

# Case Planning and Service Delivery Field Activity

## Collaborative Assessment, Planning, and Support: Initial Case Plan

### **ACTIVE CASE**

Select an active case for which a team meeting to discuss case planning and service delivery is needed or scheduled. (Note: If the trainee is assigned to a case/caseload for which a team meeting is needed or would be part of the day-to-day case planning and service delivery practices, the trainee **MUST** choose this option.)

#### *Learning Objectives*

##### **Field Activity: Collaborative Assessment, Planning, and Support: The Initial Case Plan (3 hours)**

##### **Knowledge**

- K1.** The trainee will be able to identify the benefits to children, youth, families, tribes and the child welfare agency of participating in a team-based planning process to address the family and child's underlying needs.
- K2.** The trainee will be able to identify the purpose of utilizing the Family Strengths and Needs Assessment Tool when developing an initial case plan.
- K3.** The trainee will be able to identify engagement strategies for developing a case plan in full partnership and collaboration with the family.

##### **Skill**

- S1.** The trainee will integrate strength based and solution focused language when discussing safety, risk, strengths, and needs assessment information with the team in a way that provides clear information and engages the family and tribes in developing a case plan.
- S2.** The trainee will partner with the family and tribe to identify safety network members and the process for accessing the safety network.
- S3.** The trainee will use at least one of the strategies to maintain the family team's focus on the case plan as a practical, concrete, prioritized plan for the family that addresses the concerns defined by the family and others.
  - a. Identifying and focusing on underlying needs, shared goals, and decision criteria throughout the process
  - b. Emphasizing common factors that promote consensus in the group discussion
  - c. Facilitating dialogue which considers alternatives and possible solutions
- S4.** The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with a child, youth, parent/caregiver, family and tribe (inclusive of the family's team) using language that is understandable to all.
- S5.** The trainee will enter S.M.A.R.T. case plan objectives for the CWS/CMS case plan.
- S6.** The trainee will enter the case notes narrative for the meeting in CWS/CMS

##### **OR**

- S7.** In a team setting, the trainee will participate in a case plan observation activity utilizing an observation tool and case plan worksheet to demonstrate critical thinking skills.

**Values**

**V1.** The trainee will value the role of the team in developing case plan that meets the needs for safety, permanency, and well-being of the child. **V2.** The trainee will value transparency in discussing risk, safety, and the role of the court with the family and their team.

**V3.** The trainee will value affirming the unique strengths, needs, life experiences, and self-identified goals of each child, youth, young adult, and family.

**V4.** The trainee will respect and honor the voice and choice of the child, parent/caregiver, youth, young adult, family and tribe.

**Activity**

**Practice Area:** Case Planning and Service Delivery

**California Core Practice Model Practice Behaviors:** 1 (a-f), 2 (a-b), 3 (a-c), 4 (a-g), 5 (a-d), 6 (a-c), 7 (a-f), 8 (a-e), 9 (a-f), 11

**Estimated Time Required:** 3 hours

**Related eLearning/classroom:**

- Purposeful Invitation
- Case Planning Basics
- Writing Behavioral Objectives
- Case Planning in a Team Setting

**Description of Activity:**

The social worker will participate in or observe a case planning meeting with a family to develop the initial case plan.

This activity is designed for initial case plan development. Examples of team-based case planning opportunities that can be utilized for this field activity include (but are not limited to: safety planning meetings, mappings, TILP/TILPC, CFTs, or other case planning types of meetings. The process of case planning does not happen during one meeting, rather, it is a series of activities that engage the child, youth, parent, family, tribe, and any other member of the safety network in identifying a safety goal. The family's strengths and needs inform what actions are needed to provide safety and identify which services will help reduce risk and provide for well-being of the child(ren). With the understanding that there are many activities that are part of the case planning process, this field activity will focus on the last step – bringing the safety network together to finalize the case plan. Some of the case planning activities that may have occurred prior to the case planning meeting with the safety network include, but are not limited to:

- Completing the Family Strengths and Needs Tool
- Working with the family and tribe to identify safety network members
- Meeting with individual members of the safety network to gather their input regarding the family's strengths and what is needed to provide safety for the child
- Working with the family and other members of the safety network to determine the safety and permanency goals for the child
- Exploring culturally responsive services and community-based supports

- Exploring with the family and other members of the safety network the specific actions and strategies to meet the family's unique needs that provide safety and support the well-being of the family.

### Before the practice opportunity

#### Field Advisor Responsibility:

- ☐ Review Field Advisor Guide
- ☐ Review Learning Objectives
- ☐ Review the SDM Safety Assessment, Risk Assessment and FSNA tools to focus the case plan development meeting
- ☐ Meet with the social worker to:
  - Create agreements, discuss learning style, and establish feedback loop
  - Explore comfort level with SDM tools
  - Review SMART Objective process
  - Identify a case for the activity
- ☐ Discuss with the social worker what may be needed prior to the meeting to feel prepared? Utilizing a scaling question, have the social worker scale their comfort level and experience with developing a case plan with a family. Some follow up questions may include:
  - What has gotten you to a \_\_\_\_? How have you prepared to facilitate a case planning meeting with the family?
  - What would it look like to move up one step on the scale? What would the social worker be able to demonstrate that shows they are prepared to develop a case plan with the family?
- ☐ Work with the social worker to prepare a preliminary danger statement or summary of the safety threats, which uses language that would be understandable to the family.

