

A New Tool for Social Work Education: The Mezzo-Informed Ethical Decision-Making Model

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Abstract: *Traditional ethical decision-making models largely address dilemmas through the lens of the individual social worker and client. These models do not consistently examine privilege and other cultural factors, mezzo and macro contexts, and the larger team in the work setting. While nearly all existing decision-making models focus on the one-on-one relationship between clients and social workers, the Mezzo-Informed Ethical Decision-Making Model is a new 10-step tool that builds on existing work and adds organizational considerations, as well as the provider's social privileges and biases, cultural responsiveness, and impacts on the community and agency. The model, designed for teaching students and early-career providers, is presented step-by-step with an illustrative case study. The Mezzo-Informed Model fills a gap in current approaches by accounting for the mezzo system of an agency where others are involved in the process, knowing that the individual provider is frequently not the sole decision-maker. Behavioral health educators are encouraged to use this model paired with a case study to support students in developing ethical critical thinking skills.*

Keywords: *Ethics, ethical decision-making model, culture, social work education*

Professional ethical guidelines in social work have evolved consistently over the past 100 years (Reamer, 2013, 2018). Ethical decision-making models were first developed in the early 1980s out of recognition that the professional codes were inadequate at guiding individuals in the face of competing values (Reamer, 2013). The purpose of these models is to help guide students and social work professionals through a decision-making process with a formulative and consistent set of questions which provide a foundation for problem-solving that aligns with social work values.

There already exist a number of ethical decision-making models in healthcare fields, some of which are popularly taught in social work education. For example, the ETHIC model uses an acronym to help practitioners easily recall the five steps in the process: Examine the various values involved; Think about the National Association of Social Workers (NASW) Code of Ethics and relevant laws; Hypothesize the pros and cons with the different courses of actions; Identify who will benefit and who will be harmed; and Consult with one's supervisor or colleagues (Congress, 2000). Congress suggests evaluating the values and ethics at play and considering relevant legal precedent before brainstorming outcomes and consequences, and ultimately gathering support from supervisors.

A widely referenced resource in the field of ethics, Frederic Reamer's (2018) decision-making framework is a comprehensive assessment of ethical decision-making processes

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by social workers. This seven-step framework, first published in 1995, also explores values, ethics, and laws within actual risks and challenges, and asks social workers to consider outcomes and who may be affected by decisions. Reamer introduces a consultation process including the documentation and evaluation process during and after a decision has been made.

Dolgoff and colleagues (2011) developed a generalized approach with their decision-making model. They expanded on Congress's and Reamer's models by having the worker identify other people involved in the process of coming up with a solution, goals for the resolution of the identified problem, and assessment of whether each proposed solution is effective for those goals.

More recently, Elizabeth Welfel developed a ten-step ethical decision-making model. While she builds on Reamer's model from 1995, she includes a unique first step to work on developing an ongoing professional and personal ethic in preparation for ethical decision-making through self-reflection and continuing education (Welfel, 2016). She also is one of the first to suggest examining the sociocultural environment in which the dilemma is occurring (Welfel, 2016).

Biomedical ethics models have also informed ethical decision-making in social work. Bernard Gert's theory of common morality, or that society has a generally agreed-upon moral system, has been used by social work educators to encourage students to identify the roots of their decision-making reasoning (Bryan et al., 2022). Joan McIver Gibson, a leader in biomedical ethics, has written about beginning and ending ethical decision-making with communication among stakeholders that encourages reflection throughout the process, rather than simply after a decision is made (Bennett & Gibson, 2006). Gibson's subsequent work builds on this concept by adding an instruction to pause in the face of pressures to react, followed by a value-based decision-making process (Gibson, 2013). Both works conclude with an instruction to be clear in the communication of the decision and reflective of lessons learned (Bennett & Gibson, 2006; Gibson, 2013).

The Council on Social Work Education (CSWE) requires in their Educational Policy and Accreditation Standards (EPAS) that baccalaureate and master's students "understand frameworks of ethical decision making and apply principles of critical thinking to those frameworks in practice, research, and policy arenas" (CSWE, 2022, p. 8). Some research has shown that, despite this educational requirement, practitioners infrequently use ethical decision-making models in favor of intuition (Johnson et al., 2022). This gap in practice only further supports why a comprehensive ethical decision-making process should be taught to bachelors and master's students in order to develop their critical thinking skills.

