Common Core 3.0

Case Planning in a Team Setting

Trainer's Guide

CDSS

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Acknowledgements

California's Common Core Curricula for Child Welfare Workers is the result of the invaluable work and guidance of a great many people throughout the child welfare system in California and across the country. It would be impossible to list all of the individuals who contributed, but some groups of people will be acknowledged here.

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In addition to CDOG, a Common Core 3.0 subcommittee comprised of representatives from the RTAs, the Resource Center for Family Focused Practice, and counties provided oversight and approval for the curriculum development process.

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California's child welfare system greatly benefits from this collaborative endeavor, which helps our workforce meet the needs of the state's children and families.

The Children's Research Center provided technical support as well as The Structured Decision Making System that includes the SDM 3.0 Policy and Procedure Manual and Decision Making Tools. These resources are used in compliance with CRC copyright agreements with California. Additionally, content in this curriculum has been adapted from CRC's SDM 3.0 classroom curriculum to meet the training needs in California.

In compliance with the Indian Child Welfare Act (1978) and the California Practice Model, social workers must identify American Indian/Alaska Native children in the system. For an overview of *Implementing the Indian Child Welfare Act* view: https://www.youtube.com/watch?v=BIQG65KFKGs

The curriculum is developed with public funds and is intended for public use. For information on use and citation of the curriculum, please refer to: https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf

FOR MORE INFORMATION on California's Core Curricula, contact California Social Work Education Center (CalSWEC) at calswec_rta_cc@berkeley.edu.
For the latest version of this curriculum, please visit the CalSWEC website:
http://calswec.berkeley.edu

Introduction

Please read carefully as a first step in preparing to train this curriculum.

> **IMPORTANT NOTE: Each curriculum within the Common Core series is mandated and standardized for all new child welfare workers in the state of California. It is essential that all trainers who teach any of the Common Core Curricula in California instruct trainees using the standardized Training Content as provided. The training of standardized content also serves as the foundation for conducting standardized testing to evaluate and improve the effectiveness of new worker training statewide.**

GENERAL INFORMATION

Common Core curriculum and training for new child welfare workers in California is designed to be generalizable across the state, cover basic child welfare knowledge and skills and is important for all CWS positions within an agency.

The Common Core Curriculum model is designed to define clearly the content to be covered by the trainer. Each curriculum consists of a *Trainee's Guide* and a *Trainer's Guide*. Except where indicated, the curriculum components outlined below are identical in both the Trainee's and Trainer's Guides. The Trainee's Guide contains the standardized information which is to be conveyed to trainees.

For an overview of the training, it is recommended that trainers first review the Agenda and Lesson Plan. After this overview, trainers can proceed to review the activities for each training segment in the Trainer's Guide and the Training Content in the Trainee's Guide in order to become thoroughly familiar with each topic and the training activities. The components of the Trainer's and Trainee's Guides are described under the subheadings listed below.

The curricula are developed with public funds and intended for public use. For information on use and citation of the curricula, please refer to the Guidelines for Citation:
https://calswec.berkeley.edu/sites/default/files/citation_guideline_6-2018.pdf

Please note that each individual curriculum within the Common Core Curricula is subject to periodic revision. The curricula posted on the CalSWEC website are the most current versions available. For questions regarding the curricula, contact CalSWEC at calswec_rta_cc@berkeley.edu (link sends email).

COMPONENTS OF THE TRAINER'S AND TRAINEE'S GUIDES

Learning Objectives

The Learning Objectives serve as the basis for the Training Content that is provided to both the trainer and trainees. All the Learning Objectives for the curriculum are listed in both the Trainer's and Trainee's Guides. The Learning Objectives are subdivided into three categories: Knowledge, Skills, and Values. They are numbered in series beginning with K1 for knowledge, S1 for skills, and V1 for values. The Learning Objectives are also indicated in the Lesson Plan for each segment of the curriculum.

Knowledge Learning Objectives entail the acquisition of new information and often require the ability to recognize or recall that information. *Skill Learning Objectives* involve the application of knowledge and frequently require the demonstration of such application. *Values Learning Objectives* describe attitudes, ethics, and desired goals and outcomes for practice. Generally, *Values Learning Objectives* do not easily lend themselves to measurement, although values acquisition may sometimes be inferred through other responses elicited during the training process.

Agenda

The Agenda is a simple, sequential outline indicating the order of events in the training day, including the coverage of broad topic areas, pre-tests and/or post-tests, training activities, lunch, and break times. The Agenda for trainers differs slightly from the Agenda provided to trainees in that the trainer's agenda indicates duration; duration is not indicated on the agenda for trainees.

