the guidelines:**

Check the funder’s website to see if it has specific proposal writing guidelines and follow them.

**Know your “unique selling proposition”:**

One of the most critical things funders look for in a proposal is your ability to fulfill an important need that no one else is addressing. This requires that you have a sophisticated analysis of the lay of the land, and a compelling argument for why and how your project will get results.

**Build on success:**

According to Sarah Collins, editor of the Foundation Center’s Guide to Winning Proposals: “The proposal most likely to bring us success...is the version of the most recently funded proposal you wrote for the very same project sent to a similar foundation.”

## Key Components

### Executive Summary:

This is a brief summary (abstract) of the proposal that includes a statement about the request, the need or problem you are addressing, the program you are proposing, and a brief summary of your organization. Executive summaries are typically one to two pages or 250-500 words.

### Statement of Need or Problem:

This section explains why your project is necessary and relevant to the identified need. Your scope of the problem should demonstrate depth of knowledge and a sophisticated analysis, supported by relevant data and statistics. If there are existing models or approaches that have addressed this problem, acknowledge them and describe their limitations as well as what makes your project different.

### Objectives:

Be sure to include a concise, specific description of the overall goals of your project, proposed outcomes and accomplishments, and how they will be measured.

### Program Description and Procedures:

This is the core of the proposal and frequently the longest component. It features a detailed description of the proposed program components that respond to the identified need, including specifics on who will benefit and how. Include a plan of action that details what is to be done, by whom, for whom, how, and when. Describe the merits of your proposed solution and why you are particularly qualified to carry out the program for which you are seeking funds. Include a work timeline. Remember to include a statement about how your project will advance the foundation's program goals.

### Sustainability:

The issue of sustainability and past funding from other funders for a similar project should be addressed in this section. You want to:

- Make clear to funders that they are not supporting the program in perpetuity; this is time-limited support.
- Acknowledge additional and existing sources of funding. Funders will often request that you identify other sources of funding that you are pursuing and funds you currently receive. Existing support from a foundation adds credibility to your proposal.
- Identify categories of support:
  - Administrative support
  - Scholarships/stipends
  - Field instructors
  - Reiterate that the long-term goal is to institutionalize the program so it is absorbed by your school or agency.

### Evaluation Plan:

The evaluation plan provides details about the program's impact and objectives and how you will measure them. Include evaluation methods, types of information to be collected, instruments to be used, and how information will be reported. Evaluation criteria should be included for each objective. Lay out clear outcomes; for example, the project will:

- Increase the number of students in aging
- Increase the number of aging courses
- Strengthen the connection between the field and classroom
- Strengthen the aging service network
- Increase students' knowledge of aging

## SECTION 4

### Sustaining Your HPPAE

#### Personnel:

Provide detailed information about how the project will be staffed, including the employees' experiences, credentials, their scope of work, and the amount of time they will spend on the project. Include a curriculum vitae for each staff person in an appendix. Identify consultants and provide a description of their experiences and justification for their use.

#### Dissemination:

Dissemination—how information gleaned from the project will be shared with others—is not required in all proposals, but will likely be an important component of a project like the HPPAE, which folds into a larger national network of similar projects.

#### Budget:

This should be a realistic presentation of program costs, including projected expenses and revenue (other sources of funding, in-kind contribution). If you are applying for a multi-year grant, include a detailed budget for each of the years. Please note that some funders require a budget narrative that provides more details about proposed expenditures and an explanation of unusual expenditures.





## SECTION 5

Marketing Your  
HPPAE



## Bringing Key Stakeholders On Board

Getting a HPPAE off the ground and running—and sustaining it—requires bringing a number of key stakeholders to the table from both the university and the community. They are:

- Faculty Members
- Field Directors
- College Administrators (Deans and Directors)
- Field Instructors
- Students

Note: Another important audience for the success of the HPPAE, of course, is funders. You can learn how to appeal to them in Section 4 of this guide, “Sustaining Your HPPAE.”

Bringing these stakeholder groups on board requires effective communication. When we talk to people about a new idea, they don’t come to us with a blank slate. They process everything they hear through the filter of their own worldviews, experiences, and values.

## Five Core Messages

In this section, we will introduce you to the HPPAE Message Platform, which is made up of the five essential messages that each of your target audiences should know about the HPPAE. Customized messages that appeal to each of the five stakeholder groups are located on the CSWE Gero-Ed Center website.