While there are many strengths in the existing models, the authors will show that there is a gap in considering an agency setting where new and emerging social workers are often required to involve or even defer to others, such as their supervisor, in their decision-making. Consequently, this impacts how ethical decision-making is taught, and could leave students unprepared for ethical dilemmas in practice. The authors will also illustrate that, while there has been improvement on discussion of cultural considerations in more recent ethical decision-making models (Welfel, 2016), a gap remains regarding consideration of

a social worker's privilege and implicit bias. The authors will then suggest a new ethical decision-making model to fill these gaps.

Literature Review

Ethical Dilemmas, Early Career Social Workers, and Current Practice Considerations

While social workers who are early in their career or are students in field placements may not be final decision-makers on ethical dilemmas, they are expected to know when an issue warrants supervisory review (Congress, 2000; Corey et al., 2006; Hill et al., 1995; Raines & Dibble, 2021; Stadler & Paul, 1986; Steinman et al., 1997; Welfel, 2016). After graduation, early career social workers are more likely to struggle with lack of confidence in their abilities and fear of failure (also known as *imposter syndrome*), compared to more experienced colleagues (Hochman et al., 2023; Urwin, 2018). Inconsistencies in clinical supervision across practice sites also leave some without ethical guidance from supervisors or clarity about their role in decision-making as non-independent clinicians (Chircop Coleiro et al., 2023; Li et al., 2022). The combination of imposter syndrome and inadequate supervision could result in early career social workers either 1) deferring to their supervisor as to ethical decision making or evaluation, even when they have reservations about their supervisor's recommendation or 2) making clinical decisions independently that they do not yet feel ready to make.

The current political climate in the United States has resulted in some states banning education on Critical Race Theory (CRT) and antiracism, diversity, equity, and inclusion (ADEI) topics (CSWE, 2025). While social work education and funding can attempt to work around this through renaming lessons and classes (Barsky, 2025), everyday ethical dilemmas stemming from injustice and inequities continue in practice, adding urgency to social work education to consider both learning and practicing in these conditions (CSWE, 2023). Implicit bias, use of privilege, and an anti-racist/anti-oppressive lens are all concepts needed in social work education (Gottlieb, 2021; Greenfield et al., 2018; O'Brien & Willison, 2022).

Lastly, while critical thinking skills can be difficult to define and operationalize, there has been increasing interest in how to teach and improve these skills in social work students because of the dynamic nature of social work practice (Boryczko, 2022; Johnston, 2009; Miller et al., 2009, 2011). Developing critical thinking skills is a key component to social work education's competencies, which should be integrated throughout the curriculum (CSWE, 2022). Examining and addressing the ambiguous nature of ethical dilemmas is a critical method of growing these skills (Boryczko, 2022).

Intersections of Cultural Competence With Social Work Ethics

Social work has had a longstanding commitment to teaching cultural competence. The CSWE first mandated that social work programs include information on gender and racial diversity in their curriculum in 1971 (Daniel, 2008). This was expanded in the 1990s to

include sexual minorities and people with disabilities, as well as a new mandate to include this content in required courses (Daniel, 2008; Kohli et al., 2010). In 1994, the International Federation of Social Workers (IFSW) and the International Association of Schools of Social Work (IASSW) published a training manual that emphasized social work's role for advocating for human rights (Healy, 2007).

The NASW Code of Ethics has also for some time included a mandate on cultural competence (Abrams & Moio, 2009; Healy, 2007; Kung & Johansson, 2022; Reamer, 2013; Simon et al., 2022; Wahler, 2012; Wong & Chau, 2022). The most recent update to the Code of Ethics includes stronger language requiring social workers "take action against oppression, racism, discrimination, and inequities, and acknowledge personal privilege" (National Association of Social Workers [NASW], 2021, p. 10). As of this writing, the NASW is planning for its next revision of the Code's standard 1.05 on Cultural Competency (NASW, 2025). Because all social workers must learn and abide by the NASW Code of Ethics, this is considered a critical way to communicate values about culture and diversity starting at early stages of professional development (Azzopardi & McNeill, 2016).