Lesson Plan (Trainer's Guide only)
The Lesson Plan in the Trainer's Guide is a mapping of the structure and flow of the training. It presents each topic and activity and indicates the duration of training time for each topic.

The Lesson Plan is divided into major sections by Day 1, Day 2, and Day 3 of the training, as applicable, and contains two column headings: Segment and Methodology and Learning Objectives. The Segment column provides the topic and training time for each segment of the training. The Methodology and Learning Objectives column reflects the specific activities and objectives that are covered in each segment. As applicable, each activity is numbered sequentially within a segment, with activities for Segment 1 beginning with Activity 1A, Segment 2 beginning with Activity 2A, etc.

Evaluation Protocols
It is necessary to follow the step-by-step instructions detailed in this section concerning pre-tests, post-tests, and skill evaluation (as applicable to a particular curriculum) in order to preserve the integrity and consistency of the training evaluation process. Additionally, trainers should not allow trainees to take away or make copies of any test materials so that test security can be maintained.

Training Segments (Trainer's Guide only)
The Training Segments are the main component of the Trainer's Guide. They contain guidance and tips for the trainer to present the content and to conduct each Training Activity. Training Activities are labeled and numbered to match the titles, numbering, and lettering in the Lesson Plan. Training Activities contain detailed descriptions of the activities as well as step-by-step tips for preparing, presenting, and processing the activities. The description also specifies the Training Content that accompanies the activity, and the time and materials required.

Occasionally, a Trainer's Supplement is provided that includes additional information or materials that the trainer needs. The Trainer's Supplement follows the Training Activity to which it applies.

Training Content (Trainee's Guide only)
The Training Content in the Trainee's Guide contains the standardized text of the curriculum and provides the basis for knowledge testing of the trainees. Training activities are labeled and numbered to match the titles and numbering in the Lesson Plan.

Supplemental Handouts
Supplemental Handouts refer to additional handouts not included in the Trainee's Guide. For example, Supplemental Handouts include PowerPoint printouts that accompany in-class presentations or worksheets for training activities. Some documents in the Supplemental Handouts are placed there because their size or format requires that they be printed separately.

References and Bibliography
The Trainer's Guide and Trainee's Guide each contain the same References and Bibliography. The References and Bibliography indicates the sources that were reviewed by the curriculum designer(s) to prepare and to write the main, supplemental and background content information, training tips, training activities and any other information conveyed in the training materials. It also includes additional resources that apply to a particular content area. The References and Bibliography may include the following:
- All-County Letters (ACLs) and All-County Information Notices (ACINs) issued by the California Department of Social Services (CDSS);
- Legal References (as applicable); and

- General References and Bibliography

In certain curricula within the Common Core series, the References and Bibliography may be further divided by topic area.

Materials Checklist (Trainer's Guide only)
In order to facilitate the training preparation process, the Materials Checklist provides a complete listing of all the materials needed for the entire training. Multi-media materials include such items as videos, audio recordings, posters, and other audiovisual aids. Materials specific to each individual training activity are also noted in the Training Segments in the Trainer's Guide.

Posters (Trainer's Guide only)
Some curricula feature materials in the Trainer's Guide that can be used as posters or wall art.

Tips for Training this Curriculum

Common Core curriculum and training for new child welfare workers in California is designed to be generalizable across the state, cover basic child welfare knowledge and skills, and is important for all CWS positions with in an agency.

TRAINING PREPARATION

It is *required* that the trainer preview the following eLearning and/or classroom trainings:

1. Case Planning Basics eLearning
2. Concurrent Planning Introduction eLearning from the Engagement Block

It is *recommended* that the trainer preview the following eLearning(s) and/or classroom trainings pre-requisites to training the classroom:

1. Purposeful Visitation eLearning
2. Writing Behavioral Objectives classroom (a recommended prerequisite)
3. Teaming, Collaboration and Transparency classroom

It is *suggested* that you orient yourself to all the blocks in preparation for this training in order to make links and dig deeper into skill building:

1. Foundation
2. Engagement
3. Assessment
4. Case Planning and Service Delivery
5. Monitoring and Adapting
6. Transition

Contact your Regional Training Academy/UCCF for more information and to register for the eLearnings as well as to access the classroom curriculum. Visit CalSWEC website for more information at: https://calswec.berkeley.edu/programs-and-services/child-welfare-service-training-program/common-core-30

MATERIALS

This module focuses on skill building. All materials are contained within the Trainer or Trainee Guide. The goal of this training is to provide trainees with an opportunity to develop and enhance facilitation skills needed for facilitating formal and informal team meetings with the purpose of developing case plans or adjusting case plans based on changing family circumstances.

