Process Recording/Journal

It is expected that student Process Recordings/Journals will be used in field supervision, with either written or verbal feedback provided by the Field Instructor. Process recordings/Journals are an effective way of learning interviewing skills and reflecting on one’s practice. All students in field placement are required to become familiar with recording the process of interaction with clients and client systems. In a direct practice/clinical setting, this takes the form of a Process Recording; in a Community Practice, Policy, and Advocacy setting, or in work with larger client systems such as task groups, organizations, or communities, this takes the form of a Journal. Depending on students’ field setting and assignments, successive process recordings/journals may focus on on-going work with one client/client system. Also depending on the field setting, in the first semester there may be a period of time necessary for students to acclimate themselves to the agency and begin work with clients, before completing a full Process Recording/Journal.

Students are expected to complete 3 process recordings/journals per semester, on the dates indicated for each assignment. All Process Recordings/Journals must be signed by the Field Instructor in order to be considered complete. Field Instructor comments may be included in submitted Process Recordings/Journals, but are not required. While the exact submission date and/or content of student Process Recordings/Journals may vary based on the timing and types of assignments provided, it is expected that these assignments will be completed and submitted according to the due dates listed below. If a student anticipates a delay in timely submission of an assignment, they are expected to notify their Field Liaison in advance of the due date to make arrangements for an alternate submission date. Dates for submission of Process Recordings/Journals for the Spring Semester are provided below. Delay in process recording/journal submission may impact the final grade for the course.

Summer Session:
Process recording/Journal #1 Due week of June 27, 2016

Fall Semester:
Process recording/Journal #1 Due week 4 –September 23, 2016
Process recording/Journal #2 Due week 8 –October 21, 2016
Process recording/Journal #3 Due week 12 –November 18, 2016

Spring Semester:
Process recording/Journal #4 Due week 4 –January 27, 2017
Process recording/Journal #5 Due week 8 –February 24, 2017
Process recording/Journal #6 Due week 12 –March 31, 2017
INFORMATION THAT SHOULD GO INTO PROCESS RECORDING

There are various formats for completing a process recording. The following outline covers the major areas to include within a process recording. Students may use either the “column” format template (as shown in the “sample” that follows), or a narrative format (description of the interview/contact content and student’s observation/thoughts/feelings in paragraph form) for completing a process recording. All content areas below must be included when using either format. Field Instructor comments can be added to any of the sections of the recording.

1. **Identifying information.** Include student’s name, date of interview/contact, and date of submission to the field instructor. Identify the client (disguise or remove client name to protect confidentiality in submission to Field Liaison.) Include the number of times this client has been seen (i.e., "Fourth contact with Mrs. S."). If client is seen in location other than the agency, state the **general** location where client was seen.

2. **“Tuning In”.** This is the preparation phase of an interview/contact with client. Anticipate the client’s thoughts, feelings, issues, as they enter the interview. Also consider your own thoughts and feelings as you anticipate this interview.

3. **Purpose and goal for the interview/contact.** Brief statement of the purpose of the interaction and if there are any specific goals to be achieved, the nature of the presenting issues and/or referral.

**Column or Narrative format:**

a. **Content.** A description of what happened, as close to actual dialogue as the student can recall, should be completed. This section does not have to include a full session of dialogue but should include a portion of dialogue. The field instructor and student should discuss what portions should be included in the verbatim dialogue.

b. **Reflection and feelings.** The student’s feelings and reactions to the client and to the interview. This requires the student to put into writing unspoken thoughts and reactions s/he had during the interview e.g. "I was feeling angry at what the client was saying, not sure why I was reacting this way...”

c. **Observation/Analysis.** Thoughts about what has happened during the interview (e.g., *Why is he acting this way?*) and/or identification of skills or theoretical/frameworks used. (e.g. “I used the strengths perspective “ ; “I used the skill of partializing.”)

d. **Field Instructor’s Comments.**

4. **A summary of the student’s impressions.** This is a summary of the student's analytical thinking about the entire interview/contact and/or any specific interaction about which the student is unsure. What did you learn from this interview? Are there any patterns in your practice emerging more distinctly?
5. **Future plans/Next steps.** Identify any unfinished business and/or any short/long term goals. Given all of the above, what are you planning to do next time with the client? Are there things that need to be researched, learned, or considered, prior to the next interview? Is your overall purpose still appropriate?

