

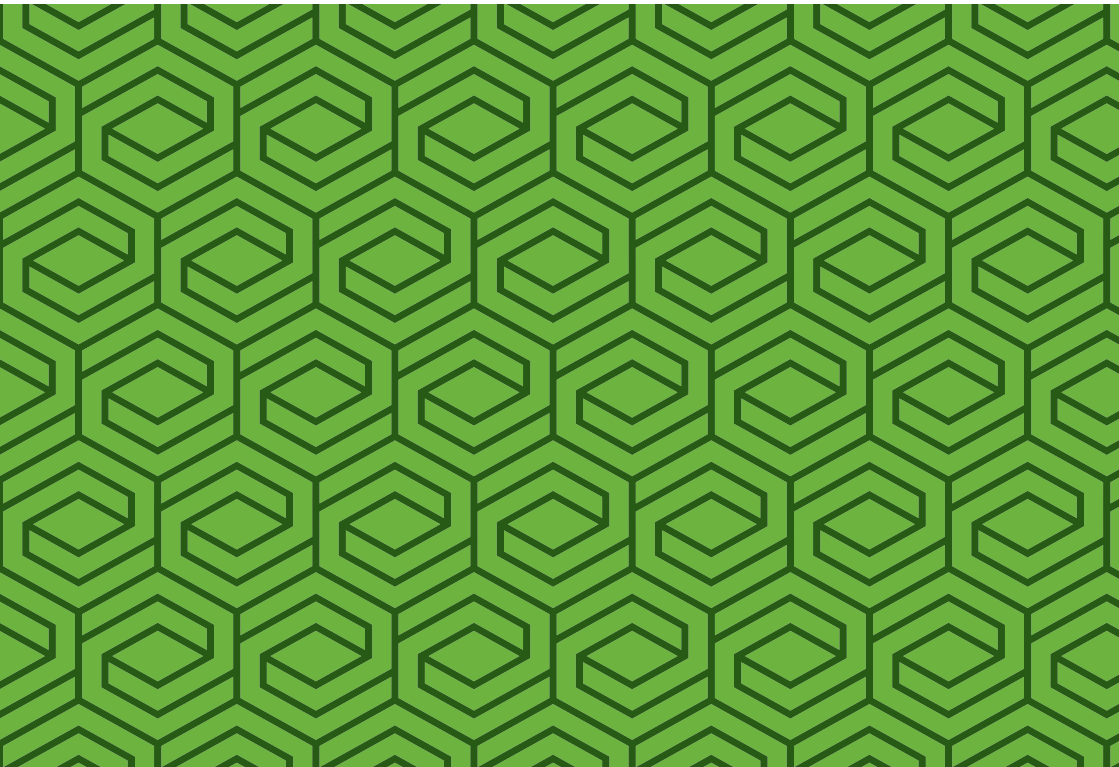


COL·LEGI OFICIAL
DE TREBALL SOCIAL
DE CATALUNYA

www.tscat.cat

Recommendations of the Association for drafting and presenting Social Reports

M. Teresa Massons Rabassa, Anna Mata Romeu,
Juan Manuel Rivera Puerto



Recommendations of the Association for drafting and presenting Social Reports



COL·LEGI OFICIAL
DE TREBALL SOCIAL
DE CATALUNYA

Drafting committee:

M. Teresa Massons Rabassa,
Anna Mata Romeu,
Juan Manuel Rivera Puerto

December 2018

In accordance with its Articles of Association, the Association must ensure that the following objectives are reached:

- To organise the practice of the profession in all forms and means in line with the applicable legal framework.
- To ensure that the professional activity of our members meets the interests and needs of society and fulfils the general functions of social work.
- To ensure adherence to the best practices and ethical obligations in the profession of social work.

Accordingly, and since it has been observed that social reports do not always have suitable content and structure, the Association has drawn up this document to ensure all members take it into consideration in the practice of the profession.