There is a significant volume of literature on how cultural competence, rather than being a self-contained section of the Code of Ethics, intersects with other sections throughout the Code. Examples of this include: cultural practices that some may perceive as rights violations (Healy, 2007); cultural concepts of self-determination and beneficence (Healy, 2007; Kung & Johansson, 2022; Montero, 2011); dilemmas between two or more identity group's values (Pollack, 2007); how informed consent is determined (Palmer & Kaufman, 2003); dual relationships in rural communities or minoritized groups within a community (Boland-Prom & Anderson, 2005; Freud & Krug, 2002; Green et al., 2009; Weinberg & Campbell, 2014); and doing research in marginalized communities of which one is not a part (Rogers & Brown, 2023). Kung and Johansson (2022) note that social work ethics and culture naturally intersect because social workers' cultural lenses "affect how practitioners define normality" (p. 248). Because social workers have at least some clients who have different backgrounds and experiences than their own (Wahler, 2012; Williams, 2006), it is logical that social work education would address culture and diversity throughout the curriculum, including in teaching ethical decision-making.

Social Work Educators' Challenges With Teaching Cultural Competence

Perhaps out of this recognition of the importance of cultural competence in social work education, there have been extensive critiques about how educators have been teaching this topic, two of which are of particular interest in relation to ethical decision-making. The first is concern that cultural competence is taught in a superficial way that focuses on group differences, rather than addressing oppression or taking an explicit position on anything that may seem political in nature, like social justice issues (Abrams & Moio, 2009; Azzopardi & McNeill, 2016; Daniel, 2008; Green et al., 2009; Kohli et al., 2010; Simon et al., 2022; Strickland & Sharkey, 2022; Webb, 2009). Strickland and Sharkey (2022) noted that "faculty are often a barrier to anti-racist pedagogy due to a lack of comfort with the content, which subsequently leads them to avoid including the practice in their teaching

methods” (p. 243). Teaching to this level of complexity requires navigating students’ defense mechanisms and biases. If unchecked, implicit biases can create an oppressive classroom environment that replicates the very injustices that the Code of Ethics mandates that social workers combat (Rogerson et al., 2022; Simon et al., 2022; Strickland & Sharkey, 2022).

The second critique of how social work education teaches cultural competence relates to concerns about the frequent adoption of an ethically relativistic lens, where “all cultural practices, including those that are potentially harmful, as equally valid, resulting in interventions that are too weak or hesitant” (Azzopardi & McNeill, 2016, p. 285). There has been identified need to correct approaches that assume a universal set of morals and values (Healy, 2007; Kung & Johansson, 2022; Weinberg & Campbell, 2014) and/or view minoritized communities through a deficit lens compared to majority communities (Azzopardi & McNeill, 2016; Daniel, 2008; Strickland & Sharkey, 2022; Wong & Chau, 2022). However, there does not yet appear to be an ethical decision-making model that directly addresses these issues; in fact, some models taught in social work only reinforce this relativistic view by presenting morals and values as strictly a personal preference, with little to no consideration of the larger ecosystem (Bryan et al., 2022).

Cultural Competence in Ethical Decision-Making Models

There have been efforts made to improve how social work educators are teaching both cultural competence and ethical considerations. Some cultural competence teaching models now include explicit social justice considerations and also make references to ethics, although the latter is not the focus (Boland-Prom & Anderson, 2005; Cox & Singh, 2024; Daniel, 2008; Kohli et al., 2010; Milner & Wolfer, 2023; Simon et al., 2022; Wahler, 2012). Ethical decision-making models have been critiqued for lacking meaningful exploration of cultural bias (Johnson et al., 2022), such as not going beyond the social worker naming their personal cultural values (Reamer, 2018). Welfel’s (2016) model does include identifying the sociocultural context, although this too does not explicitly engage with bias.

In summary, social work students need more opportunities to think critically about how culture and social justice are addressed in ethical decision-making. The authors are proposing a new model that expands on the structure of established models and creates new steps to address these specific needs.