6. **Identify questions for supervision.** Include any client action or non-verbal activity that the student may want to discuss.

7. **Reflection on supervisory discussion with Field Instructor.** Following supervision, discuss what you have learned about your practice, and the competencies and/or practice behaviors relevant to your learning.
Sample Process Recording

<table>
<thead>
<tr>
<th>Content Dialogue</th>
<th>Reflection &amp; Feelings</th>
<th>Observation/Analysis</th>
<th>Field Instructor Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record word for word (to the best of your ability) what happened during the selected segment of the interview, including both verbal and nonverbal communication. Be certain to include third-person participants, interruptions, and other occurrences that were not part of the planned session/interview with the client.</td>
<td>The student's feelings and reactions to the client and to the interview as it takes place. This requires putting into writing unspoken thoughts and reactions as the interview is going on. Do not use this column to analyze the client's reactions — use it to identify and look at your feelings</td>
<td>This column can be used to analyze one's own interviewing techniques and to suggest alternate approaches that might have been more effective; or, one's observations and thoughts regarding what has been happening during the interview. E.g., in the course of carrying out the interview, the student is thinking: “I wonder what he really meant by that statement? That seems to contradict what he told me earlier.”</td>
<td>In this column, the supervisor can make remarks right opposite the interaction, feeling level, or observations that have been recorded</td>
</tr>
</tbody>
</table>

Sample Content:

This is a student’s third or fourth visit with a woman who is hospitalized with a life-threatening illness.*


<table>
<thead>
<tr>
<th>Content Dialogue</th>
<th>Reflection &amp; Feelings</th>
<th>Observation/Analysis</th>
<th>Field Instructor Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker(W): (Knocking on closed door, then waling into room, smiling) Hello, S_____</td>
<td>That must have been on her mind for a while.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client (C): (smiling) Hi. You’ve talked to B____ (patient’s husband) didn’t you? (begins to laugh)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
W: Yes I have...Why are you laughing? (smiling, taking chair and placing it near the bed)

C: Well, I called him up once on Sunday, and then when I called him back later, he sounded different (smiling)

W: (puzzled look on face) Different?

C: The second time I called, he started asking questions like, “Why do you think she wants to talk to me?” and “What should I say?” (she begins to laugh) Boy, he’s gonna give you a hard time.

W: Well, I explained to him that I would like to meet him and maybe he would like to discuss any concerns he may have regarding your hospital stay, etc. I explained to him that I would meet and speak with him alone, and then we could set up a time when we could all meet together for a discussion.

C: (smiling) Well, I hope you can get him to come in!

W: Your husband explained to me that Tuesday, around 7 pm would be a good time for him to come in, after he gets home from work.

It's like a challenge to her, I suppose
C: If he comes in and talks to you it’ll be something else! You see, the psychologist never talked to him on the phone directly; he used to tell me to talk with my husband, but then my husband won’t come. I swear, Bob’s so funny. He says, “I’m gonna tell her that you used to drink a lot.” But I told him that you already know that, and a lot more. I told him that I tell the doctors and others about my drinking because, now the doctors says that that information was helpful in running tests on me, and stuff like that. I told Bob that I tell the truth about me, all he has to do is tell the truth about himself (pause).

His problem is that he keeps bringing up old news: he keeps bringing up things that happened a long time ago. Like, one time before we were married, he saw me with a guy, and even now he says things like, “Remember when you were going out with me, and then I saw you going out with someone else?” And we weren’t even married yet! And then the other day he was talking about how my son was caught with two other boys for truancy. Anyway, The other two boys have been in the youth detention facility a lot, and my son doesn’t have a criminal record, so they let him go. But that happened when I first got sick, and the man came to talk to me about it when I was getting ready to take the ambulance to the hospital. So my husband keeps saying that I tried to hide this from him, but I just had

| **Maybe her husband just needed someone to say they were going to listen to what he had to say.** |

She changed the subject. Perhaps she and her son do keep information from her husband. There are two sides to every story!

| **Do you get the impression she’s scaring him off?** |

YES! Did you think of this at the time?