For various reasons, social work shares tools and knowledge with other professions, although what distinguishes us and makes us specific as a profession is the object of intervention and the way we approach it. In this respect, the social

report is a fundamental tool for social work and, in the same manner as the interview and other methodological and intervention tools, it is not exclusive to our profession. The preferred field of intervention of social work is the welfare system and, more specifically, its implementation and definition in the system of social services, which is often understood in a restricted sense although it is superimposed with other systems, such as healthcare, justice, education and others where, despite not being the central theme, social work still plays a significant role.

It is a documentary instrument that sets out a summarised description of a social situation, gives an assessment of it along with a proposal for intervention. It constitutes a technical report that may have many repercussions in the lives of individuals; hence, it is important for it to be drawn up carefully.

Those of us in the field of social work consider the report in terms of its usefulness since it makes it possible to systematically establish what we want to say, structure it and set out the information we wish to portray in a clear, organised manner.

Nevertheless, when drafting a report, benefitting from excellent handling of information (beforehand), appropriate use of professional language and issues linked to ethics and professional secrecy all take on an important role.

A social report may be drawn up at the initiative of the professional, when demanded by another service, based on a legal obligation or due to the protocol of the service or institution responsible for undertaking the professional function. It may also be prepared based on an ethical obligation, to report a crime, owing to a legal requirement, based on cooperation between institutions or due to the interest or demand of the users.

In certain field of intervention, specifications apply to the social reports issued. The basic specifications those reports must meet and the basic areas of content they should contain are set out here. Even so, this document shall be updated, attaching a file for each of the specifications in the social report according to the field of intervention (child protection, expert reports, disabilities, housing, and so on).

Drawing up accurate, thorough reports is highly important because:

- 1** A social report may substantially change the life of an individual and their family.
- 2** An unsuitable, poorly compiled or inadequately drafted report may adversely affect the life of the individual involved and other members in their family group or community.
- 3** A social report that fails to adhere to appropriate content, structure and language is a document that adversely affects the professional who drafted it and the whole group of professionals, since it is through the report that our form of professionalism is conveyed to an array of other professions and institutions. A poorly compiled report causes the profession to lose prestige as other colleagues' credibility diminishes.

Consequently, the drafting of social reports is a task that should be undertaken with great care, always stating the truth, citing sources that report facts, and it is essential to recall at all times that it is a document that is complicated to draw up and, as such, it is necessary to benefit from the time, skills and information needed to put one together.

It is also necessary to point out that in the international sphere the drafting of reports by social workers lacking sufficient thoroughness is reason for concern. This is an issue that repeats itself in professional literature.



The social report is a document centring on social aspects and it offers a description/assessment taking into account specific circumstances. One highly important aspect to take into consideration when drafting a report is that it is necessary to coordinate the needs of the subject with the resources available.

In 1985, the Spanish General Council for Social Work (CGTS) defined it thus: "An explanatory summary relating to a specific situation, issued by a social worker as a result of a study and assessment in order to draw up a set of specific goals."

In terms of content, it is necessary to distinguish three points in the use, handling and conveyance of information:

- 1** Description: social data based on facts and observations.
- 2** Professional interpretation of the data.
- 3** Reflection on the implications the report may have on the user; the social intervention being carried out; the decisions other institutions may make as a result of the report and the consequences thereof.

Ethical principles

When compiling social reports, the ethical principles of social work should always be present. When putting together reports, these principles are:

- 1 Honesty:** reports must include verified, objective data. It is important to distinguish and demonstrate whether the knowledge has been gleaned directly or may be verified, or whether it is known owing to information provided by third parties.
- 2 Respect:** it is necessary to always bear in mind the dignity and value of every individual.
- 3 Definition:** it is necessary to only ask and enquire about what is needed in order to draw up a specific plan to help the individual.
- 4 Clarity:** it is necessary to clearly explain the possibilities for using resources and the consequences of the user's decisions.
- 5** Respect and consideration should always be maintained in order to encourage cooperation from the user.

