

## CDP SW ROLES CHECKLIST:

This checklist provides a summary of common roles of CDP SWers.

This checklist is *not* exhaustive—additional SW roles may be identified throughout the life of a case. This checklist is also *not* prescriptive—the following roles will not all be needed on every case.

This checklist is intended to assist with role definition and division of tasks once a SW referral has been made; it does *not* replace direct communication between collaborators. For more information on initiating a CDP SW referral, please see the Flags and Framework for CDP SW Referrals guidance.

### 1. ARRAIGNMENTS ADVOCACY

- Assist with client interviewing or atty/client communication at arraignment
- Gather information from existing programs/community groups already working with new clients
- Facilitate urgent connections to medical, mental health, or substance-use care (ex: referrals to detox, rehab, hospitals, programs, or Correctional Health Services)
  - Urgent connection to care at request of the person we represent, in community or jail
  - Connection to care as advocacy for release at arraignment or 170.70 or 180.80 day (beyond SRP)
- Off the record advocacy (e.g. conversation with judge, ADA, or program staff)
- On the record advocacy (e.g. participation in bail application)
- Remote support from SW Supervisor on-call nights and weekends

### 2. ORAL ADVOCACY

- Participate in bail application (at or after arraignment)
- Advocacy with a judge or treatment court staff on the record or at a conference
- Advocacy with an ADA: in court, on the phone, or in person at the DA's office
- Advocacy with program staff

### 3. PROGRAM CONSULTATION, REFERRAL, and ADVOCACY

- Provide client-requested information about programs or community resources to atty or client (i.e. provide information for non-case related resource connection)
- Meet with client to assess for program, treatment, or resource connection (i.e. conduct assessment for case related resource connection)
- Consult on program eligibility, fit, and availability for ATDs or ATIs
- Coordinate referrals to programming linked to legal case:
  - Program connection as advocacy for release
  - Program connection to advance plea negotiations
  - Program connection as alternative to incarceration
  - Program connection in lieu of court/TASC's recommendation
- Provide SW support throughout programming, including advocacy with program or re-referral
- Obtain program updates in advance of client court appearances (if SW case is still open for additional reasons beyond solely requesting court letters)

#### 4. MITIGATION INFORMATION GATHERING and WRITTEN MITIGATION

- Client interviews—conduct interviews of the person we represent, independently or jointly with atty
- Collateral interviews—conduct interviews of family members, loved ones, or community members of the person we represent; independently or jointly with attorney
- Records:
  - Request records needed for mitigation (medical records referrals are made to CDP Legal Advocates)
  - Assist with record review and share impressions with team; may include written summary or digest
- Mitigation report drafting: PPIs, sentencing memos (see CDPSW Guidance on Written Mitigation)
- Other written work product (e.g. release plan letter to accompany psych eval, cover letter for med records)

#### 5. JAIL SUPPORT and RELEASE PLANNING

- Liaise with Correctional Health Services for connections to medical or mental health care
- Liaise with social services for connection to jail-based programming (if available)
- Coordinate for release from DOC custody to community and/or programming (while legal case still pending)  
*PRP scope of work for advocacy for incarcerated clients can be found here.*

#### 6. SOCIAL WORK CONSULTATION

- Case theory consultation
- Competency consultation
- External behavioral health evaluation consultation, assistance coordinating eval, and/or report review
- Consultation or assistance with client interviewing consultation and/or Atty/client communication:
  - Client experiencing psychosis or other MH symptoms that impact atty/client communication
  - General challenges in atty/client communication that are impeding atty's ability to talk through allegations, gather information, counsel client, or check for understanding
  - Atty requested assistance discussing particularly sensitive topic with client

#### 7. SOCIAL WORK SUPPORT

- Crisis intervention and/or safety planning
- Support for client while navigating offers or choice points in the case
- Court support\*
  - In-court advocacy (on or off the record)
  - Substantive conversations with attorney and client: L1 convos, new offers, choice points on case
  - Substantive court appearances: grand jury prep, plea, hearings start, trial likely to start, sentencing
  - Live court-support for people who struggle to navigate court appearances w/out rearrest or other negative outcome
  - Information gathering and/or relationship building with clients at court (priority for people are unreachable or hard to reach outside of return court dates)
- Trial support\*
  - Trial theory consultation
  - Testimony or other client trial prep
  - Live court-support at intervals throughout hearings or trial

*\*“Support” tasks/roles always need to connect back to the legal case; consult “Flags” and Framework for CDP SW Referrals and above linked guidances for more info*