

COMMON CORE 3.0 FOR SOCIAL WORKERS

200 Level Managing Change Knowledge and Skills Reinforcement Lab

Polk/Hernandez Family Team Meeting – Activity Instructions

Purpose of activity:

To give trainees a chance to practice new tools and strategies for teaming with families while monitoring and adapting the case plan.

Purpose of the meeting:

A Family Team Meeting is being held for the Hernandez/Polk family following the 387 petition hearing to discuss the current needs of the children in order to update the case plan and ensure there is a transition plan that will support the safety, permanency, and well-being of the children, including a plan to maintain connections with the parents and support network. In attendance are: Samantha, Ms. Hernandez, Mr. Polk, Aunt Leann, Pastor John, the social worker and social worker's supervisor.

Summary of goals:

1. Discuss the current needs of the children based on an updated SDM Family Strengths and Needs Assessment to inform the updated case plan with the goal of a permanent plan with resource parent Aunt Leann
2. Develop a trauma – informed visitation plan in order to maintain important familial and community connections for the children while ensuring their physical and emotional wellbeing.

Members of the team / support network:

Bill (social worker), Mary (supervisor), Ms. Hernandez (mom), Mr. Polk (dad), Samantha (daughter), Willy (son), Ms. Lacey, Aunt Leann, Grandma Beverly, Uncle Sal, Coach Rebecca, Mr. Hopkins, Ms. Lakota, Ms. Powell, Pastor John.

Roles:

1. Social Worker (Bill) – Facilitator of meeting
2. Social Worker Supervisor (Mary) – Scribe of meeting
3. Gloria, Mother (age 33)
4. William, Father (age 35)
5. Samantha, daughter (age 15)
6. Resource parent, Aunt Leann
7. Uncle Sal (support network)
8. Observer: Voices of Structured Decision Making, Trauma Informed Practice, Cultural humility, Best Practices

***Not in attendance (Social worker has interviewed them ahead of time and will present their voices at the meeting):**

Grandma Beverly, Coach Rebecca, Pastor John, Ms. Lakota, Ms. Powell, Mr. Hopkins.

Description of activity:

- Participants will team with the family during the activity utilizing updated information about the Polk/Hernandez family in preparation for updating the visitation and case plan.
- Each Family Teaming Meeting will include about 8 people.

- Each person will rotate practicing facilitating part of the interaction with the family (as the social worker). When not facilitating, they will play one of the other roles on the team.
- Have each group determine which person will play the social worker first, second, third, fourth and fifth; and have them identify what role they will play when they are not the social worker and write their role on a name tent.
- **Refer to the following associated handouts for review and preparation of the activity.**

Associated handouts:

Supplemental handout:

- Polk/Hernandez Activity Instructions (this handout: includes roles and agenda with social worker roles)

Trainee guide:

- Polk / Hernandez vignette (page 17)
- Family Team Meeting Agenda (page 37)
- Safety Planning Tool – Teaming Activity Notes (page 38)
- Family Team Meeting – Observer Worksheet (page 39)

For reference only – Trainee guide:

- Helpful types of questions for finding solutions (page 23)
- SDM & Ecomap activity worksheet (page 27)
- Polk / Hernandez Ecomap (page 29)
- Communication skills for effective facilitation (page 40)

Polk/Hernandez Family Team Meeting Scenario

A Family Team Meeting is being held for the Hernandez/Polk family following the 387 petition hearing. The purpose is to discuss the recommendations of no services and the permanent plan for the children with the resource parent Aunt Leann. In addition, to assess the current needs of the children and establish a visitation plan for the parents and support network as part of the updated case plan for the children.

Members of the team / support network:

Bill (social worker), Mary (supervisor), Ms. Hernandez (mom), Mr. Polk (dad), Samantha (daughter), Willy (son), Ms. Lacey, Aunt Leann, Grandma Beverly, Uncle Sal, Coach Rebecca, Mr. Hopkins, Ms. Lakota, Ms. Powell, Pastor John.