### The HPPAE Message Platform: Five Core Messages

#### Message 1: Demand

An unprecedented number of Americans are growing older and living longer. This demographic shift is triggering rising demand for social workers trained in aging care and services. Yet these social work specialists remain in short supply.

#### Message 2: Leadership

The HPPAE initiative is recruiting and training the next generation of social workers who specialize in aging by transforming how geriatric education is taught at MSW programs nationwide. Developing a HPPAE at your school and in your community will establish you as a leader in the field of aging and social work.

#### Message 3: Proven and Tested

The HPPAE is a nationally recognized model. It has been tested and proven to be effective at recruiting and training students in aging who have gone onto careers in the field of aging.

### Message 4: Partnership Feature

The HPPAE is driven by innovative partnerships between universities and community-based agencies: class time and fieldwork provide students with wide-ranging, hands-on experience in older-adult care and services.

### Message 5: Rotational Model

At the core of the HPPAE is a unique field education model that rotates students through more than one agency so they gain a broader view of older-adult care, and a more sophisticated understanding of the services and support systems involved.

### Making Your Message “Stick”

It’s one thing to know what your messages are. It’s another thing to make them stick in the minds of your target audiences. Below are a few good rules of thumb.

- **Be consistent, and repeat.**  
Professional communicators will often talk about the virtues of “staying on message.” This means that, across every platform—whether it’s a PowerPoint, your website, or a recruitment talk you have with first-year students—you consistently hammer home the same core messages.
- **Tell stories.**  
There’s a famous adage in public speaking: “In a two-hour presentation, people remember a two-minute story.” That’s because human beings are hardwired to retain information better if it is wrapped in a narrative. In the case of the HPPAE, this could mean underscoring a point with an anecdote about a particular student’s rotation or a “skeptical” faculty member who came around to support the HPPAE after participating in it.

- **Keep it jargon-free.**  
Use plain, descriptive language, particularly when talking with new students and audiences who may not be as imbedded in the field as you are. While there will be instances when using more technical terms makes sense, the discipline of keeping your language jargon-free (say, at the level of a typical Newsweek article) is a good communications practice. It will help keep you from “talking shop,” so to speak, and remind you to hit the big themes and principles that you want people to keep in mind.

## Supporting Facts

Below are additional statistics and arguments to help you make the case for your HPPAE to funders, university decision-makers, and others.

### Demographic Trends

- **Americans are getting older.**  
By 2030, one in five Americans will be 65 or older. By 2050, there will be roughly five times as many Americans age 85 or older than there are today.
- **Americans are living longer.**  
Thanks to important advances in medicine over the past century, many older adults are experiencing better health and adopting healthier lifestyles, which are prolonging their longevity.
- **Long-term care is evolving.**  
As adults age and live to be 85 and older, they are confronted by many challenges to their physical and cognitive functioning, and thrust into a new world of social supports and resources that they must learn to navigate. Chronic disease and disability now replace acute illness as the most common types of health problems for older adults, requiring long-term collaborative management by health-care professionals, patients, and families. At the same time, the service system has become increasingly complex and fragmented. Many older adults and their families struggle to navigate the system to access the services they need.

## Why We Need More Social Workers Trained in Aging Care

The rising number of older adults is spurring an urgent demand for skilled, competent geriatric care professionals at every level. An IOM Report (2008) concluded that the supply of health care providers, including social workers, is inadequate for meeting the health and psychosocial needs of older adults.

At the center of this hub are social workers, who are uniquely trained to make a 360-degree assessment of their clients, from their social support system and community environment to their psychological and medical needs. This makes social workers qualified to help older adults and their caregivers:

- Navigate the increasingly complex maze of health and social services
- Coordinate care by identifying and finding the right level of support, including case management, information and referral, mental and behavioral health counseling, and long-term care planning
- Relieve depression and stress
- Increase well-being and improve quality of life by strengthening support networks
- Delay or prevent nursing-home admissions and reduce health-care costs

### Describing the Workforce Shortage

- Despite the growing need, social workers specializing in aging are in short supply.
- The Bureau of Labor Statistics (2004) estimates that 60,000 to 70,000 professionally trained social workers will be needed by 2020 to work with older populations, yet less than 10% of that projected number is now available.
- According to NASW (2006), only 9% of a sample of licensed social workers identify aging as their primary field of practice. Nearly 75% of these licensed social workers worked in some capacity with older adults but had not been trained to do so.