Training Preparation: Prior to the trainees entering the room, the trainer will need to post laminated posters, post chart paper, and arrange the room in a way where trainees can both see the chart paper and all other meeting trainees (horseshoe style works best).

Materials: On chart paper create the following posters and displayed around the room in the order listed below:

Poster #1—Agenda
- Purpose/Outcome

- Context
- Group Agreements
- Network
- What Is Working Well?
- What Are We Worried About?
- What Are Our Next Steps?
- Delta/Plus

Poster #2⸺Group Agreements
- Each person will speak one at a time.
- Be respectful of other people's opinions.
- This meeting is a safe place to talk. We agree that what is said in this meeting stays in this meeting.
- If we can't resolve a disagreement, we will put it in a "parking lot" and we'll see what and who we should talk further to about the disagreement.
- We will stay focused on what is best for Omar and Alejandro. We may not agree, but we will try and keep them the center of the conversation.

Poster #3⸺Purpose (on top) Outcome (middle of paper)
Purpose:
- To discuss the plan of reunification and concurrent planning.
- To discuss Omar's behaviors, ADHD and learning disabilities.
Outcome:
- An alternate plan(s) for Omar in the event he does not return home.
- A decision as to what kind of mental health trauma-informed treatment that Omar may need.

Poster #4⸺ What Is Working Well?
- Both parents have maintained sobriety for over 2 years.
- The parents have sought medical treatment to address Omar's behavior and are providing him with the prescribed medication as directed.
- The parents have a positive working relationship with the school. The parents attend parent conferences and have had phone calls with the teachers.
- The children attend school regularly.
- The children are well-cared for and supervised closely.
- The parents have attended parenting classes and have begun using the new skills they learned in class. The parents take the children at least twice a week to the park and read nightly to the children.
- There are multiple relative and community supports available to the family.
- The family has participated in cultural activities, including Tribal functions.
- Mr. Wilson has a job.

Chart Paper titled: What Are We Worried About?
- Blank chart paper underneath (perhaps two)

Chart Paper titled: What Needs to Happen Next?
- Blank chart paper with three columns
- Who? What? How will we know it worked?

Chart Paper titled: Delta/Plus
- Blank chart paper with two columns
- Left-side = delta Right-side = plus

COUNTY VARIATIONS IN PRACTICE

This module is designed to help social workers gain skills in facilitating teams, with an emphasis on family involvement in the team meeting. The trainer should be familiar with county or regional practices in teaming such as: Team Decision Making, Family Group Decision Making, Child and Family Teams, Safety Mapping, Family Centered Teaming, etc., as these teams may have specific goals to achieve. Please note, that while the curriculum focuses on formal teams, the social worker will also be teaming "informally" with the family each time he/she meets with the family. The concepts taught are transferrable to informal teaming.

USE OF TEAMING FOLLOWING THIS TRAINING

After completing the Case Planning in a Team Setting curriculum, trainees should be referred back to their county for further training and field experience in formal teams. The classroom training, they receive with this module must be reinforced with field learning, regular supervision, and mentoring. We also STRONGLY recommend that social workers participate in the relevant advanced team training to reinforce and enhance facilitation skills.

TRAINING ACTIVITIES

Because this training is activity rather than lecture based, trainers should be familiar with the family that is being presented in this module. Additional information may be found in the module: Writing Behavioral Objectives. Trainers should be prepared to address a wide variety of trainee questions in the moment relying on their professional experience. Regional Training Academies may have additional resources for preparing trainers to present this curriculum.

FAMILY-FRIENDLY LANGUAGE

Trainers are the example for modeling this for trainees. The hope is that the work is done with families, not on clients. Use words such as parents, young adults, youth, child, family…rather than clients. We want to model that families involved in child welfare services are not separate from us as social workers, but part of our community. This is the goal of the California Child Welfare Core Practice Model as well and reflects the behaviors we want to see demonstrated in social workers work with families. For more information on the Californian Child Welfare Core Practice Model, visit the CalSWEC website at http://calswec.berkeley.edu/california-child-welfare-core-practice-model-0.