In attendance at the meeting: Bill (social worker), Mary (supervisor), Ms. Hernandez (mom), Mr. Polk (dad), Samantha (daughter), Resource parent Aunt Leann, Uncle Sal

Not in attendance (Social worker has interviewed them ahead of time and will present their voices at the meeting): Grandma Beverly, Coach Rebecca, Pastor John, Ms. Lakota, Ms. Powell, Mr. Hopkins.

Polk/Hernandez Family Team Meeting Roles

Bill, Social Worker, Age 23, Caucasian

You are the family reunification worker; you have an established relationship with the family and will continue to support them in this transition. You know that the family members are all distraught over what has happened. You are also feeling overwhelmed, questioning your decision making, and dealing with your own reactions to the family not being able to

Revised: 12/31/17

successfully reunify. You have consulted with your supervisor ahead of time and feel prepared to facilitate the Family Team Meeting. The purpose of the meeting is to develop a visitation plan for the parents and to assess and discuss the need to adapt the children's case plan goals and objectives based on the SDM Strengths and Needs Tool and the Ecomap you developed with Willy and Samantha.

You have several questions for the family and their network, such as:

1. What support system does the family have in place and how will they support the family to ensure the children's safety?
2. How can we continue to honor you as parents as we move forward in recommending the children be placed permanently with Aunt Leann?
3. How can the team best support the children in this transition?

Mary, Social Work Supervisor, Age 52, Hispanic

You are the supervisor of Bill, the family reunification worker. Bill has shared many details with you about this family and he uses a strengths based approach with the families he works with. You have a positive working relationship with Bill and trust his judgments. You both discussed his own personal reactions to this change in direction in the case and his disappointment in the father for once again abusing the children in this way.

William Polk, Father, Age 35, African American

The father of Samantha, Willy, and Amalia, you work several odd jobs such as auto repair with your uncle and a driver for Uber. You were doing well during family reunification, parent class and substance abuse treatment. Shortly after the case went to Family Maintenance you began drinking again – only a beer or two at first, but during the last incident you had begun drinking whiskey again. The stress of not being able to provide for your family, dealing with conflicting feelings about how to raise your children, and your strong belief that kids must obey their parents or they won't make it in society led to the drinking and increased drinking. You are angry about the fact that the county wants to take your children away permanently. You feel guilty for your out of control behavior with Willy.

Gloria Hernandez, Mother, Age 33, Hispanic

The mother of Samantha, Willy, and Amalia, you are a hard worker and a loving mother, but you have past substance abuse issues and you have had issues in the past protecting Amalia from her father when he became angry with Amalia for not listening. You did well in services and were happy to see William, the father, open up to looking at his angry and dangerous reactions to the children, especially Amalia, who is very strong willed, when he drinks. You knew that William had started drinking beer again and that he was beginning to yell at the children more. You wanted to ask for help from your social worker, Bill, as you believe he supports your family, but you didn't want to make the situation worse for William. You were hoping you could talk to him and to Uncle Sal and that he would get back on track. He had been doing so well. You appreciated Aunt Leann for caring for your children but you know that they need you now more than ever.

Samantha, Age 15

You wish you could be at home with your parents, but if you can't then Aunt Leann is where you want to be. You are happy that you are staying in the same school, as Coach Rebecca continues to be a mentor. You are mad at your mother and feel that your mother is at fault for all of this because if your mother had stayed home from work like she agreed to none of this would have happened. You are also upset that you have not been allowed to watch your siblings. You are tired of having to move and have begun to withdraw more from your friends. You have just been focusing on dance and stay in your room most of the time when you're home.

Beverly, Paternal Grandmother, Age 63

You want your son William Polk to come back and live with you. You are disappointed in what happened but also very worried about William's emotional well-being; he may give up on everything now that the kids have been taken away again. You agree that Leann should have the children because you aren't sure Gloria can handle them alone. You believe part of the problem is that William felt the need to over discipline because Gloria was too lenient with the kids. You are the pillar of your family. Everyone comes to you for advice, but you are not pushy and tend to let people make mistakes rather than force your agenda. However, you are very worried about your grandkids, your son and also Gloria. You understand the impact of trauma because you have lived through it with your own children. You don't want to see your grandchildren repeat the cycle of abuse and alcoholism you have seen with your own husband and son William.