The Mezzo-Informed Ethical Decision-Making Model

The Mezzo-Informed Ethical Decision-Making Model acknowledges that many students and early career social workers are working in settings where decision are not made alone (Lacasse & Gambrill, 2015). Mezzo settings are the organizational level, as contrasted with the micro practice of working with individuals, groups, and families, or the macro practice of working with communities and policymakers (Lacasse & Gambrill, 2015; Mattocks, 2018). Many social workers work in these mezzo settings, which are sometimes called “host settings (that is, settings that are not organized around a social work

mission or run by social workers)” (Lacasse & Gambrill, 2015, p. 76). Regardless of the specific hierarchy of the organization, the decision-maker is frequently the social worker’s supervisor, rather than the social worker themselves.

The Mezzo-Informed Model takes concepts from existing models, particularly Reamer (2018), and incorporates additional steps influenced by the NASW Code of Ethics cultural competence values, as well as an ecological model approach that considers mezzo and macro factors. Because the urgency of an ethical dilemma can cause individuals to act impulsively, this model encourages practitioners to pause and reflect before taking action and close with a commitment to reflect and integrate lessons learned (Bennett & Gibson, 2006; Gibson, 2013).

In the Mezzo-Informed Model, shown in Table 1, the social worker is instructed how to bring their case to the supervisor, rather than merely having the supervisor as a consultant (Congress, 2000; Reamer, 2018; Welfel, 2016), as well as how to handle the disappointment when a decision is made differently than the outcome they expected. The inclusion of mezzo systems broadens the application of this proposed model to settings beyond clinical work, while also applying to direct practice and acknowledging the larger system that the clinician is frequently asked to navigate during a dilemma. Additionally, the Mezzo-Informed Model goes deeper than previous models on exploring the social worker’s privilege and bias.

The aim for introducing a new model and teaching method is to increase critical thinking and decision-making skills for bachelors and master’s social work students who are preparing for social work practice. Because this new model addresses principles of social justice and awareness of privilege regarding social, racial, economic, and environmental justice, it aligns with CSWE accreditation standards (Council on Social Work Education, 2022) and could be integrated into existing social work curricula.

Table 1. *10 Steps of the Mezzo-Informed Ethical Decision-Making Model*

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1. Clearly articulate the dilemma
 2. Name all who are impacted and the potential consequences
 3. Identify competing values and/or loyalties
 4. Identify the decision-maker(s)
 5. Check privilege and implicit bias
 6. What are you up against: Research laws, regulations, and code(s)
 7. Consider evidence-based knowledge and best practices
 8. Present to the decision-maker(s) and document
 9. Communicate the results professionally
 10. Debrief and evaluate with staff
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The remainder of this article will cover each of these steps in detail, using a case study with aliases as an illustration.

Introduction to Case Study: Terry

Terry is a White, cisgender, female, 53-year-old social worker at a local housing program providing case management services and a path toward permanent housing. Most of the 25 clients on her caseload are Latina, and Terry is fluent in Spanish. Terry has been at the agency for just under one year and it is her first job after receiving her MSW.

The agency's Executive Director is a White woman in her mid-60s. Terry's supervisor is the Director of Client Services, a bilingual Latina in her 30s who is new to the agency and responsible for the 15 staff and their 300 clients.

The agency has a strict policy of no drug use and requires monthly urine analysis tests (UAs). According to the agency's policy, the consequence for drug use is to be discharged permanently from the program, which often means removal from services and dropping to the bottom of waitlists for housing. Despite the formal discussion of that policy during each client's intake, Terry notices each month several of the clients fail their UAs. When confronted, most admit to having relapsed, but express remorse and a commitment to staying sober if given a second chance.

Terry has been working with a client for 6 months and this was their first positive UA. Prior to the relapse, the client obtained employment, managed all of her case management appointments, and was progressing toward each of her goals.

10 Steps of the Mezzo-Informed Ethical Decision-Making Model

Step 1: Clearly Articulate the Dilemma

To get a complete picture of the ethical dilemma, the social worker needs to organize their thoughts. Written notes are one way the social worker can do this in preparation for talking with their supervisor, although they should contain no identifying information. It is important to identify the key issues, as the supervisor will need the situation to be presented to them in a clear and concise manner. As with any dilemma, the social worker must be able to identify at least two conflicting actions they are considering as options. When teaching the model, instructors are recommended to have students write out the dilemma and key issues to practice this skill.