Was she surprised her husband agreed to come?
other things on my mind and I tried to tell my husband (now picking and scratching arm, around IV site).
The doctors came in this morning. (She had been smiling while previously talking, but stopped smiling when last statement was being said.)

W: It seems to me that their visit was upsetting to you...(pause).

Attempting to interpret her change in facial expression. The IV seems to be a constant reminder of the reality of being in the hospital.

What would her husband do? Would he be physically abusive? Interpretation or questioning needed

You still pick up nonverbal cues — nice.

Good use of interpretation
A process recording can also be used when a student is co-facilitating/facilitating any type of group. The process recording should include information regarding dialogue and non-verbal behaviors engaged in by specific members of the group. Group dialogue should show group interaction, to the extent possible, to show an understanding of process, and/or to review with field instructor on group dynamics.

The Group Process Recording should also begin with the sections, as noted for the individual client process recording:

1. Identifying information. Include date of group meeting, and date of submission to the field instructor. Identify the approximate number of group members and the number of times it has met, as well as the location of the meeting.

2. “Tuning In”. This is the student’s preparation phase for a group meeting. Anticipate the group issues, as the group begins. Also consider your own thoughts and feelings as you anticipate this group session.

3. Purpose and goal for the group, overall, as well as for this session.

Either the column or the narrative format can also be used for process recordings of groups. The “Observation/Analysis” portion can include student commentary on:

1. Dynamics of the group (i.e., rather than only on the content of what is said). For example, if this is the first process recording for a particular group, consider the following questions. What group rules emerge? What leader behaviors are displayed? How are decisions made? How active is the facilitator(s)?

2. Climate/group atmosphere: For example, how are feelings (as opposed to points of view) dealt with? Were issues dealt with and how were they dealt with? How is difference and diversity dealt with in the group? What non-verbal behavior indicates changes in the climate? Discuss the roles of various group members and how they influenced the climate of the group.

3. Facilitation: What group dynamics are observed; what group building behaviors (bringing in silent members, harmonizing conflict, reinforcing participation, etc.) is student engaged in?

4. Communication patterns creating barriers or obstacles to the group process.
Sample Group Process Recording

(This is a segment of a beginning student recording of a group of patients hospitalized with tuberculosis. The group is slow in getting started and the recording illustrates the difficulty that the student had with this.)*


<table>
<thead>
<tr>
<th>Group process</th>
<th>Reflections &amp; Feelings</th>
<th>Observation/Analysis</th>
<th>Supervisory Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>I walked in and patients were coming in. As they came in I assured myself of their names and wrote them down so as not to forget.</td>
<td></td>
<td></td>
<td>Good.</td>
</tr>
<tr>
<td>I introduced myself and said that we were going to make this a time for patients to deal with anything they wanted to “let their hair down on” and ask for approval.</td>
<td></td>
<td></td>
<td>Nice way of putting it, however the second part of your sentence is very confusing!</td>
</tr>
<tr>
<td>Got zero responses</td>
<td>I said to myself, “OH! OH!”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I looked around and said, “We’ve gotten together here because you all have something in common.”</td>
<td>Thank goodness!</td>
<td></td>
<td>Hooray – a response!</td>
</tr>
<tr>
<td>(a few moments of silence)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Then Mrs. A. said, “We all have the same disease.”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I said, “Yes, you all have active TB.”</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mrs. A. said, “Yes, I agree.”</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The other patients nodded.

I asked, “What does it feel like to have TB?”

Mr. A. said, “I try not to think about it.”

I said, “Is it more comfortable for you that way?”

He said, “Yes, I know I have it and they are treating me for it so why think about it?”

I said, “How was it with you?” I directed myself toward Mrs. B. She said, “I was shocked but I have to accept.” I said, I think I would have that feeling too.”

