

Monitoring and Adapting Field Activity

Collaborative Assessment, Planning, and Support: Case Plan Update

ACTIVE CASE

Select an active case for which a team meeting to discuss a case plan update 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: Case Plan Update (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.
- K2.** The trainee will be able to identify the purpose of utilizing the appropriate SDM tools when updating the case plan to assess the parent/caregiver's ability to meet case plan objectives.
- K3.** The trainee will be able to identify engagement strategies for monitoring/adapting a case plan in full partnership and collaboration with the family, safety network, and tribe.
- K4.** The trainee will be able to identify the behaviors of the parent/caregiver which show their protective capacity and how they have demonstrated acts of protection over time.

Skill

- S1.** The trainee will use behaviorally specific language when discussing case plan progress with the family and the safety network.
- S2.** The trainee will address key issues, (as applicable) during the case plan update meeting, using understandable language. Key issues include, but are not limited to: behavior change, visitation, placement stability, permanency (including concurrent planning), culturally responsive services, ICWA active efforts, well-being (medical, dental, educational, behavioral, and mental health needs), child and family team meetings, advocacy, use of safety plan (including any new safety threats), impact of trauma, life skills development for ILP eligible youth, and Special Immigration Juvenile Status (SIJS).
- S3.** The trainee will review the previous case plan with the safety network and make any adjustments as determined by the team. This may include updates related to:
 - The Safety Network
 - The Safety Goal
 - Permanency Goal
 - Services
- S4.** The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with the child, youth, parent/caregiver, family and tribe 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 appreciate 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 seek to be transparent when discussing risk, safety, and the role of the court with the family and their team.

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

Activity

Practice Area: Monitoring and Adapting

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, 12 (a-h)

Estimated Time Required: 3 hours

Related eLearning/classroom:

- Monitoring and Adapting: Supporting Safety, Permanency, and Well-being
- Placement
- Managing the Plan: Supporting Safety, Permanency, and Well-being

Description of Activity:

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

This activity is designed for case plan update 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 a team meeting for the purpose of bringing the safety network together to update the case plan. Some of the case planning and service delivery activities that may have occurred prior to the case plan update meeting with the safety network include, but are not limited to:

- 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 monitor the family's progress towards meeting the safety goal

- Referrals to culturally responsive services and community-based supports
- Gathering reports and information from service providers and the members of the safety network
- Assessing with the family and other members of the safety network the specific actions and strategies that have been used to provide safety and support the well-being of the family since the case plan development or last case plan update

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 plan update 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 update with the family?
- ☐ Discuss the family's progress toward meeting the safety goal. Some considerations for discussion include, but are not limited to:
 - Review applicable SDM Tools
 - Review the previous case plan and progress towards:
 - Behavior changes
 - Addressing underlying needs & trauma
 - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
 - Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
 - Relative or NREFM placement (if applicable)
 - Legal timeframes/statutory timelines & recommendations
 - Update safety networks & their commitment to family success during and after CWS involvement
 - Reports and information from service providers and the members of the safety network regarding the family and child's progress
 - Continued self-assessment of social worker bias and identification/implementation of strategies to address bias
- ☐ Review the prior minute order with the social worker

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
- ❑ 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?
- ❑ Discuss the family's progress toward meeting the safety goal. Some considerations for discussion include, but are not limited to:
 - Review applicable SDM Tools
 - Review the previous case plan and progress towards:
 - Behavior changes
 - Addressing underlying needs & trauma
 - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
 - Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
 - Relative or NREFM placement (if applicable)
 - Legal timeframes/statutory timelines & recommendations
 - Update safety networks & their commitment to family success during and after CWS involvement
 - Reports and information from service providers and the members of the safety network regarding the family and child's progress
 - Continued self-assessment of social worker bias and identification/implementation of strategies to address bias
- ❑ Review the prior minute order with the field advisor

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 the updated case plan objectives and services are related to the safety threat(s) and reason for the family's involvement with child welfare services, with a focus on MSLC
- ❑ Observe the social worker's ability to:
 - Engage the family team around the initial Case Plan in the following areas:

- What were the worries?
- What worked well?
- What are the next steps?
- Engage the family team in difficult conversations around any/all differences in the family and agency point of view on progress
- Promote consensus building
- Facilitate dialogue which considers alternative solutions
- Explain current legal and/or agency status and timelines
- Elicit and honor the family's voice and choice
- Work with the family team to create Case Plan adjustments which could include:
 - S.M.A.R.T objectives
 - Safety Network members and their roles including supporting long term safety
 - Services
- Manage conflict which may arise
- Mitigate personal bias or other concerns previously identified by the trainee or help to ensure those things do not impact the family

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 the family's progress toward meeting the safety goal.
 - What's working well?
 - What are they worried about?
 - Are there any barriers to meeting the case plan goals?
- ❑ Review the family's progress toward case plan goals, which would include:
 - Behavior change for parents
 - Behavior change for child
 - Child safety
 - SDM tools and risk re-assessment
 - Visitation
 - Permanency or concurrent plan
 - Safety network
 - Are they following through?
 - Any new members or did a previous member leave?
 - Are network members' commitments long-term or temporary?
 - Progress and challenges with services, highlighting areas of strength and growth for the family
 - What steps have been taken by the parents to demonstrate acts of safety?
 - Anything that should be added or removed from the case plan?
- ❑ Check with the safety network about their willingness/confidence/capacity to continue being involved in the safety planning
- ❑ During the facilitated meeting continually check in to ensure there is consensus and understanding about the plan.
- ❑ Set new case plan goals with the team based on MSLC and the safety goal for the family.
- ❑ Discuss the current legal and/or agency status. Review the minute order with the family.
- ❑ Utilize strategies to defuse conflict if/when it arises

- ❑ 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:
 - What was the process of identifying new safety network members or making updates to 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
 - Do the case plan updates reflect the current underlying needs and long-term goals of the family?
- ❑ 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 updated case plan which was developed CWS/CMS
- ❑ Discuss and provide feedback about the contact narrative
 - Language/terminology used
 - Accuracy
- ❑ Identify next steps: new service referrals, visitation schedule, additional contacts regarding safety network, reports from service providers and service providers. Check in regarding when next court report is due and what is needed. Close the feedback loop to ensure all team members are aware of the updated case plan.

Social Worker Responsibility:

- ❑ Create the updated 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 updated 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 update.
- ❑ 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.
- ❑ In a follow up meeting with family obtain signatures on the case plan.
- ❑ Follow up on any next steps identified with the field advisor.