Uncle Sal, Paternal Uncle, Age 32

As the brother of William Polk, you have been his primary support. William really looks up to you even though you're his younger brother. You have been in recovery for eight years. Although you're devastated by the children being removed again and about William's relapse, you believe strongly that families need to stay together and you know that William can continue to improve. You do support the children being taken out of the home and placed with your sister Leann, but you don't think they should be adopted.

Leann, Paternal Aunt and resource parent, Age 38

You are William Polk's sister. Following the original Juris/Dispo hearing, Willy and Amalia were placed with you. You are more than willing to have the kids with you and will provide permanency for them if that is what you have to do to keep them from being in the "system." You are angry with your brother and can't believe he did the same thing again knowing what would happen. You support the children's mother Gloria and would like to see the kids be able to be with her, but you think Gloria needs some time to decide if she is willing to leave William. Most importantly, you will do whatever the department wants you to do to keep the kids safe and with family.

Observer

You will observe the team meeting and serve as the voice of:

- Structured Decision Making
- Trauma Informed Practice
- Cultural humility
- Best Practices

You will document your observations of the meeting on the "*Family Team Meeting – Observation Worksheet*" in the trainee guide.

Willy, Age 8: (will not be at the FTM; SW will present voice of Willy)

After his parents move, Willy had a best friend, Mitchell, who lived next door to them. Mitchell and he played baseball together, and Mitchell's dad, Jim was the coach. Willy had become very close to Jim. Willy had spent the night at their home on several occasions. Willy likes spending time with Mitchell and his family and he is worried that since his Aunt Leann lives on the other side of town he will not see them anymore. Willy loves living with his Aunt Leann. He is happy that he is going back to his old school. He misses his dad and mom a lot, but sees them sometimes. Willy thinks that if he had not gotten hit with the belt no one would have ever known and he would still be living with his parents. He feels guilty for his family not being together, but happy he helped Amalia. He is also feeling angry and has gotten into trouble at school for fighting. He is refusing to see his father at this time.

The following team members will NOT be present at the team meeting. Social worker interviewed them prior to the meeting and can represent their voice / perspective during the meeting:

Ms. Lacey, Day Care Provider

As Amalia and William's daycare provider, you can continue to provide daily childcare for Amalia until 5:30pm and for Willy after school until 5:30pm, Monday through Friday. You have seen a lot of strengths in the children and are invested in their well-being because you have been a part of their life for quite some time.

Mr. Hopkins, Education Liaison from School District

The educational liaison for the school district, you have been working with the social worker during the life of this case. The children have already changed schools once and you are concerned about their ongoing educational needs. Willy has been acting out at school recently and got in a fight last week. You want to be sure the kids can stay in their current schools and you can offer transportation assistance.

Ms. Lakota

A church friend of Ms. Hernandez, Ms. Lakota is very proud of Ms. Hernandez. They swap recipes and have learned together to make delicious pupusas. Ms. Lakota used to be a drug and alcohol counselor and is open to helping the community. She does not believe in physical discipline and does not support Mr. Polk. She believes Ms. Hernandez needs to leave him. She is willing to support her.

Ms. Rebecca, Samantha's Dance Coach

Samantha's dance coach, Ms. Rebecca will work with the school to help Samantha to continue to get a scholarship for dancing. She thinks Samantha is good enough to attend State trials this year and perhaps get a scholarship for Juilliard. Ms. Rebecca is a retired Olympian and sees promising talent in her student.

Ms. Powell, neighbor

You have always been close with Samantha and are willing to help with all three kids and would like to maintain a relationship with them.

Pastor John and church support

You are very busy with a large congregation, but there is a large support group at church that is committed to supporting Ms. Hernandez whenever she needs it.