SAFETY ORGANIZED PRACTICE

Some content in this curriculum was developed by the National Council on Crime and Delinquency (NCCD) and the Northern California Training Academy as part of the Safety Organized Practice (SOP) Curriculum. Please note, not all California Counties are actively practicing SOP. However, the framework, principles and concepts are integrated throughout the curriculum as tools and best practices. SOP is a collaborative practice approach that emphasizes the importance of teamwork in child welfare. SOP aims to build and strengthen partnerships with the child welfare agency and within a family by involving their informal support networks of friends and family members. A central belief in SOP is that all families have strengths. SOP uses strategies and techniques that align with the belief that a child and his or her family are the central focus, and that the partnership exists in an effort to find solutions that ensure safety, permanency, and well-being for children. Safety Organized Practice is informed by an integration of practices and approaches including:

- Solution-focused practice[1]
- Signs of Safety[2]

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[1] Berg, I.K., and De Jong, P. (1996). Solution-building conversations: co-constructing a sense of competence with clients. *Families in Society*, pp. 376-391; de Shazer, S. (1985). *Keys to solution in brief therapy.* NY: Norton; Saleebey, D. (Ed.). (1992). *The strengths perspective in social work practice.* NY: Longman.

- Structured Decision Making[3]
- Child and family engagement[4]
- Risk and safety assessment research
- Group Supervision and Interactional Supervision[5]
- Appreciative Inquiry[6]
- Motivational Interviewing[7]
- Consultation and Information Sharing Framework[8]
- Cultural Humility
- Trauma-informed practice

[2] Turnell, A. (2004). Relationship grounded, safety organized child protection practice: dreamtime or real time option for child welfare? *Protecting Children, 19*(2): 14-25; Turnell, A., & Edwards, S. (1999). *Signs of Safety: A safety and solution oriented approach to child protection casework*. NY: WW Norton; Parker, S. (2010). *Family Safety Circles: Identifying people for their safety network*. Perth, Australia: Aspirations Consultancy.

[3] Children's Research Center. (2008). Structured Decision Making: An evidence-based practice approach to human services. Madison: Author.

[4] Weld, N. (2008). The three houses tool: building safety and positive change. In M. Calder (Ed.) Contemporary risk assessment in safeguarding children. Lyme Regis: Russell House Publishing.

[5] Lohrbach, S. (2008). Group supervision in child protection practice. *Social Work Now*, 40, pp. 19-24.

[6] Cooperrider, D.L. (1990). Positive image, positive action: The affirmative basis of organizing. In S. Srivasta, D.L. Cooperrider and Associates (Eds.). *Appreciative management and leadership: The power of positive thought and action in organization*. San Francisco: Jossey-Bass.

[7] Miller, W.R., & Rollnick, S. (2012). *Motivational Interviewing*, (3rd Ed.). NY: Guilford Press.

[8] Lohrbach, S. (1999). *Child Protection Practice Framework - Consultation and Information Sharing*. Unpublished manuscript; Lohrbach, S., & Sawyer, R. (2003). Family Group Decision Making: A process reflecting partnership based practice. *Protecting Children. 19*(2):12-15.

Agenda

Segment 1	Introduction, Review of Agreements	1:00 – 1:10
Segment 2	Review: Meeting Tips, Strategies, and Concepts	1:10 – 1:25
Segment 3	Review of the Wilson Family Vignette	1:25 – 1:50
Segment 4	Before the Meeting	1:50 – 2:30
Break		2:30 – 2:45
Segment 5	Team Role Play: Family Teaming—Concurrent Planning and Behavioral Health Needs for Case Planning	2:45 – 3:45
Segment 6	Transfer of Learning Activity	3:45 – 4:00

Learning Objectives

Knowledge

K1. The trainee will be able to identify the benefits of participating in a team-based planning process, including development of case plans that:
   a. Reflect the family's expression of their priorities and needs
   b. Support ongoing family involvement
   c. Include culturally relevant services and service providers

K2. The trainee will be able to recognize key safety, risk, strengths, and needs assessment information to include in a team meeting to facilitate a team case planning process.

K3. The trainee will be able to identify three strategies to overcome conflict during team case planning:
   a. Reframing
   b. Helping team members identify conflict
   c. Helping team members explore the facts and preferences underlying their alternative viewpoints and opinions instead of focusing on personality conflicts or personal differences

K4. The trainee will be able to identify three strategies to maintain the team's focus on the case plan during team case planning:
   a. Establishing group goals and decision criteria and returning focus to the shared goals and decision criteria throughout the process
   b. Emphasizing common factors that promote consensus in the group discussion
   c. Following orderly, preplanned steps for considering alternatives and deciding on solutions

Skills

S1. In a team meeting simulation or role play activity, the trainee will demonstrate engaging families, community members, and other formal and informal supports to formulate culturally relevant case plans and to identify culturally relevant service providers.

