

## Transition Field Activity

### Collaborative Assessment, Planning, and Support: Transition Case Plan Update

#### **ACTIVE CASE**

#### **OBSERVATION**

Identify a case for which a team meeting to discuss a case plan update related to a transition is needed or scheduled. The trainee will consult with the assigned social worker and field advisor about the appropriateness of observing the meeting. If appropriate, the social worker will obtain permission from the family for the trainee to observe the meeting. (Note: This option is intended **ONLY** for trainees without access to a case/caseload for which a case planning team meeting is needed or would be part of the day-to-day case planning and service delivery practices.)

#### *Learning Objectives*

##### **Field Activity: Collaborative Assessment, Planning, and Support: Transition 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 or closing the case.
- K3.** The trainee will be able to identify engagement strategies for monitoring/adapting a case plan and planning for a transition in full partnership and collaboration with the family.
- K4.** The trainee will be able to identify the benefit of planning with a family for long-term safety.

##### **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 seek to be transparent when discussing risk, safety, and the role of the court with the family and their team.

**V2.** The trainee will support affirming the unique strengths, needs, life experiences, and self-identified goals of each child, youth, young adult, family, and tribe.

**V3.** The trainee will adopt a respectful, empathic, and strength-based approach to working with a family and their team to develop and implement a transition plan of each child, youth, young adult, family, and tribe.

### **Activity**

**Practice Area:** Transition

**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), 13 (a-b)

**Estimated Time Required:** 3 hours

**Related eLearning/classroom:**

- Case Closure and After Care Plans
- After 18
- Transition Practice

### **Description of Activity:**

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

This activity is designed for case plan update development when a child or family is experiencing a transition within the child welfare system or to permanency. 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 transition case plan update meeting with the safety network include, but are not limited to:

- Working with the youth, family, and tribe to identify safety network members
- Meeting with individual members of the safety network to gather their input regarding the youth and family's strengths and what is needed to provide ongoing safety for the child or youth
- 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 youth, 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 youth and family since the case plan development or last case plan update

### Before the practice opportunity

#### Field Advisor Responsibility:

- ❑ Work with the trainee to identify a case for which a team meeting to discuss a case plan update related to a transition is needed or scheduled. The field advisor may need to contact other unit supervisors or social workers to identify a case.
- ❑ Once a case has been identified for this activity, arrange a brief meeting with the assigned social worker to review the purpose of the trainee's observation.
- ❑ Work with the assigned social worker to obtain permission from the family for the trainee to observe the meeting.
- ❑ Once the family has given permission for trainee to observe the meeting, work with the assigned social worker and trainee to set up a brief meeting to discuss important background information. The field advisor will help guide the discussion with both the trainee and assigned social worker present. Some information to discuss includes:
  - Purpose of the team meeting
  - What role will the social worker be playing in the meeting (facilitator or participant)?
  - Discuss with the social worker who the family has identified as their circle of support and/or safety network. Who is anticipated to participate in the team meeting?
  - Discuss with the social worker how the family's culture and trauma history may have an impact on the meeting. How has the social worker explored this with the family?
  - How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meetings.
  - Discuss documents, materials, or other information that may be helpful for the trainee to review prior to the meeting to help better understand the family's history and current circumstances. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.
    - Review the previous case plan and progress towards:
      - Behavior changes (if applicable)
      - Addressing underlying needs & trauma

- Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified (if applicable)
- 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)
- Reports and information from service providers and the members of the safety network regarding the family and child's progress
- Current minute orders

### **Social Worker Responsibility:**

- ❑ In partnership with the field advisor identify a case for which a team meeting to discuss an initial case plan is needed or scheduled.
- ❑ Once the family has given permission for trainee to observe the meeting, participate in a brief meeting with the field advisor and assigned social worker to become more familiar with the case to be observed. The field advisor will facilitate the discussion. The field advisor may ask questions about:
  - Purpose of the team meeting
  - What role will the social worker be playing in the meeting (facilitator or participant)?
  - Discuss with the social worker who the family has identified as their circle of support and/or safety network. Who is anticipated to participate in the team meeting?
  - Discuss with the social worker how the family's culture and trauma history may have an impact on the meeting. How has the social worker explored this with the family?
  - How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meeting.
  - Review documents, materials, or other information recommended by the assigned social worker in preparation for the meeting. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.
    - Review the previous case plan and progress towards:
      - Behavior changes (if applicable)
      - Addressing underlying needs & trauma
      - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified (if applicable)
      - 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)
      - Reports and information from service providers and the members of the safety network regarding the family and child's progress
      - Current minute orders

### During the practice opportunity

#### Field Advisor Responsibility:

- ❑ The Field Advisor has no “During the Activity” responsibilities.

#### Social Worker Responsibility:

- ❑ Observe the team meeting and complete the observation worksheet.
- ❑ Reminder: The observer does not participate in the meeting, ask questions, or provide input about the case plan goals or objectives. ***You are just a fly on the wall! You can be seen but not heard 😊.***

### After the practice opportunity

#### Field Advisor Responsibility:

- ❑ Debrief with the trainee regarding the meeting process.
- ❑ What are some of the things the trainee noted on the observation worksheet?
- ❑ Ask the social worker what is one thing that he/she would like to try the next time he/she facilitates or participates in a team meeting related to case planning?

#### Social Worker Responsibility:

- ❑ Discuss the completed observation worksheet with the field advisor.
- ❑ Reflect on what worked well for the family during the meeting. Discuss strategies that the social worker used to engage the family in the discussion about case planning.
- ❑ Reflect on one thing that you would like to try when you facilitate or participate in a team meeting related to case planning in the future?

**Collaborative Assessment, Planning, and Support: Transition Case Plan Update**  
**OBSERVATION WORKSHEET**

**Prior to observing the team meeting, check with the social worker to make sure that the family has given permission for you to attend the meeting. The notes you take on this worksheet are about the meeting process and should not contain any identifying information about the family or the social worker.**

Question	Trainee Notes
Did the meeting include a discussion about what the family, the safety network, and the agency see as working well (strengths) for the child/youth/family? If yes, describe how this was done?	
Did the meeting include a discussion about what the child/youth/family, the safety network, and the agency are worried about (concerns/needs)? If yes, describe how this was done?	
Were any SDM tools used in the meeting? If yes, describe how SDM tools were discussed with the child/youth/family.	
Describe how the family's circle of support/safety network was engaged in the transition planning for the child/youth/family.	
Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the transition planning process.	
How will the updated case plan reflect the child/youth/family's needs in the future? What were some of the critical issues discussed related to transition?	
<p>If you had to identify a "rock star" moment in the meeting, what would it be? What did the person do to make it a "rock star" moment?</p> <p><small>(A "rock star" moment is something that went really well. In this case, we would like you to identify something that someone in the meeting did which demonstrated best practice.)</small></p>	
If you had to identify an opportunity for an "upgrade" during the meeting, what would it be? What are some of your thoughts about what could have been done differently?	
Overall, do you think the meeting goal was met? Why or why not?	