It is highly advisable to review the social report with the user because in many cases the latter is the genuine owner of the content of the report and, moreover, this will enable us to discuss concepts and viewpoints with them, demonstrating that the professional understands what he is being told and can move forward in the intervention process.

Except in cases where a crime or dereliction of duty is to be reported, sharing the social report with the user affords the professional with peace of mind, it creates professional coherence and helps to accurately define the professional role. It also makes it possible to bring about changes and forge an environment of trust with the use.

Characteristics of a good report

- 1** Conciseness. Set out only what is deemed relevant out of respect for the individual. Concise drafting avoids long paragraphs that can tire the reader of the report and make it difficult to understand.
- 2** Clarity and simplicity. Carefully select the words and build sentences without subordinates. If possible, maintain a subject-verb-predicate structure.
- 3** Usefulness. When drafting, always bear in mind the goal of the report. Avoid including irrelevant information, even if it is interesting.

Types of report



Social reports may be compiled in order to:

- Access a specific programme/project or resource.
- Access specialised services.
- Report a situation of risk identified.
- Request allowances/grants from within or outside the relevant institution.
- Conduct monitoring and make informative communications.
- Carry out referrals/coordination between various institutions or services.
- Advise another institution with a decision (or judgment, in the case of the administration of justice).

There is no single uniform structure for social reports. Nevertheless, there is broad consensus in the professional and academic spheres about the various sections it should incorporate.

Generally speaking, we are referring to: an introduction (to establish the author, the intended addressee and the subject of the report); a section specifying the sources of information and the professional methodology applied to draw up the report; a section describing the personal and social situation; a section assessing the situation, indicating a plan for intervention (if applicable) and a forecast; and a final section giving an assessment/proposal.

Even so, it may be useful to structure it into blocks to make the process of drafting easier and to make it easier to read.

Accordingly, the **first block** should include:

- The institution and professional issuing the report.
- The date and place.
- The reason for the report.
- The source of the demand for the report or the addressee.
- Data to identify the individual referred to. The subject of the report (forename and names, date of birth, age, place of birth, address and nationality).
- The details of the coexistence unit. A genogram. Relationship with the subject. Name, age, occupation, school, unemployment, etc.

The **second block** should include the sources consulted, the channels through which information was obtained, the methodology applied, the time for which the case has been known to the institution or the research/study/diagnosis period, and the other teams or institutions that have intervened or with which we have coordinated in order to draw up the social report.

The **third block** should include a brief description of the vital background of the subject and the current situation. It may include the following sections (although not all of them need to appear in every report):

- Health situation
- Socio-economic and employment situation
- Socio-cultural situation
- Educational and training situation
- Family dynamic (nuclear and extended family)
- Social relations
- Leisure and free time
- Housing details and area of residence
- Psychological/emotional state
- Use of social, sporting, healthcare and other services.

Lastly, the **fourth block** would serve to close the social report. It should include the following elements:

- A professional assessment of the problem or needs described in the previous block.
- A capacity to solve problems, strengths in personality, vulnerabilities. An analysis in terms of the individual's strengths and weaknesses.
- A self-assessment of the situation by the subject. The degree to which the subject accepts the circumstances giving rise to the report. Do they agree and accept the professional's proposals? Or do they reject them?

- Forecast(s) (scenarios) for the development of the situation described and an assessment of the potential consequences of one or other option, decision or intervention.
- Indications regarding the working plan being implemented with respect to the subject and items assessing this work.
- Internal and external resources being received at the coexistence unit.
- Final conclusion.

Important observation: the perspective expressed must always reflect the profession of social work. For instance, if a report is compiled on a young person at risk of exclusion or involved in problems with the legal system, it is necessary to ascertain that the version of the prosecutor and the version of the lawyer for the defence will not match. The perspective of the social work body should never side with that of the lawyer for the defence or the prosecution. Social work shall consider the outlook of the subject regarding the crime and the social consequences of one or other decision.