## Marketing and Outreach

### Venues

Below are prime venues to spread the word about your HPPAE and educate key audiences and the public about the importance of drawing more social workers to the aging-care field.

#### 1. Professional Conferences.

Conferences are arguably one of the most important venues for connecting with peers in your field. They are great places to share the HPPAE as a model for other schools and to grow the workforce of aging-care social workers. Identify opportunities to present information about the HPPAE either as part of a panel or in a more individualized format.

#### 2. Media Relations.

Your local media can be a powerful conduit for reaching and educating your community about the HPPAE and its goals. Below are some ideas for making news:

- **Beginning and end of school year.**

Whether you are welcoming a fresh crop of students or sending off graduating ones, the beginning and end of the school year are good opportunities to engage reporters about the HPPAE. Pitch how your school has developed special tactics to recruit students, discuss the rotational model at work, or talk about how your graduates are now entering the workforce at a time of high demand for their skills.

- **Research and special projects.**

Possible story ideas include students who may be working with a specific older population with unique needs, such as Hmong immigrants or former drug users. Students may also be working on research related to trends and issues like elder abuse.

- **Jobs and careers page.**

Many local print and online media feature a weekly section or column on careers and jobs, including profiles of local professionals with information about how they got into their profession and what the job entails. These are great places to pitch a story about a HPPAE graduate who is now working in the field.

- **Rapid response.**

Write letters to the editor in response to stories about older adult care and their caregivers. Keep in mind that many people are not aware that social workers can help with many of the issues they're struggling with. You can make this point and segue into the need for more aging-care specialists in the field. The letters page is often one of the most read sections in the paper!

#### 3. University and Trade Press.

University publications can also be important for visibility and building support at your school. Stories in alumni newsletters can also help with fund-raising. Professional trade publications for social workers and other health-care professionals can help you educate this broader audience about the unique role that social workers fulfill as well as your school's leadership in growing the field.

## Essential Collateral

Below are five essential collateral pieces to promote your HPPAE and five tips on how to make them as effective as possible.

### Five Essential Collateral Pieces

1. **Website.**  
Several HPPAEs have a “landing page” on their school’s website that appears on the home page and leads to more information, including:
  - An overview of the program with information about its origins, innovation, and successes
  - Details on the rotational model and the university- community partnership
  - Instructions on how to apply
  - Testimonials from faculty, deans, students, and alumni
2. **Brochure.**  
This can be a simple, folded, multi-panel piece with information relevant for a shelf life of one to two years to save on reprinting. Make your brochure available for download on your website
3. **PowerPoint.**  
PowerPoint has become a must-have for presenting at conferences. To make yours stand apart from the pack, invest time in graphics.
4. **Newsletters and University Publications.**  
Print and online newsletters are effective and timely ways to keep funders, alumni, and others abreast of new developments at your HPPAE. Also seek opportunities for university-level exposure, such as getting a story about your HPPAE placed in a university magazine, alumni magazine, or other publication.

5. **Flyers.**  
These are used primarily to promote on-campus speaking and recruitment events with HPPAE faculty, community agencies, students, and/or graduates. The best fliers catch your eye from a distance because they feature a thought-provoking headline — in a large font. Graphic images help, too.

### Four Tips for Collateral Production

1. **Don’t forget the “vision” thing.**  
There are a lot of facts to communicate about the HPPAE, from stipends to seminars. But take the time to inspire people with the big picture as well: America’s demographic sea change and the enormous difference social workers can make in people’s lives.
2. **Include testimonials.**  
Short stories and quotes from students, graduates, faculties, and agency heads add credible and varied voices to your materials.
3. **Use images.**  
Shoot for a mix of photos, such as:  
Active, older adults from different ethnic and cultural backgrounds  
Older adults with their extended families  
Older adults interacting with social workers
4. **Know your audience.**  
Appeal to the interest of your target audience. Most people scan materials quickly. Incorporate bold headlines and bullet points liberally and use reader-friendly formats such as Frequently Asked Questions.