S2. In a team meeting simulation or role play activity, the trainee will be able to demonstrate one of the following three strategies to overcome conflict:
   a. Reframing
   b. Helping team members identify conflict
   c. Helping team members explore the facts and preferences underlying their alternative viewpoints and opinions instead of focusing on personality conflicts or personal differences

S3. In a team meeting simulation or role play activity, the trainee will be able to demonstrate one of the following three strategies to maintain the team's focus on the case plan:
   a. Establishing group goals and decision criteria and returning focus to the shared goals and decision criteria throughout the process
   b. Emphasizing common factors that promote consensus in the group discussion.
   c. Following orderly, preplanned steps for considering alternatives and deciding on solutions

Values

V1. The trainee will value engaging families, community members, and other formal and informal supports to formulate case plans and to identify service providers.

V2. The trainee will value seeing the family as the experts on themselves and being able to identify solutions to their issues and concerns.

V3. The trainee will value the significance of obtaining and including the child's/youth's voice in assessments and planning.

Lesson Plan

Segment	Methodology and Learning Objectives
Segment 1 10 min 1:00 – 1:10 pm	**Introduction, Review of Agreements** Introduce the goals of the training, explain logistics, and review the agenda. Review Learning Objectives pointing out the importance of these competencies. Set Group Agreements.
Segment 2 15 min 1:10 – 1:25 pm	**Review: Meeting Tips, Strategies, and Concepts** Revisit concepts of facilitation, teaming and case planning. *Learning Objectives: K1, K2, K3, K4*
Segment 3 25 min 1:25 – 1:50 pm	**Review of the Wilson Family Vignette** Read narrative and family updates *Learning Objective: K2*
Segment 4 45 min 1:50 -2:30 pm	**Before the Meeting** Small group practice preparing meeting trainees *Learning Objectives: S1, V1, V2, V3*
15 min **Break**	
Segment 5 60 min 2:45 – 3:45 pm	**Team Role Play: Family Teaming—Concurrent Planning and Behavioral Health Needs for Case Planning** Through role playing, trainees will practice the role of social worker as facilitator in a team meeting. *Learning Objectives: K1, K2, K3 K4, S1, S2, S3, V1, V2, V3*
Segment 6 15 min 3:45 – 4:00 pm	**Transfer of Learning Activity**

Segment 1: Introduction, Review of Agreements

Activity Time:	10 minutes
Materials:	Markers, Chart pad
Trainee Materials:	Learning Objectives, page 6 of Trainee Guide
	Setting Group Agreements, page 7 of Trainee Guide

Description of Activity:

The trainer will introduce the training and explain the Learning Objectives and Agenda. The purpose of this training is for new social workers to become more comfortable facilitating informal case planning meetings with families.

During the Activity:

Trainer Instructions:

1. The trainer should introduce self and review Learning Objectives and Agenda.

2. In order to engage in role play, group agreements must be made to maximize safety during the day's activities. Direct trainees to the Trainee Guide, p.7. Ask the trainees to contribute to agreements that the group will abide by during the training. Typically, groups come up with rules, such as be respectful, keep confidentiality, listen to others, participate in learning, etc. The trainer charts the group agreements on easel paper or a whiteboard so that Group Agreements are prominently displayed. The trainer is to monitor the group to ensure group agreements are adhered to. If for any reason, a group agreement is violated, the trainer is to address the violation with the large group and discuss. The goal is to re-establish safety for engaging in the day's activities.

3. Note that in the activities, group agreements for the Family Team meetings have already been established (See Trainee Guide). Explain that this activity is designed as a "parallel process" activity so that the trainees can experience the trainer helping the trainees establish group agreements, much like trainees will do with families when having family meetings.

4. Once group agreements have been established, proceed to Segment 2.

Transition to the next segment

Review of Review: Key Meeting Tips, Strategies, and Concepts

Segment 2: Review: Key Meeting Tips, Strategies, and Concepts

Activity Time:	15 minutes
Materials:	4 Laminated 8 1/2 x 10 Cards labeled – <u>Facilitation Tips, Case Planning Concepts, Teaming Tools</u> and <u>Values/Beliefs</u> 4 sets of (20) Colored 5 ½ x 7 cards of Tips, Tools, Values and Concepts Note: each set of 20 cards is a different color (i.e., blue, yellow, green, pink) Appendix A: Answer Key Chart paper and tape Prizes (optional)
Trainee Materials:	None

Description of Activity:

This activity is review of the content covered in the Teaming, Collaboration, and Transparency classroom training. A topic area card is placed in four different areas of the room. In four groups, trainees work together to place the words/terms under the applicable topic area. The table that correctly matches each word to its corresponding topic area the fastest wins the game.