Drafting process

Preparation

- 1** Prior to beginning drafting a report, it is important to ensure the professional has sufficient information.
- 2** It is necessary to have a suitable place and time and the tools required (paper, pen and computer).
- 3** First a draft should be drawn up with relevant data and then organise them. The information covered in the diagnosis may be useful.
- 4** The basic premises with regard to the approach should be established.
- 5** It is necessary to recall the purpose and the addressees. Often, reports are addressed to professionals who do not work in the field of social work; therefore, it is necessary to consider the addressee and what information is relevant, what they will need to know and, if the professional is not from the social services, it is necessary to avoid words that are part of the professional jargon from the field, as well as abbreviations and acronyms. If the text is difficult to understand, this will adversely affect the subject of the report.
- 6** It is necessary to consider who may read the report: doctors, judges, service directors and users (who may have little knowledge or need special support to understand it), the family, lawyers, etc. A report can always be questioned.

- 7** The header must be clear. It should include the reason for the report, the addressee and present the subject including their name, age and address. With regard to the family, references should always be made in relation to the subject of the report (for instance, if the subject is a child with a father and mother, it is not possible to talk about the father and then the mother as the father's wife).
- 8** It is necessary to organise the various sections clearly in a relevant manner.
- 9** A report is more than a description of events, it must include an analysis of events and be able to understand what they mean and explain this.

Drafting advice

- 1** The drafting must be clear and concise, mentioning what is relevant and, where possible, avoiding the use of subordinate and long sentences. Sentences should be between 15 and 20 words because if they are too long, the text becomes difficult to understand. It is better to use a full stop and start a new sentence.
- 2** A report is a formal document and verbal colloquial language should be avoided.
- 3** All adults referred to in the report should be addressed in a respectful manner (Mr or Ms, followed by the surname). With regard to children, the name shall suffice, but in certain cases the surname should be added.
- 4** The content may vary depending on the purpose and the intended recipient of the report.
- 5** It is important to make the distinction between proven facts, known by professionals, or those known due to being told. The source of information should be quoted.
- 6** All necessary aspects should be written down, avoiding all aspects that are not important to the case. Superfluous descriptions and re-

marks need not be made. In short: do not write too much or too little. It is important to be accurate with terminology and the drafting should be methodical and organised; it should express what is essential, avoid being vague and be sparing with terms.

- 7** The reasoning must be didactic (cause and effect).
- 8** The goal of the report should be focussed on.
- 9** Positive forms of expression should be used and, if possible, avoid negative and, in particular, subjective valuations. It is necessary to focus more on the subject's strengths than their weaknesses, without meaning vulnerabilities should be ignored or downplayed.
- 10** Often it is necessary to make a future forecast to envisage what may happen in a social situation based on the indicators identified. We should recall that it is necessary to clearly point out the variables we have identified and become acquainted with and which form the basis for issuing the report.
- 11** If appropriate, thesauruses may be used in the drafting. The institution style guide should be consulted, if any.
- 12** It would also be beneficial to have social work report models.
- 13** A professional recommendation should be given in the conclusion.



Completion/review

- 1** It is necessary to carefully re-read what has been written and go over it with a computer programme to check the spelling. The report should be re-read in order to look for possible errors after using the spell-check. Make sure what is meant to be said is understood.
- 2** It is necessary to include a "header" and a "footer". The header may include the word 'confidential' and the footer may include the page number.
- 3** The report should preferably be signed using the name and associate number of the member, although other methods may be considered in order to preserve the identity of the professional wherever the revelation thereof may pose a risk.

