Course Title and Number: SW 712: Integrative Case Formulation

Instructor/Classroom: Classroom

Day/Time

Contact Information:

Office Hours:

Credits:

Pre-Requisites: SW 311/SW 611

Course Description

The focus of this course is on helping students develop a systematic approach for conceptualizing the issues that clients present with at each level of practice—micro, mezzo, and macro. Students will learn the case formulation process, beginning with the collection of assessment information from the client and others about predisposing stressors, precipitating events, cultural factors, supports and resiliency. Such information is often “messy” (Schon, 1983) and does not delineate a clear plan of action. In contrast to a mental health diagnosis or a psychosocial assessment summary, case formulation integrates all this information to tell a holistic, meaningful story of the client’s presenting problems. The problem may start with a behavioral or mental health issue. Through the assessment process, many other factors may emerge, such as domestic violence; limited access to treatment, unemployment, and homelessness. The problem that is identified after an assessment process may differ from the problem that is initially presented to the social worker. The connections between micro, mezzo and the micro factors in conceptualizing “what is really going on” are emphasized throughout. The goal is to use an integrated assessment approach to developing a client-centered treatment plan that honors the unique strengths of each client.

Linkages with Other Courses

This course builds on knowledge, values, and skills introduced either in the BSW program or in the foundation year of the MSW program. In particular, this course builds on the knowledge of human functioning and behavior attained in SW 310/610 and SW 311/611 (Human Behavior in the Social Environment I and II). In addition, students will apply knowledge of the helping process and communication and assessment skills, learned
throughout previous methods courses: i.e., SW420, 421, 424, 427 or SW620, 621, 623 and 624.

**Relevant Competencies and Associated Practice Behaviors**

2.1.1 Identify as a social worker and conduct oneself accordingly
   - C2 Provide social work leadership within practice contexts and as a member of the profession
   - C3 Cultivate and apply leadership qualities of self-awareness and other-awareness

2.1.2 Apply SW ethical principles
   - C4 Employ strategies of ethical reasoning in practice contexts that may have policy and value conflicts with social work service delivery, personal values, or professional ethics.

2.1.3 Apply critical thinking to inform and communicate professional judgments.
   - C6 Question, evaluate, select, and implement appropriate assessment, intervention and evaluation strategies for use within complex, multidimensional settings
   - C7 Question, evaluate, select and implement appropriate assessment, intervention, and evaluation strategies for use within complex, multidimensional settings
   - C8 Produce practice-ready presentations and documents that could include case presentations…

2.1.7 Apply knowledge of human behavior and the social environment
   - C16 Integrate understandings from a variety of theoretical perspectives to formulate complex and multifaceted assessments and interventions
   - C17 Identify and question underlying theoretical and ontological assumptions about human behavior guiding agency practices, programs and policies

2.1.10 Engage, assess intervene, and evaluate with individuals, families, groups, organizations, and communities.
   - 2.1.10a Engagement
   - 2.1.10b Assessment
   - 2.1.10c Intervention
   - 2.1.10d Evaluation

**Course Objectives/Educational Outcomes**

Upon completion of this course students will be able to:

1. Understand the link between the ability to assess and define an issue and the key characteristics of an advanced generalist practitioner—providing leadership, practicing autonomously, and dealing with complexity;

2. Provide a strengths-based, person-in-environment social work perspective as a member of a multi-disciplinary team;
3. Incorporate career-long learning into their practice—through a professional development plan delineating strategies for reflective learning, consultation and supervision and keeping updated on current theory and research about bio-psycho-social-spiritual factors that the student will encounter in practice;

4. Apply models of ethical reasoning to explore and resolve dilemmas encountered;

5. Integrate understanding from a range of theoretical perspectives in assessing clients across levels and field of practice;

6. Apply skills in engaging clients, including self-awareness, affect management, cultural humility and relationship building techniques;

7. Apply an integrative case formulation model to assess complex cases at all levels and fields of practice;

8. Integrate research findings as needed to inform a case formulation, as part of evidence-informed practice;

9. Analyze how assessment is used at various agencies (some agencies separate assessment and treatment, such as CPS) and realize that treatment plans must be built on assessment regardless of the structure of the agency; and,

10. Continuously check hypotheses about “what is going on” with the client, family, group, or community as part of the integrative formulation process.

**Instructional Methods**

The first half of the semester will focus on learning the case formulation method and practicing applying it to written case studies. The second part of the semester will focus on using the case formulation method as part of an interdisciplinary team. Guest speakers from multiple disciplines will present complex cases in class. The case formulation method will be applied from multiple disciplinary perspectives.

**Course Policies**

- **Class Attendance and Participation**: As much of the learning in this class is dependent upon class member contributions, you will be expected to come prepared and ready to
actively participate in every class meeting. Active participation will include: involvement in class activities and discussions, timeliness to class, and collegial conduct.