Family Team Meeting Agenda with Social Worker Roles

AGENDA FOR Social Worker #1	POLK/HERNANDEZ MEETING	FACILITATION TIPS:
1. Introductions	<p>Time: 5 minutes</p> <p>Skill: framing, engaging family and team input</p> <p>The first part of the interaction will set the tone for the group and shape the experience people have of you as the social worker. You want to leave them with a sense that you are confident, calm, upbeat, warm and able to manage the meeting. Your ability to keep the group moving through its introductions will show the family that they can count on you to be efficient, focused, neutral and competent in your role. From the beginning you are modeling <i>transparency</i>.</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Begin the meeting by offering a warm welcome 2. Introduce yourself as the Facilitator and tell them you're going to: <ul style="list-style-type: none"> • Describe the agenda; • Say a few words about your role; • Ask them to introduce themselves. 3. Briefly review the agenda (use handout as reference) 4. Briefly describe your role: <ul style="list-style-type: none"> • To help the group talk and make decisions by assisting with the process; • You are neutral and here to support an inclusive, participatory process; • You won't be giving advice or opinions about the content of the group's discussion 5. Ask for brief introductions and check in: e.g., I'd like everyone to take about 30 seconds to just briefly say: <ul style="list-style-type: none"> • who you are, • what your role is with the family, • what you hope to get out of today's meeting, • Any questions about the meeting 	<p>Be transparent about the process: Provide William and Gloria and natural supports with information about the purpose of the meeting, how long it will last, agenda and information about your role, concurrent planning and the definition of permanency if needed and the agreed-upon decision-making process (strive for consensus).</p> <p>From the beginning of the meeting be mindful of what power dynamics/imbbalances are present that need to be made explicit?</p>

2. Purpose of this Meeting:	<p>Time: 5 minutes</p> <p>Skill: framing, establishing goals of meeting, encouraging family input</p> <p>Steps:</p> <p>1. Present the general purpose of the meeting: To discuss the current needs of the children in order to update the case plan and ensure there is a transition plan that will support the safety, permanency, and well-being of the children, including a plan to maintain connections with the parents and support network.</p> <p>Summary of goals:</p> <ul style="list-style-type: none"> ➤ Discuss the current needs of the children based on an updated SDM Family Strengths and Needs Assessment to inform the updated case plan with the goal of a permanent plan with resource parent Aunt Leann ➤ Develop a trauma-informed visitation plan in order to maintain important familial and community connections for the children while ensuring their physical and emotional well-being. ➤ Check for understanding and agreement 	<p>Ensure there is agreement about:</p> <p>What will the group be doing together?</p> <p>What do people want to walk away with?</p> <p>How to do this:</p> <p>Describe desired outcomes and process concretely.</p> <p>Ask if people have questions or different understanding.</p>
3. Group Agreements/ Confidentiality	<p>Time: 5 minutes</p> <p>Skill: Reflective listening, clarifying, promoting consensus, encouraging shared decision making</p> <p>Agreements give the group an opportunity to identify what they need from themselves and others to fully participate in the meeting.</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Ask the group to generate agreements they want to add regarding expectations of self and others that will support their full participation. 2. Discuss the boundary between confidentiality and mandated reporting. 3. Document the agreements on scratch paper 4. Transition roles to the next social worker 	<p>Establish working agreements:</p> <p>How will we work together in this meeting?</p> <p>What agreements are needed for effective dialogue?</p> <p>How to do this:</p> <p>Be prepared with suggested agreements.</p> <p>Important agreement:</p> <p>The family should be provided the opportunity to speak first and last after each part of the agenda if they choose to do so. (shifting power dynamic)</p> <p>What is happening outside the room that pulls attention away from what we are doing together?</p>

AGENDA FOR Social Worker #2	POLK/HERNANDEZ MEETING/VISIT	FACILITATION TIPS:
4. Family strengths	<p>Time: 15 minutes</p> <p>Skill: discussing culture, gathering ideas, family input, reflective listening, inviting alternative points of view (Use the “Safely Planning Tool – Teaming Activity Notes” handout to document working/strengths in that section).</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Ask family members to talk about their strengths. Ask further about strengths that lift-up behavioral changes they have made to enhance their children’s safety, permanence or wellbeing. 2. Ask about what is working well with their family; their children; their progress toward behavioral change and about the support they are getting from community and their support network. 3. When the family is done, ask any other participants in the meeting to do the same. 4. Share what you, as the social worker see as strengths, things that are working for the family that have not been discussed. 5. Maybe use a scaling question to have participants rate themselves on their progress. Offer your answer and talk about what it would look like to move up by one. 	