#### Social Worker Responsibility:

- ☐ Ask any questions or clarify expectations for the activity.
- ☐ Review:
  - SMART Objectives
  - Case Plan Field Tool  
[http://calswec.berkeley.edu/sites/default/files/uploads/case\\_plan\\_field\\_tool\\_for\\_parents\\_122014.pdf](http://calswec.berkeley.edu/sites/default/files/uploads/case_plan_field_tool_for_parents_122014.pdf)
- ☐ Reflect on personal bias that may impact the development of the case plan
- ☐ Discuss where the meeting will take place: date/time/location (preferably the family's home)
- ☐ Have a conversation with the family and their identified safety network about:
  - Who will attend?
  - What can they expect?
  - What are any cultural considerations that the team should discuss or be aware of?

### During the practice opportunity

#### Field Advisor Responsibility:

- ☐ Observe the social worker's use of engagement skills, solution focused questions, appreciative inquiry, and strength-based language
- ☐ Help to ensure that the language used is family friendly, understandable and culturally sensitive. Help to reframe statements or clarify if needed.

- ❑ Ensure SMART objectives and services are related to the safety threat(s) and reason for the family's involvement with child welfare services.
- ❑ Observe the social worker's ability to:
  - Partner with tribal connections and family teams
  - Identify and focus on shared goals
  - Promote consensus building
  - Facilitate dialogue which considers alternative solutions
- ❑ Observe the social worker's ability to:
  - Identify a safety network with the family
  - Develop SMART objectives to meet the case plan goals and address underlying needs
  - Manage conflict which may arise

#### **Social Worker Responsibility:**

- ❑ Partner with family to identify safety/support network
- ❑ Engage the family members (child, youth, parent/caregiver, tribe, safety network) in a conversation about why the Department is involved, including development of a danger statement if appropriate.
- ❑ Utilize the Case Plan Field Tool to provide a structure for asking strength based solution focused questions
- ❑ Encourages the family to describe their strength and needs
- ❑ Identify the safety goal
  - What would it look like when all of the safety threats/concerns have been addressed?
  - How will the team measure the family's progress in demonstrating acts of protection over time?
- ❑ Check with the safety network about their willingness/confidence/capacity to be involved in the safety planning
- ❑ During the facilitated meeting continually check in to ensure there is consensus and understanding about the plan
- ❑ Utilize strategies to defuse conflict if/when it arises
- ❑ Assist family in prioritizing services and SMART objectives to effectively address the underlying needs
- ❑ Ensure the voice and choice of the child, parent/caregiver, family and tribe
- ❑ Allow time for questions the family/safety network may have
- ❑ Set up a follow up meeting

#### **After the practice opportunity**

#### **Field Advisor Responsibility:**

- ❑ Discuss the meeting with the social worker. Some things to identify as part of the reflection on the practice include:
  - Was the safety network identified in partnership with the family? Who has agreed to be part of the safety network?
  - What are some of the engagement and assessment strategies used during the meeting?

- Have social worker self-evaluate what worked/what needed improvement and why
    - What SMART objective and goals were developed?
    - Does the plan meet the family's underlying needs?
- ❑ Review safety goals and case plan objectives with the social worker.
- ❑ Discuss which SDM tools were completed and how this information was shared with the family and their safety network.
- ❑ Provide feedback about what went well and suggestions to enhance practice.
- ❑ Discuss and review the case plan which was developed CWS/CMS
- ❑ Discuss and provide feedback about the contact narrative
  - Language/terminology used
  - Accuracy
- ❑ Complete the Field Advisor **Case Planning and Service Delivery** survey:
  - [https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV\\_5dxKIdW9UfZ9bdb](https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_5dxKIdW9UfZ9bdb)

#### **Social Worker Responsibility:**

- ❑ Create the case plan in CWS/CMS.
- ❑ Enter the contact narrative in CWS/CMS regarding the case planning meeting.
- ❑ Bring the following documents to review with the field advisor:
  - Completed case plan
  - CWS/CMS contact narrative
  - Completed SDM tools
- ❑ Reflect on some of the skills you used during the case planning meeting:
  - Provide an example of a strength-based question(s) used in family meeting.
  - Provide an example of a solution-focused question used in the family meeting.
  - Provide an example of strategies and language used to help the family be engaged in the case plan development.
- ❑ Reflect on the meeting and think about:
  - What worked well?
  - What are some possible upgrades?
  - Are there any next steps to support your learning and professional development?
- ❑ Review completed case plan with children (if not present), parents, safety network, and tribe. Ensure that the parent/caregiver(s) sign the completed case plan.
- ❑ Complete the Social Worker **Case Planning and Service Delivery** survey:
  - [https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV\\_40b3VOVI3uLldHv](https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_40b3VOVI3uLldHv)