Students who miss 2 class sessions will lose 10 points. Students who miss 3 class sessions will lose 15 points. Those students who miss 4 or more class sessions will receive a grade of “F” for the course.

- **Disabilities:** Students who have documented disabilities that may affect their learning or performance in this class should contact the UNR Disability Services Office (Thompson Student Services Building, room 101). The instructor will make those accommodations that are requested in writing by the aforementioned office.

- **Academic Success Services:** Your student fees cover usage of the Math Center (784-4433) or [www.unr.edu/mathcenter/](http://www.unr.edu/mathcenter/), Tutoring Center (784-6801 or [www.unr.edu/tutoring/](http://www.unr.edu/tutoring/)), and University Writing Center (784-6030 or [www.unr.edu/writing_center](http://www.unr.edu/writing_center)). These centers support your classroom learning; it is your responsibility to take advantage of their services. Keep in mind that seeking help outside of class is the sign of a responsible and successful student.

- **Academic Dishonesty:** “Cheating, plagiarism or otherwise obtaining grades under false pretenses” constitute academic dishonesty according to the code of this university. Academic dishonesty will not be tolerated and penalties can include canceling a student's enrollment without a grade giving an F for the course of for the assignment. For more details, see the UNR General Catalog.

- **Audio or Video Recordings:** Surreptitious or covert video-taping of class or unauthorized audio recording of class is prohibited by law and by Board of Regents policy. This class may be videotaped or audio recorded only with the written permission of the instructor. In order to accommodate students with disabilities, some students may have been given permission to record class lectures and discussions. Therefore, students should understand that their comments during class may be recorded.

### Course Requirements

**Required Text:**
There is no required text for this course. A packet of reading will be available through electronic reserves (Ares). You will be expected to have completed all assigned readings prior to the class session. Assigned readings can be found in the Proposed Schedule of Classes (below).

**Assignments and associated points:**

1. **Evaluation of an assessment or intake form** (20 points)
2. **Case Study Assignment:**
   a. Evidence-informed synthesis of a problem or issue (30 points)
   b. Written case formulation (40 points)
3. **Problem-solving style response paper** (10 points)

Detailed guidelines and dates will be provided.
The following scale will be used to determine letter grades:

A  96% - 100%
A- 90% - 95%
B+ 87% - 89%
B  84% - 86%
B- 80% - 83%
C+ 77% - 79%
C  74% - 76%
C- 70% - 73%
F  69% or below
### Schedule of Classes Example

<table>
<thead>
<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>CLASS ACTIVITIES/READINGS / ASSIGNMENTS</th>
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</thead>
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| **Week 1**         | Course Overview & Rationale                    | In-class activity: *Assessing your problem-solving style* (Gambrill, 2006)  

*Note: Students will bring assessment instruments from field education placement, work, or other to class on 9/13*


In-class activity: Students evaluate a case based on one perspective

| **Week 3**         | Assessment in Agencies  
Professional Standards for Social Work  

Chapter 12: Contextual Assessment  
In-class activities:  
- Students evaluate a client case based on an assessment instrument they bring to class.  
- *Making Decisions about Intervention* (Gambrill)

| **Week 4**         | Gathering Information: Asking Questions  

Recommended Reading: Ridley & Kelly (2011), *Multicultural Considerations in Case Formulation*  
In-class Case Study activity

| **Week 5** (NASW Conference) | Students will look for instances of case formulation at the NASW conference presentations |  


Chapter 17: Where to Look: Deciding How to Gather Needed Information  
In-class Case Study

| **Week 6**         | Gathering Information: Screening & other instruments  
Consulting with professionals from other disciplines  
Consulting research  

Chapter 20: Putting it all together

| **Week 7**         | From Assessment to Planning: Weighing and Integrating the Assessment Information |  


Chapter 20: Putting it all together
<table>
<thead>
<tr>
<th>Week</th>
<th>Discussion of reading</th>
<th>In-class Case Study activity</th>
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<tbody>
<tr>
<td>Week 8</td>
<td>Interdisciplinary Guest speakers</td>
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<tr>
<td>Week 9</td>
<td><strong>Nevada Day—No Class</strong></td>
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<tr>
<td>Week 10</td>
<td><strong>(CSWE Conference)</strong></td>
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<td>Week 11</td>
<td>Interdisciplinary Guest speakers</td>
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<td>Week 12</td>
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<td>Week 13</td>
<td>Case Study</td>
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<td>Week 14</td>
<td><strong>Family Day—No Class</strong></td>
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<td>Week 15</td>
<td>Case Study</td>
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<td>Week 16</td>
<td>Final Class <strong>TBA</strong></td>
<td>Wrap-up</td>
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