Terry would like to work with the client to remain in the program, but is aware of the strict policy. Terry considers doing nothing and ignoring the positive UA, but she knows that if she did that, she would probably lose her job. She understands that the policy exists to protect other clients and mitigate risk for the agency. She might also be doing a disservice to the client by not allowing the client to understand the gravity of her drug use. She recognizes doing nothing really isn't a viable option.

Terry is contending with two viable options. The first is to move forward and follow the protocol to meet with the client and plan for discharge, offering referrals where

she can, but ultimately dismissing her from services. Terry believes removing the client from services will leave the client without safe housing and will put the client at significant risk. Her second option is to speak with the supervisor and advocate for the client to be given another chance and, ideally, a review of the policy for future clients.

Step 2: Name All Who Are Impacted and The Potential Consequences

The purpose of this step is to consider more broadly who is impacted by the decision, often beyond the client and social worker. This can include, but is not limited to, the client's family and friends, the agency, and/or other service providers involved with the client and/or in the community. Considering the consequences for all parties can help clarify the stakes in the decision.

Terry thinks about who and what is affected by enforcing this policy. Terry recognizes she would feel frustrated with the agency if she were to let go of her client. But she would be able to help someone in the program who is following the policy or someone who is on the waiting list. The client would be affected by the disruption to services, and the removal could hinder the client's capacity for remaining sober or working with service providers in the future. The agency could be seen negatively by clients and the community as an unsupportive program. But they would also be maintaining a fair and safe environment.

Terry considers the reality that if an exception were made for this client, then other clients in the same situation would expect an offer for a second chance. Looking more broadly at her request to advocate for the policy change, she recognizes a decision away from a zero-tolerance policy might affect referrals from other agencies.

Step 3: Identify Competing Values and/or Loyalties

Social workers often have competing loyalties between their clients and their employer. Additionally, many ethical dilemmas include competing professional values, such as social justice versus competency, or self-determination versus cultural competence. Inherent values, including cultural perspectives on how to handle situations, further influence a social worker's lens, and may even conflict with professional values. It is important to consider how these competing values and loyalties contribute to the ethical dilemma.

Terry acknowledges she is feeling conflicted between loyalty to the client and adherence to the agency's policy. She personally feels drug use is dangerous and the client needs to get sober. Terry is also familiar with the cycle of addiction and how common it is for users to relapse. She appreciates the agency's mission to help people discontinue use and that the agency's policy is an attempt to provide motivation to stay sober.

Terry values self-determination, autonomy, and dignity of clients, even while recognizing a client's decisions can conflict with agency policy, but she worries about cutting the client off and putting them into a worse situation.

Step 4: Identify the Decision-Maker(s)

Because the focus of this model is on teaching students and early career social workers, this is a critical step. Part of this process is for the social worker to consider what is or is not in their control, and who else may be making choices in this process. Using the Mezzo-Informed model can help the social worker prepare a case for the decision-maker so they are working with complete and organized information, including communicating the client's interests. The social worker can be an advocate for policy change within their agency in instances where policies conflict with serving clients.

Terry recognizes that her dilemma is not about what the client does, but rather the agency's zero-tolerance policy. Although Terry will have to be the one to enforce the policy, the policy maker, and thus the decision-maker, is the agency leadership and her supervisor. Terry does not have control over the policy.

Step 5: Check Privilege and Implicit Bias

Considering privilege and implicit bias is an important aspect of an ethical dilemma. These could be impacting the social worker's perspective, as shown in Step 3, and may be directly influencing the values and loyalties considered. Even a social worker who experiences one or more areas of oppression naturally has some privilege in their organization compared to their clients. Consulting with a social work colleague may be beneficial at this step to ensure the social worker is not missing anything critical.

Terry reflects on the class privilege she had in her childhood and how this impacted her views. She never had to worry about daily life the way many of the clients do, and she was never exposed to drug use in her environment. She had a supportive family and alternatives to deal with her own issues. For Terry, the decision to not do drugs seems simple. For the clients, the situation is more complicated, and they are trying to quit substances after years of use.

Terry thinks about the generation she was raised in primarily aligning with the concept of zero-tolerance, while her more recent education focused more on a harm-reduction model.

Terry checks in with a coworker who has been with the agency longer than Terry, asking about what has ultimately happened to their clients who have been removed from the program. The coworker mentions their clients who were dismissed from the program remained unhoused and faced additional hardship, including violence, poor health, and lack of opportunity which compounds the challenge to maintain sobriety.