Along these lines, it is pertinent to be familiar with the content regulated in article 18 (section 5) of Decree 27/2003, of 21 January, on primary social care, relating to the possibility of using a code to substitute personal information about the professional: "As a measure to protect social service professionals intervening on the various administrative procedures arising from the provision of primary care social services, the local body may assign a code to identify each of the professionals in this category which will replace their personal data on their reports for diagnosis or in other actions they perform in person which are needed in order to draw up said reports".

- 4** It may be useful to have a colleague read the report in order to make sure it can be clearly understood before handing it in.
- 5** If the report is enclosed with one from other professionals (i.e., from psychologists or doctors), it is advisable for the service manager or director to be made aware and for it to be processed in the name of the service. However, the processing shall be limited to the joint submission and it should be clear, without leading to confusion, who is in charge of the content of each report.

Final considerations

- We need to be aware that the social report may be subject to use for partisan purposes. We may even be sued by a user or representative thereof (i.e., a lawyer) for financial gain. This situation should be very rare; however, if it does take place and the lawsuit is admitted, it is necessary to recall the ethical principles, particularly honesty in relation to data, and also the fact that the purpose of social work is not to defend a user, regardless of the circumstances. Our goal is always for the decision made as a result of the report to be fair, meaning that highly objective considerations need to be made. Failing to uphold these parameters may entail a breach of the professional code of conduct and be detrimental to the suitable perspective society has of the role, function and thoroughness that are characteristic of our profession.
- Behind a good report lies an excellent professional, one who takes great care when obtaining, comparing and using the information received from a user. Often, the report enables us to engage in a good process of accompanying a user or family group.
- The social report also provides us with the opportunity to portray our great professionalism to the intended recipient.

Bibliographical references that may be useful

Aguilar Idáñez, M. J. (2013). *Trabajo Social. Concepto y metodología*. Madrid: Paraninfo.

California University. *The Social Assessment Report*. Retrieved: 15 December 2018 from <http://www.csub.edu/~rmejia3/The%20Social%20Assessment%20Report.ppt>

Del Caño, C., Escoda, E., Herraiz, A., Poyatos, A. and Rejas, L. (2012). *El Social report: teoría y práctica*. Valencia: Tirant Humanidades.

Dunlap, K. (1997). *Write On! Practical Suggestions for Preparing Social Work Records*. *The New Social Worker*, 4(4). Retrieved: 15 December 2018 from https://www.socialworker.com/feature-articles/practice/Write_On%21_Practical_Suggestions_for_Preparing_Social_Work_Records/

Fernández, A. M. and Jiménez, A. M. (2006). *El Informe Social. Cuestiones a debate*. Malaga: Official Association of Diploma holders in Social Work and Social Carers of Malaga.

Fernández Ges, C. (2005). *Guia i protocols d'informes socials*. Barcelona: Barcelona Provincial Council; Social Welfare Department

Fernández, T. and Ponce, L. (2012). *Trabajo social individualizado. Metodología de intervención*. Madrid: UNED; Ediciones Académicas.

Guinot, C. (coord.) (2009). *Métodos, técnicas y documentos utilizados en trabajo social*. Bilbao: University of Deusto.

Kent, S. (2015). *10 Top Tips for Successful Report Writing*. Locum Today, 10 December. Retrieved: 15 December 2018 from <http://www.locumtoday.co.uk/article.php?s=2015-12-10-10-top-tips-for-successful-report-writing#.XBgiu2M8aCg>

Pati, A. (2010). *How to Write a Good Report*. Community Care. Retrieved: 15 December 2018 from <https://www.communitycare.co.uk/2010/07/28/how-to-write-a-good-report/>

South Australia University. *Social Work: writing a report for placement*. Retrieved: 15 December 2018 from https://lo.unisa.edu.au/pluginfile.php/511336/mod_resource/content/2/Social%20Work%20-%20report%20writing%20for%20placement%20April%202016.pdf



COL·LEGI OFICIAL
DE TREBALL SOCIAL
DE CATALUNYA

www.tscat.cat