During the Activity:

Trainer Instructions:

The trainer places the trainees in four groups. Each group is given a set of 20 (same colored) cards with tips, tools, values or a concept related to Teaming Tools, Facilitation Tips, Values/Beliefs of Teaming and Case Planning Concepts (see Appendix A for the list of terms). The trainer places the four topic area cards in four different easily accessible locations throughout the training room. Once all the topic area cards are placed, the trainees should work together with their group to match the tip, tool, value or concept with the topic area in which it best fits. The group that matches all of their 20 cards the fastest and correctly WINS!

Trainer Tip: Based on the amount of remaining wall space in the room, each of the topic areas can be taped on a wall with chart paper. Trainees can tape the 3 x 5 cards to the chart paper. If there is not wall space, place a topic area and chart paper on the floor in each corner of the room. The benefit of having this activity posted on chart paper is that it serves as a visual reminder and reference throughout the training for participants as they build skills through practice.

Transition to the next segment

Review of the Wilson Family Vignette

Segment 3: Review of the Wilson Family Vignette

Activity Time:	25 minutes
Trainee Materials:	Synopsis of the Wilson Family, pages 8-9 of Trainee Guide SDM Safety Assessment Tool, pages 10-12 SDM Risk Assessment Tool, pages 13-16 SDM Family, Strengths and Needs Assessment Tool, pages 17-25

Description of Activity:
Trainees review the Wilson family summary and updates, including applicable standardized tools. Trainees might be familiar with the Wilson family from attending the "Writing Behavioral Objectives" training.

During the Activity:

Trainer Instructions:
- ☐ Remind the trainees that they were introduced to the Wilson family in the morning training: *Writing Behavioral Objectives.*
- ☐ Asks trainees to read the Wilson family summary and updates on pages 8-9 of the Trainee Guide and the related SDM tools (Safety Assessment Update, Risk Assessment, FSNA), pages 10-25.
- ☐ Remind trainees that it is important to gather balanced information about the family and the issue(s) to be discussed.
  - o Have trainees read for what's working well for the family and what the child welfare agency and family are worried about.
  - o Be knowledgeable about the family, the current circumstances, assessments completed, and relevant history, taking into consideration the family's culture and trauma history.
  - o Have trainees consider factors that may affect how safety and risk information is presented, including whether or not children or youth will be at the meeting, concerns about behavioral health, intimate partner violence and/or substance use.

After the trainees have finished reading the materials, the trainer will need to facilitate a large group discussion about preparing for family meetings by posing the following questions:
- ☐ Ask trainees to highlight the changes from the previous assessments to the new assessments based on new information:
  - o An SDM Safety Assessment was updated from Safe with a Plan to Unsafe and child needs to be placed in protective custody to ensure the child is safe.
  - o The SDM Risk Assessment went from high to very high.
  - o How will the information in the FSNA be shared and communicated with the family?
  - o What are ways the FSNA be incorporated into the Case Planning process and/or team meeting?
- ☐ Who would they invite to the family team meeting to case plan focusing on Concurrent Planning and Behavioral Health needs?
- ☐ How would you go about preparing [all] participants for a family team meeting?
- ☐ What do participants need to know?
- • Trainees might offer ideas related to logistics such as:
  - o Who will be there?
  - o Where will it be?
  - o How long will it be?
  - o What will we talk about?

Wrap up the conversation by acknowledging that although social workers are accustomed to participating in agency related meetings to make decisions, it most likely is a new experience for families and their network. Acknowledge that depending on the trauma history of the individual family members, such meetings can evoke a range of emotions to

include anxiety, anger, fear and defensiveness. Effectively preparing meeting trainees for the meeting is trauma-informed practice.

Before the Meeting—Preparing the Team

Segment 4: Before the Meeting⸺Preparing the Team

Activity Time:	40 minutes
Trainee Materials:	Before the Meeting⸺Preparing the Team pages 26-27 of Trainee Guide (Activity 2) Family Team Meeting, pages 28-30 of Trainee Guide Handout 1: Case Planning in a Team Setting⸺Preparing the Team

Description of Activity:

In triads, trainees will role play preparing team members to attend a case planning meeting. Each participant will practice the role of a social worker either preparing a parent, child/youth or other family member/provider for an upcoming meeting sharing the results of the SDM FSNA, while the other trainees act as an observer and/or parent, child/youth or other family member/provider.