Mrs. A said, “I was surprised too but once I was told I wasn’t going to have to go to the TB sanitarium, I was OK.

I turned to Mr. C and asked “How is it for you?”

He said nothing – so I changed the subject.

| I realized she was dealing on a different level | What am I dealing with? | What does “going to the TB sanitarium” mean? | Resistance? |
| Good exploration. | Another response would have been to ask “Why?” or use reflection: “Try not to think about it?” | | |
| I said, “One thing we have heard other patients talk about is the feeling of isolation. Has it been this way with you?” | I felt good that I could zero in on that. | Ah! Big clue – they don’t know each other, but I really cannot introduce them to each other now – I goofed! |
| Mrs. D. said, “Well I am working on a recipe book I have never had time to work on and I watch TV or do some sewing.” | | You could have still made the introductions by making some kind of comment about, “Hey – I just realized that not everybody knows everybody – let’s pause for introductions.” |
| I said, “It sounds like you have been able to mobilize your energies into fighting that feeling.” | | |
| Mrs. D. said, “Definitely.” | | |
| Mrs. A. said, “I read a lot.” | | |
| Mr. A. said, “I can’t stand it.” | | |
| I asked, “What do you do?” | | |
| Mr. A. said, “Well I get out and walk around.” | | |
| Mrs. A. said, “That’s for sure – he’s the only person I always see around.” | | |
Mr. E. was hiding his head in his hands and squirming in his chair. I sensed a great deal of forlornness. I felt he really should be here, but I still pressed to see if he would open up.

I said, “I seem to be hearing from you that you don’t know each other.” Mrs. D. said, “I had never seen anyone that’s here before today.”

So, I apologized for not introducing them.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>You were right!</td>
<td>Did you go ahead and have introductions here? This gave you a perfect opening.</td>
<td></td>
</tr>
</tbody>
</table>
Journal recording can be used to reflect on work with larger client systems and/or on a longer-term a Community Practice, Policy, and Advocacy assignment, and to show steps that are being taken to complete the assignment. It is an educational tool for both the student and Field Instructor to use with specific learning goals in mind. The purpose is for the student to be able to recall the contact, report detail, comment on his/her activities, review the work done, and plan for future activity. Field instructors’ comments can be included following each of the sections below near the related discussion, or at the end of the recording, and can highlight intervention and assessment skills, as well as the skills for monitoring and critiquing one’s work.

Journal Recording Template

Student Name: ________________________________________________________________

Project/Assignment: (Explanation of the assignment/project and its purpose. Identify the need that the assignment/project will be meeting for the agency/community and the goal of the project.)

Date of interview, meeting, activity, event, project, etc.: ____________________________

Objectives of interview, meeting, activity, event, project, etc.: ___________________________________________________________

Description of interview, meeting, activity, event, project, etc.: ___________________________________________________________

Chronology of events:

Specific details of interaction: Include group dynamics, tactics and strategies; some dialogue (verbatim) to illustrate group process; include observations, feelings and analytical thoughts about what was happening, challenges/Obstacles, issues that hinder the accomplishment of the group’s task?

Self Assessment: (Include questions, uncertainties; evaluation of practice and observations about how tasks might have been done differently)

Future Plans: (What possible next steps are recommended? What changes or plans might be required? How might this project or similar projects be adjusted going forward?)

Agenda for Supervision:

Reflection on supervisory discussion with Field Instructor. Following supervision, discuss what you have learned about your practice and the competencies and/or practice behaviors relevant to your learning.
Journal Recording - Example

Journal recording can be used to reflect on work with larger client systems and/or on a longer-term a Community Practice, Policy, and Advocacy assignment, and to show steps that are being taken to complete the assignment. It is an educational tool for both the student and Field Instructor to use with specific learning goals in mind. The purpose is for the student to be able to recall the contact, report detail, comment on their activities, review the work done, and plan for future activity. Field instructors’ comments can be included in the margins near the related discussion, or at the end of the recording, and can highlight intervention and assessment skills, as well as the skills for monitoring and critiquing one’s work.