Step 6: What Are You Up Against: Research Laws, Regulations, and Codes

In order for social workers to know what they're facing, they must have familiarity with the policies impacting the dilemma. In preparing to meet with a supervisor or preparing documentation, noting the relevant laws, codes, policies are critical. As can be seen from the case study below, conflict with a specific law, regulation, or code is not indicative of the final decision. To make an informed decision, social workers must consider:

- Relevant legal statutes and codes;
- The NASW Code of Ethics or ethical code relevant to the individual's profession;
- Agency policies; and
- Expectations outlined in any relevant fiscal sponsorship, such as grants or contracts that fund the program.

A review of legal statutes and relevant codes of ethics is a standard component of ethical decision-making models (Congress, 2000; Reamer, 2018; Welfel, 2016). The Mezzo-Informed Model adds a review of organizational policy and fiscal sponsorship, since a reduction in resources could result in clients losing access to services. By considering these additional components, the social worker and their supervisor can comprehensively consider how much risk is at stake and how much risk is tolerable. Joan McIver Gibson described contemplating "can it land you in jail, lose your license, incur a fine on the agency?" (personal communication, July 30, 2019).

While trying to understand the scope of her dilemma, Terry reviews the law regarding this situation. She finds no law that requires an agency to keep the client in services. Terry considers that the client was notified during intake of the agency's policy for drug use and notes the relevance to National Association of Social Workers (NASW, 2021) Code of Ethics standard 1.03, Informed Consent. However, she also notes standard 1.01, Commitment to Clients, and the expectation to prioritize the "well-being of clients" (NASW, 2021, p. 7). This affirms her belief that the client's well-being is best served by staying with the program with measures like a transition plan and peer support services to help her with her drug use.

Terry considers standard 1.17, Termination of Services: "Social workers should take reasonable steps to avoid abandoning clients who are still in need of services....[and] should withdraw services precipitously only under unusual circumstances, giving careful consideration to all factors in the situation and taking care to minimize possible adverse effects" (NASW, 2021, p. 17). Terry also notes the same standard describes the importance of ensuring there are referrals to other services when a client's services are terminated. Terry is aware that if the client leaves, they would find a long waiting list and limited services elsewhere in their community. Terry considers the NASW Standards for Social Work Case Management that state she should promote and advocate for clients to receive services (NASW, 2013).

Terry considers standard 3.07, Administration, specifically part D regarding ensuring administrative practices are in alignment with the Code of Ethics (NASW, 2021). She recognizes there is an opportunity to advocate on behalf of the client and their right to self-determination.

Step 7: Consider Evidenced-Based Knowledge and Best Practices

Data and information on best practices can help inform the decision made in the ethical dilemma. Many dilemmas have been explored by practitioners before and have generalizable aspects. Finding existing information can give additional context and perspective. That said, whether or not to use this data is in itself an ethical decision to make.

Terry searches for information to help her demonstrate that many agencies are replacing zero-tolerance policies with a harm-reduction model that states terminating a client's services should be a last resort after an intervention process that involves the client. She includes several of these research articles on outcomes for incorporating harm-reduction to bring into her meeting with her supervisor.

Step 8: Present to the Decision-Maker(s) and Document

This is the point at which the social worker would put together the information gathered during Steps 1-7 and prepare it for presentation to the supervisor. Documenting what is presented, what the social worker recommends, and what the final decision is will be beneficial in the event that there are any questions about this process after the fact.

Terry decides that she needs to consult with her supervisor as she needs guidance and someone to discuss the conflict with. Her supervisor may have previous experience as well as a different cultural lens to the case that Terry may not have considered.

Terry writes up her deidentified notes, including citations from the Code and the manual she found, and meets with her supervisor. In the meeting, she mentions she feels conflicted because the Code of Ethics requires administration to act in support of a client's well-being (National Association of Social Workers, 2021) and she fears this situation may be in violation.

Terry acknowledges that her supervisor is responsible for client service delivery, and she knows her request goes against agency policy, but that she wants to keep the client in the program despite the client's drug use.

