

# Activity Workbook: Case Planning in a Team Setting

## Case Planning in a Team Setting—Preparing the Team: Handout 1 (Role Play #1)

**Observer Role:** After the role play is completed, be prepared to give feedback for those participants who were in the Social Worker role on:

1. Was the purpose of the meeting clearly explained?
2. Were the following topics clearly explained:
  - a. Full disclosure
  - b. Concurrent Planning
  - c. Definition of permanency clearly explained?
  - d. Reasonable efforts? If ICWA applies, active efforts?
  - e. Structured Decision Making Tools, specifically the FSNA?
3. Was there an inquiry made as to the meeting participant's ideas related to the priority areas, strengths and needs of the family?
4. Was there an inquiry made as to potential team members? What tools if any, were demonstrated?
5. Strengths—What did the social workers do well?
6. Upgrade—One or two suggestions for the social worker?

## Case Planning in a Team Setting: Handout 2a

**Topic Area:** Facilitation Tips—Techniques used during teaming meetings to increase partnership, consensus and shared decision making.

**Observer Role:** After the role play is completed, be prepared to give feedback for those trainees who were in the Social Worker role: Were there any examples of reframing actions and/or behaviors as meeting underlying needs, normalizing feelings or behaviors, etc.?

1. Was the social worker able to help specific team members to identify conflict or differing ideas?
  
  
  
  
  
  
  
  
  
  
2. Did the social worker promote consensus?
  
  
  
  
  
  
  
  
  
  
3. Was the social worker able to keep the team focused on group goals?
  
  
  
  
  
  
  
  
  
  
4. Did the social worker help team members explore the facts and preferences underlying their alternative viewpoints and opinions instead of focusing on personality conflicts or personal differences?

5. Was culture discussed and in what context? Were there conflicting cultural perspectives? (Culture is broadly defined to include, but is not limited to: race, ethnicity, LGBTQ, socioeconomic class, education, military life, etc.)
6. Were all team members encouraged to participate? (Were the perspectives of all trainees sought and included about worries, concerns and risk to the children as well as strengths and acts of protections?) What about the child's perspective?
7. Were potential resources explored that would help shape a culturally relevant case plan?
8. Strengths—What did each of the social workers do well?
9. Upgrades—One or two suggestions for the social worker?

## Case Planning in a Team Setting: Handout 2b

**Topic Area:** Values/Beliefs - our ideals related to case planning in team meetings.

**Observer Role:** After the role play is completed, be prepared to give feedback for those trainees who were in the Social Worker role:

1. Did the social worker demonstrate viewing the family as an expert on themselves?
  
  
  
  
  
  
  
  
  
  
2. Was the child included as a partner in assessment and safety planning?
  
  
  
  
  
  
  
  
  
  
3. Did the social worker demonstrate in action or words that “all families have strengths”?
  
  
  
  
  
  
  
  
  
  
4. Did the social worker demonstrate in action or words that “families can make well-informed decisions about keeping their children safe”?
  
  
  
  
  
  
  
  
  
  
5. Did the social worker demonstrate in action or words that the family can define their own members to include more than the primary birth family?
  
  
  
  
  
  
  
  
  
  
6. Was culture discussed and in what context? Were there conflicting cultural perspectives? (Culture is broadly defined to include, but is not limited to: race, ethnicity, LGBTQ, socioeconomic class, education, military life, etc.)

7. Were all team members encouraged to participate? (Were the perspectives of all trainees sought and included about worries, concerns and risk to the children as well as strengths and acts of protections?) What about the child's perspective?
8. Were potential resources explored that would help shape a culturally relevant case plan?
9. Strengths—What did each of the social workers do well?
10. Upgrades—One or two suggestions for the social worker?

## Case Planning in a Team Setting: Handout 2c

**Topic Area:** Case Planning Concepts—elements that should be reflected in all case plan documents.

**Observer Role:** After the role play is completed, be prepared to give feedback for those trainees who were in the Social Worker role:

1. Is the plan that the social worker developed with the team customized to the family, their culture, community, and Tribe and include utilization of the appropriate SDM tools (specifically the FSNA in this vignette)?
2. Does the plan include input from the family?
3. Are the action steps included in the plan S.M.A.R.T?
4. Does the plan include key safety, risk, strengths and needs of each family member?
5. Has a concurrent plan been identified?
6. Was culture discussed and in what context? Were there conflicting cultural perspectives? (Culture is broadly defined to include, but is not limited to: race, ethnicity, LGBTQ, socioeconomic class, education, military life, etc.)

7. Were all team members encouraged to participate? (Were the perspectives of all trainees sought and included about worries, concerns and risk to the children as well as strengths and acts of protections). What about the child's perspective?
8. Were potential resources explored that would help shape a culturally relevant case plan?
9. Strengths—What did each of the social workers do well?
10. Upgrades—One or two suggestions for the social worker?

## Case Planning in a Team Setting Handout 2d

**Topic Area:** Teaming Tools—visual aids used with family members that help identify potential team members, identify priority areas for assessment and safety planning, and elicit the voice of children and/or youth.

**Observer Role:** After the role play is completed, be prepared to give feedback for those trainees who were in the Social Worker role:

1. Did the social worker demonstrate the use of Circles of Support, Eco-maps and/or a Genogram as a way to identify additional team members? Or, was there inferences made that one of these tools was used in preparation for the meeting?
2. Did the social worker demonstrate the use of the Three Questions in conducting a balanced assessment and identifying priority areas for assessment?
3. Did the social worker discuss or mention having used either the Three Houses or Safety House as a way to elicit the voice of the child in assessment and safety planning?
4. Was culture discussed and in what context? Were there conflicting cultural perspectives? (Culture is broadly defined to include, but is not limited to: race, ethnicity, LGBTQ, socioeconomic class, education, military life, etc.)
5. Were all team members encouraged to participate? (Were the perspectives of all participants sought and included about worries, concerns and risk to the children as well as strengths and acts of protections). What about the child's perspective?



6. Were potential resources explored that would help shape a culturally relevant case plan?

7. Strengths—What did each of the social workers do well?

8. Upgrades—One or two suggestions for the social worker?