During the Activity:

Trainer Instructions:
- ☐ Inform the trainees that the purpose of this meeting is for case planning to discuss concurrent planning and the behavioral health needs of one of the children. Each participant will practice different roles:
  1. A social worker either preparing a parent, child/youth or other family member/provider for an upcoming meeting,
  2. Mr. or Mrs. Wilson
  3. while the other trainee acts as an observer
- ☐ Instruct trainees to utilize the FSNA as topic areas to focus discussion
- ☐ The purpose of this meeting is to discuss/explain concurrent planning and the mental health needs for Omar with the family and their team.
- ☐ Provide the following as an example for a beginning point:
  - o **First social worker** will ask about what the person would like to happen as the result of the meeting and discussion of the family's strengths and needs assessment.
  - o **Second SW** asks about successes and how your family got involved with the agency
  - o **Third SW** asks who do you want to have at your team meeting and where is the best place to have the team meeting
- ☐ Suggest to the group, that the SW role be aware of what is being observed and charted in Handout 1 – so there are no surprises on what the SW should to try to cover.
- ☐ Provide an overview of the Family Team Meeting:
1. Ask trainees to review the purpose of the meeting and roles on Alana Wilson (mother) and Matthew Wilson (father) on page 28 of the Trainee Guide.
2. Divide the trainees into groups of no more than three trainees. If needed, an extra person can be an additional observer for a group.
3. One participant will begin the activity by role playing a social worker preparing either Mr. Wilson or Mrs. Wilson for the meeting.
4. The other two trainees will either be the meeting participant (Mr. Wilson or Mrs. Wilson) or an observer.
5. For 5-6 minutes, the first participant will role play preparing the parent, using the topics, questions or tools (i.e. Circle of Support, Genogram, Eco-Map) on pages 26-27 of the trainee guide as a reference.
6. After no more than 6 minutes, ask the role play to stop and the participant observers will provide constructive feedback as to the following. (Note: start with what went well):
   a. *Was the purpose of the meeting clearly explained?*
   b. *Were topics such as full disclosure, concurrent planning and the definition of permanency clearly explained?*
   c. *Was there an inquiry made as to the meeting participant's ideas related to the priority areas, strengths and needs of the family?*

d. Was there an inquiry made as to potential team members?

7. After no more than 4 minutes of feedback/debrief, ask the trainees to switch roles.
8. Continue 6 minute role plays with 4-minute feedback/debriefs two more times so that each participant has the opportunity to practice the role of social worker.
9. Have the third and final role play involve a family member, youth, provider, or community member (i.e., Omar, Aunt, Tribal Worker, Pastor, etc.). Allow each triad to decide which participant they want to role play.

   TRAINER NOTE: Facilitate a discussion about whether or not the youth Omar should be included in the meeting. How will they decide? If *yes,* what preparation is needed? If *no,* how will you include Omar's voice? Add to any suggestions from the large group discussion the following ideas:
   a. Child stays in the room for "working well" and leaves for "worries" and "next steps"; or
   b. If the child will not be present, have a picture of the child or bring in completed Three Houses or Safety House.

10. Ask the trainees if they have any other questions as it relates to preparing trainees. Emphasize that this preparation is important regardless if the worker is facilitating an informal family meeting or if the worker and family will be participating in a formal structured agency meeting with a facilitator other than the worker (i.e., TDM, Family Group Conferencing, Child and Family Team Meeting).

Transition to the next segment

Family Team Meeting ⎯Concurrent Planning and Behavioral Health Needs for Case Planning

Segment 5: Family Team Meeting: Concurrent Planning and Behavioral Health Needs for Case Planning

Activity Time:	60 minutes
Trainee Materials:	Handouts #2a, 2b, 2c, 2d Observer Feedback Name tents for role play

Description of Activity:
This is a large group role play. This activity will be one fluid team meeting that lasts for 30 minutes. Trainees will rotate roles. Please note that family meetings may be formal or informal meetings. Some meetings may be facilitated by a formal facilitator with specific structures and roles and desired outcomes or the social worker may be called upon to facilitate a more informal meeting with specific goals to achieve. The following activity is designed as an informal meeting with the family and other network members around two specific issues.