<table>
<thead>
<tr>
<th>Student Name:</th>
<th>Field Instructor Signature</th>
</tr>
</thead>
</table>

**Project/Assignment:** (Explanation of the assignment/project and its purpose. Identify the need that the assignment/project will be meeting for the agency/community and the goal of the project.)

In an attempt to engage (program name) participants on a deeper level of planning and visioning for the agency, and in order to encourage the building and strengthening of leadership in program graduates as ambassadors for (agency name) programming, I am attempting to reconvene and improve the (community board name), which has been inactive since the Spring of this year. This activity will help to satisfy Goals #1, 3, 5, 6, & 7.

**Date of interview, meeting, activity, event, project, etc.:** __________, 20__

**Objectives of interview, meeting, activity, event, project, etc.:**

In my initial meeting with three former (community board name) members and program participants, I hoped to get better acquainted with the participants as individuals, to understand what activities they contributed to as board members, understand the recruitment and screening process to fill all seats on the board, discuss appropriate meeting times, days, frequency, and incentives for participation. I also wanted to learn about what aspects of the board seemed to work well and what had caused the lapse in activity over the past year.

**Description of interview, meeting, activity, event, project, etc.:**

On Monday afternoon, I sat down with three (program name) graduates who are all active volunteers at the agency and were also former members of the (community board name), “M”, “D”, and “S”. In the hour long meeting, together we discussed previous board activities, their thoughts on why the board was or was not an effective administrative strategy in the past, what members gained from participation in board meetings, what types of informational resources or trainings should be offered to potential board members during the recruitment process, and what role (program name) staff would play in the board meetings.