The supervisor acknowledges the ethical dilemma and appreciates Terry's empathy for the client. Ultimately, she tells Terry that the agency policy must be upheld. Terry is told to let the client know that due to their violation of the drug use policy, they will be immediately removed from the program and dropped to the bottom of the housing waiting lists. Her supervisor tells Terry to meet with the client specifically to discuss this policy and what it means for the client's services and to make a transition plan with the client to address Terry's concerns.

Because Terry is familiar with the model, she knows there is a tenth step (Debrief and Evaluate) so as she accepts the directive to meet with the client, she asks if at a later point, she can meet with the Executive Director to debrief. The supervisor agrees that discussing the policy with the Executive Director may be useful. Terry asks if along with a meeting to discuss the policy, her supervisor could set up future training and support navigating clients' self-determination and harm-reduction models, especially given the lack of community resources. Her supervisor suggests they contact the Executive Director to advocate for these trainings together.

Step 9: Communicate the Results Professionally

Even if the social worker is not pleased by the decisions, it remains their ethical responsibility to deliver the news to the client without causing more harm. Regardless of who the decision-maker was, the social worker is part of the system that influenced the decision and, as a result, represents the agency in the eyes of clients. Defensiveness and casting blame center the social worker's feelings and may have a negative impact on the client. When communicating the decision, the social worker should be empathetic and caring while informing the client about who was involved in making the decision and what was considered. Any parties who are impacted should be informed as well, within the bounds of privacy laws. In addition, the social worker should see if the client has any questions and make sure the client is fully informed about the agency's appeal process if they do not agree with the decision.

This is also a point at which the social worker should reflect on their personal values and conflicting loyalties that they visited in step 3. If the social worker believes the agency policy is substantially misaligned with their personal or professional values, they may need to do a separate analysis of the pros and cons of staying employed there. Regardless, the social worker has an obligation to communicate to the client and move into Step 10.

After meeting with her supervisor, Terry reflects on her disagreement about the decision. However, she also continues to believe in the organizational mission to help individuals quit using substances. Terry wants to continue working at the agency while advocating for changes in policy. First, however, she must communicate with the client about the policy.

Terry meets with the client alone. Terry does not share her personal feelings that she disagreed with the agency's policy, Terry explains how she discussed the client's situation with her supervisor to explore the available options and that the only course of action permitted at the agency was to follow the policy that the client agreed to during intake. Terry validates the client's frustrations and works with her to craft a transition plan and referrals. Terry also shares the agency's appeal process with the client. Terry documents in her notes the plan as well as her previous discussion with the supervisor.

Step 10: Debrief and Evaluate With Staff

Many ethical decision-making models have an evaluation component, although like other parts of existing models, this is usually only focused on the individual (Bennett & Gibson, 2006; Hill et al., 1995; Reamer, 2018; Stadler & Paul, 1986; Welfel, 2016). In the Mezzo-Informed Model, this process is done both at an individual level and at an organizational level. A social worker can reflect on what they learned and if they would do things the same way again in light of the outcome. The leaders of an agency can reflect on policy, training, and impacts on stakeholders. As true ethical dilemmas always have negative outcomes for one or more parties, everyone involved may have repairs they need to make, regardless of the decision that was made. This final step also involves reflecting on privilege and bias again, as these may influence the perspective the social worker and their supervisor have about what was an acceptable outcome and who could tolerate the most risk.

It is important to keep in mind that “every policy in every institution in every community in every nation is producing or sustaining either racial inequity or equity, racial injustice or justice” (Kendi, 2019, p. 21). The ones who are most impacted by policies are typically the furthest ones away from decision-making in an agency, as was the case in this case study. Individuals who are part of one or more minority communities may experience significant consequences from these decisions, as well as the least amount of influence on the decision. Closing the process by reflecting on any potential harm done through the agency’s policy, protocol, or culture is the final step. This could include seeking out more training and integrating best practices of which the team was previously unaware, in order for agencies and their policies to be more responsive to the diversity of their clients and better reflect the organizational mission.

At the next staff meeting, Terry discusses her experience and the process, including the conflict she felt with the Code of Ethics and with the articles she found that supported her advocacy for a harm-reduction policy. Her supervisor supported her in discussing the need for extra guidance and training. She had to follow up several times, but eventually, this was granted.

Three months later there was a planned debrief on how often this issue comes up. Terry recommended the idea of a task force to look at the issue and volunteered to help assemble a team. The task force would explore the issue and approach the Executive Director and Board of Directors with solutions to help future clients.