AGENDA FOR Social Worker #3	POLK/HERNANDEZ MEETING/VISIT	FACILITATION TIPS:
5. Challenges and Worries	<p>Time: 15 minutes</p> <p>Skill: reflective listening, discussing culture, gathering ideas, family input, reflective listening, inviting alternative points of view</p> <p>(Use the “Safely Planning Tool – Teaming Activity Notes” handout to document the challenges/worries in that section).</p> <ol style="list-style-type: none"> 1. Ask family members to talk about their challenges and worries. Ask further about barriers to any behavioral changes they need to make to enhance their children’s safety, permanence or wellbeing. 2. Ask about what is worrying them about their family; their children and about the support they are getting from community and their support network. 3. When the family is done, ask any other participants in the visit/conversation to do the same. 4. Share what you, as the social worker, see as challenges or worries that have not been discussed. Share who else may be worried about some of these issues. (E.g. Court, CASA, therapist etc.) 5. Possibly use an exception question to have participants talk about a time when one of the worries could have happened but did not and what they did to prevent it or mitigate it. 6. List responses in the “Worries” column of the safety planning tool. 	

AGENDA FOR Social Worker #4	POLK/HERNANDEZ MEETING/VISIT	FACILITATION TIPS:
6. Action Planning or Next Steps	<p>Time: 15 minutes</p> <p>Skill: reflective listening; using the SMART tool, solution focused inquiry, promoting consensus, customizing the plan inclusive of family, engaging key safety, risk, strengths and needs of each family member, concurrent planning, active and reasonable efforts</p> <p>(Use the “Safely Planning Tool – Teaming Activity Notes” handout to document the Action/Next Steps in that section).</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Where can the team make a plan of action? What ideas have come up during the conversation? 2. Explain the goal of the visitation and family time plan in terms of ensuring safety. 3. Ask each person, “what step can you identify that will demonstrate safety in relationship to visitation?” 4. Help the family develop goals that are specific, measurable, attainable, relevant, and time-based (SMART). 5. Document their responses at your tables 6. Check for clarity about the way the items are written 7. Ask the team scaling questions for confidence, willingness and capacity. Discuss what would support them in taking the number up by one. What would take it down by one and what will do if that starts to happen? 8. Make connection between action steps and how they connect to previous assessments, case plans, court orders and safety goals etc. 9. Discuss any reasonable or active efforts that the agency is committing to do to support the plan and document those as well. 	<p>Encourage the group to use the information from the Safety Planning Tool to develop next steps.</p> <p>Refer to the purpose of the meeting if necessary.</p> <p>Have a copy of the Ecomap for reference and use to assess additional supports if needed.</p>

AGENDA FOR Social Worker #5	POLK/HERNANDEZ MEETING	FACILITATION TIPS:
8. Next Steps, Feedback and Next Meeting	<p>Time: 10 minutes</p> <p>Skill: promoting consensus</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Ask group members, based on what's going on and what their action plans are, when they would like to meet again. 2. As people suggest days and times, ask the other group members if the times would work. 3. When someone suggests a meeting time that works for everyone, ask the family to endorse it as a decision. 4. Gather feedback from participants about how the meeting went. 5. Ensure that if there are people missing from the team, there is someone assigned to follow up with them and ensure they have the information necessary to attend the next meeting. <p>Feedback and Debrief</p> <p>This is the counterpart to "check-in" – it offers the group a way of closing its meeting on a strong note and helping members shift gears to the next thing they have to do.</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. On a chart piece of paper, create two columns; one is marked with a plus sign and the other a delta sign 2. Elicit feedback by asking the group: what worked and what could change? 3. Chart all responses and like a brainstorm, ask the group not respond; this is not a time for comments, just gathering ideas. 4. Close the meeting in a way that is meaningful to the group; one possibility is to ask that each person say one word that describes how they are doing. 5. Be sure to offer your own check-out last. 6. Thank everyone for coming and tell them you look forward to seeing them at the next meeting/visit – and state the date, time and place. 	
9. Debrief the Activity ALL GROUP MEMBERS	<p>Time: 10 minutes</p> <p>Skill: reflective listening</p>	<p>Why do this?</p> <p>Elicit feedback on the meeting process for additional learning and practice improvement.</p>