**Chronology of events:**

After reviewing (community board name) records from earlier this year and last year during its peak activity, I developed an agenda for items to address in my discussion with “M”, “D”, and “S”. We scheduled a time to sit down and talk on a day all three participants would be volunteering at the agency. As we were all somewhat familiar with each other, we skipped introductions. I explained that resuming (community board name) activity would be a project I was undertaking as part of my internship and that I would like to set things up so that the transition to a new staff liaison would be smooth when my time at (program name) ends this April. I then presented a few ideas, to which the participants responded, and then opened the floor for more input. I took notes throughout, as did “D”, and will send out minutes recapping our discussion in an email to all attendees and in an email to all attendees and program directors at (program name) this coming week.
<table>
<thead>
<tr>
<th>Specific details of interaction: Include group dynamics, tactics and strategies; some dialogue (verbatim) to illustrate group process; include observations, feelings and analytical thoughts about what was happening, challenges/obstacles, issues that hinder the accomplishment of the group's task?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The three participants invited to the inquiry (community board name) meeting are long time (program name) regulars, program graduates, and volunteers. They were very well acquainted with one another, although my interactions with “D”, and “S” have been mostly in passing. “M” has attended several staff meetings and trainings and is around on almost a daily basis, so we knew each other a bit better. The meeting felt a little awkward and quiet at moments before we really got deep into discussion, which would have probably been different had I the opportunity to work and interact with “D”, and “S” more often in the past months. We discussed logistics of meetings and memberships, concluding that the (community board name) would be convened once a month on a set day and time for approximately 1.5 hours in the morning. A light breakfast spread would be provided to encourage participation. Additionally, members would receive two tokens for each meeting attended, and previously had received a $5 gift card for good, consecutive meeting attendance. We would collaboratively, with (program name) staff members, seek program graduates who were regarded as reliable, outgoing, and passionate about making change. We would invite approximately ten individuals to participate as (community board name) members for a six-month term, allowing time between terms for the mentoring of a member's successor. We then discussed what kind of atmosphere was important to maintain in the (community board name) meetings. “M” emphasized &quot;Anonymity in the meetings. What's said here stays here so nobody is talking behind somebody's back&quot;. “D” added that we should adapt a version of the regularly used &quot;community agreements&quot; to specifically suit the needs of the (community board name), and “S” concurred. We all agreed that some work would be required in advance to develop a (community board name) charter, in which we state the mission, vision, goals, and guiding principles of the (community board name), in order to give participants and staff a better understanding of what the (community board name) does and why, as well as to provide structure for the board, which will facilitate the transition between leaders and liaisons are positions inevitably turn over. I brought up the idea of (community board name) members serving as “ambassadors” of (program name) and its programming, and asked “M”, “D”, and “S” if they felt that they or other program graduates were equipped to fulfill this role. “S” suggested that we hold some kind of training for potential (community board name) members regarding &quot;messaging,&quot; so that everyone would understand each of the programs and be able to explain them to outsiders or potential consumers, “I mean, it's been awhile since I graduated my program. I could use a refresher. I don't always remember what all we do here”. “M”, “D”, and I all agreed this was a great idea and would help strengthen the sense of leadership we want members to develop through service to the (community board name) and their community. We also committed to the idea of setting ground rules about attendance, acceptable participation, and how to proceed with asking someone to step down from their (community board name) membership if necessary to prevent “problems when it does actually come up, which it will”. I then took down everyone’s phone numbers and email addresses to relay information about the about the next (community board name) preliminary meeting, which we hoped to convene in two weeks.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Self-Assessment: (Include questions, uncertainties; evaluation of practice and observations about how tasks might have been done differently)</th>
</tr>
</thead>
</table>
| I realized pretty immediately during this meeting, that despite “M”, “D”, and “S” being well acquainted with one another already, it would have been good practice to conduct a brief "introductions" and "how is everybody feeling?” go-around before diving into the issues. The participants had all just spent a long day volunteering at the agency and facilitating groups. Our meeting was at the end of the day, when everyone was inevitably tired and probably emotionally drained. It would have been beneficial to acknowledge this before diving head first into another serious topic of discussion. I also feel like I should have scheduled the meeting farther in advance instead of convening fairly suddenly, to give the participants more time to think about their past experiences with the (community board name). I don't know if they stayed later than usual just to be nice and accommodate me or if they truly had the time to give to the discussion. I should strive to be more sensitive to others’ time in the future and set a concrete beginning and ending time at least several days in advance out of consideration to the participants outside lives and responsibilities. I was also the first person to arrive in the room and arbitrarily
chose a seat around the large table. As “M”, “D”, and “S” came in, they all sat next to one another across from me, creating a feeling in the room like I was running the meeting and they were attending it. I didn’t notice the space between us right away, but when I did I was unsure if I should have moved closer or if that would only draw attention to the dynamic in a way that would make everyone feel more awkward. If I had held introductions at the group’s beginning, I could have better explained that this inquiry meeting was to gain the expertise of the participants, not the other way around. I also realized that the setting arrangement felt even more awkward because I was, by far, the youngest person in the room, and among the four of us, probably the one perceived as having the most social class advantage, especially due to my role as a Master’s level intern. I hope, in the future, I can find a way to acknowledge these differences in perceived status in a way that is productive to the group’s functioning and promotes an atmosphere of transparency and accountability.

**Future Plans:** (What possible next steps are recommended? What changes or plans might be required? How might this project or similar projects be adjusted going forward?)

I will compile the notes from this meeting and email them out to the meeting attendees, as well as the (program name) program directors, within the week. Then, during the agency’s Strategic Planning activities next week, I will lead a conversation among staff members concerning revamping the (community board name) and building participant leadership. During this conversation, I will discuss the idea of a “messaging training,” as brought up by “S”, developing a charter for the board, brainstorm with staff about participants to be considered for membership, and get feedback from those staff members who have previously served as liaisons to the board. I will then schedule the next (community board name) meeting with “M”, “D”, and “S” to begin work on the charter, draw up membership invitations, and draft fliers to be posted at the agency calling for suggestions and input.

**Agenda for Supervision:**

- Discuss results of initial (community board name) inquiry meeting
- Review Strategic Planning research for next week
  - Discuss visioning activities
  - In what parts of Strategic Planning week will interns participate?
  - What should be covered in staff discussion about (community board name)?
- Look over term paper logic model
- Begin brainstorming Spring semester project ideas