In the end, Terry respected and aligned herself with her supervisor’s decision about the situation. While she did not agree, Terry let the client know of the agency’s policy and facilitated her removal from the program. She remained concerned about the issue and shifted her focus onto the Executive Director by advocating for conversations to examine the impact of the agency’s policy of removing clients who struggle with addiction. Terry also asked for the agency to provide staff with training on self-determination, harm reduction models, and substance use and equity issues.

Discussion

This theoretical ethical decision-making model and case study illustrate the importance of considering mezzo settings (Lacasse & Gambrill, 2015). It addresses the critical role of the supervisor and organizational leadership in decision-making as in the case with Terry with her conflict between agency policy and her desire to advocate on a social justice issue. Terry realized early in the process she was not the decision maker and would be preparing her case for her supervisor, which is beyond mere consultation, as in other models (Congress, 2000; Reamer, 2018; Welfel, 2016).

The model goes further with examining privilege and implicit bias than any previous ethical decision-making model (Johnson et al., 2022; Reamer, 2018; Welfel, 2016). The Mezzo-Informed Model provides a tool for explicitly engaging with this in an effort to avoid unchecked bias that could lead to poorer outcomes for the individuals impacted by decisions made by social workers (Rogerson et al., 2022; Simon et al., 2022; Strickland & Sharkey, 2022). Future research should examine implicit bias curriculum that pairs best with this model.

The model is to be taught through application and can be taught several ways. In workshops with experienced social workers, case scenarios have been elicited and applied to the model. In the classroom, case studies may be developed in advance where students may apply the steps in a group or work individually. The authors have developed a survey to accompany their teaching which allows for students' reflection on which steps are most effective for their process, and which are less effective, giving them the experience of comparing the effectiveness of two models. The authors are considering a future study using this technique, such as how students respond to this model compared to others, or how the Mezzo-Informed Model may impact the students' learning, awareness of biases, advocacy, and client support.

The first author is writing an instructional guidebook for use in the classroom and workshop. This guidebook includes key concepts and additional resources related to ethical decision making, along with the specific instructions and application for the Mezzo-Informed model. One area not explored in the article but that will be discussed in the forthcoming guidebook are guided activities on bringing awareness of the origins of one's values and their role in developing biases and identifying situations where the ethical conflict sits between loyalty to the employer and the client. Additionally, this guidebook includes direction on biases and use of accountability partners, as well as techniques for preparing documentation to present to a supervisor on the ethical dilemma at hand. Lastly, this guidebook also has interdisciplinary considerations for application to other behavioral health education fields.

Implications for Social Work

The Mezzo-Informed Ethical Decision-Making Model is designed from the perspective that the vast majority of students and early career social workers will be working in community-based programs where dilemmas must be reviewed with their supervisor. The addition of cultural considerations and social justice are needed additions

for holistically considering ethical decision-making. While this could be used by any behavioral health educators, this model is particularly intended to give social work educators a tool for teaching ethical dilemmas that incorporates social work values, particularly during a time period where mezzo systems face ethical dilemmas due to funding cuts that could impact services for numerous vulnerable populations. Social work educators are encouraged to use this model paired with case studies in the classroom to support students in developing ethical critical thinking skills, as well as reflective skills around bias and privilege that relate to ethical decision-making.

The Mezzo-Informed Model is not a panacea for critically discussing cultural competence and ethics in the classroom, but rather, one tool for broaching these topics consistently and respectfully. Challenges with students and faculty discussing race in the classroom (Smith et al., 2017; Strickland & Sharkey, 2022) and students of color being tasked with sharing their lived experience with racism to educate their peers (Perez, 2022) cannot be resolved by a single model, and require continued anti-racist efforts in academia. In the current political environment, this will remain a critical task for all social worker educators in order to ensure that social work values remain at the core of its pedagogy. The authors offer the Mezzo-Informed Model as one tool for addressing this and plan to write a future article on pedagogical strategies with teaching this model.

Conclusion

The Mezzo-Informed Ethical Decision-Making Model is an approach to teaching ethical decision-making with students and early career providers. Areas for further research will include surveying students about their experience learning through this model, as well as case studies from instructors around teaching the model.

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