> **TRAINER NOTE:** suggestion for dividing the 60 minutes:
> - Trainer provide instructions to activity (5 minutes)
> - Participants read roles, get role assignments and do name tents (5 minutes)
> - SWer/Facilitator #1 (10 minutes) – What are we worried about?
> - SWer/Facilitator #2 (10 minutes) – What needs to happen next? (related to Concurrent Plan)
> - SWer/Facilitator #3 (10 minutes) – What needs to happen next? (related to Behavioral Health Needs) and Delta/Plus
> - Participant/Observer Feedback and Debrief (20 minutes)

During the Activity:

Trainer Instructions:
1. This team meeting focuses on:
   a. Concurrent planning; and
   b. Omar's mental health and trauma

2. Ask trainees to volunteer for a role. If trainees are hesitant to volunteer, remind them that today's training is an opportunity to practice in a safe learning environment prior to working with actual families. If there are not enough volunteers, assign roles to the remaining trainees. Everyone will either have a role or be a "topic area observer", expected to provide feedback on target areas.
   - Alana Gomez Wilson (mother)
   - Matthew Wilson (father)
   - Teresa Alvarez (maternal aunt)
   - Doreen Bearchild (paternal grandmother) (by phone, this person could sit off to the side as if she is hearing and talking on the phone)
   - James Jeffers (father's AA sponsor)
   - Reverend Jorge (Pastor)
   - Helen Barranco (Mental Health Worker for the department)
   - Leslie Whitehorse (Tribal Social Worker)
   - Social Worker as Facilitator (three trainees will play this role during the activity)
   - Remaining Trainees are observers assigned one of the four topic areas (Teaming Tools, Facilitation Tips, Values/Beliefs, Case Planning Concepts)

If the class is a small one, reduce the number of roles. Critical roles are the mother, father, social worker, and at least 1 observer. Add roles (based on class size) in the following order: maternal aunt, Tribal social worker, paternal grandmother, mental health worker, father's sponsor, pastor. If the class is larger, then assign additional people to each of the four topic areas for observers.

TRAINER NOTE: It is suggested that the trainer asks each trainee to write the name of the individual they are portraying in the role play on a name tent for the benefit of the social worker/facilitator and the other trainees.

3. Ask "topic area" observers (you will need at least four observers) to use **Handout 2 a, b, c, or d** to assess to what extent their area of focus was covered:

   - Observer 1: utilizing the handout focusing in on observing for facilitation strategies utilized

   - Observer 2: utilizing the handout focusing in on observing for inclusion of the family's values and beliefs

   - Observer 3: utilizing the handout focusing in on observing for elements for case planning

   - Observer 4: utilization of the handout focusing in on observing teaming with all the participants and inclusion of the family's voice.

4. This ACTIVITY will be one fluid team meeting that lasts for 30 minutes. Each social worker will conduct the team meeting for 10 minutes. Social Worker 1 will begin the team meeting and after 10 minutes, Social Worker 2 will pick up where Social Worker 1 left off. Social Worker 2 will lead the team meeting for 10 minutes and Social Worker 3 will pick up where Social Worker 2 left off. Social Worker 3 will conclude the team meeting and if possible, summarize action items or plans. The trainer will need to act as a time keeper throughout the meeting, notifying social worker/facilitators when there is 2 minutes remaining (i.e., hold up a sign) and when the 10 minutes has ended.

5. Ask trainees to read the directions of each role in the Trainee Guide pages 28-29 that trainees should respond within a range easy to difficult answers. Trainees should be coached to not role play an "extreme" point of view or person. The goal is to practice and have success at building skills in team facilitation.

6. The structure of the team meeting should be to focus on what are the worries and what needs to happen. The "what is working well" is provided (page 29 of Trainee Guide) so that the social worker can begin on the next question.

7. After the role play is completed, start by FIRST asking the social worker/facilitator for their own "plus/deltas" (this is an opportunity for self- reflection for the trainees). What did the trainees themselves see as his/her strengths in facilitating the meeting? What does he/she see as potential upgrades for the next time?

8. Ask "topic area" observers to provide feedback about the area they were assigned.

9. After the observers report out, ask all trainees for thoughts, ideas and suggestions. Focus discussion on:
   - Was culture discussed and in what context?
   - Were there conflicting cultural perspectives? (Keep in mind that culture is defined in broad terms, including but not limited to: race/ethnicity, LBGTQ, socioeconomic status, education, military life, etc.)
   - Were all team members encouraged to participate?
   - How was the FSNA discussed with the team and were potential resources explored that would help shape a culturally relevant case plan?
   - Ask participants to explain how concurrent planning is related to reunification
     - What is the importance of concurrent planning?
     - What SDM tools would you use to assess for reunification?
     - What would you need to see this family demonstration over time to reunify?

10. Thank trainees for their willingness to take risks in skill building in front of peers. Connect this part of the activity to how families are asked to be vulnerable in participating in family teaming as well.

11. The trainer(s) are to facilitate and give feedback for each person who role played the Social Worker consecutively on:
    - Strengths—what did each of the social workers do well?
    - Upgrades—one or two suggestions

12. Ask trainees if they saw examples of:
    - Reframing—were there any examples of reframing actions and/or behaviors as meeting underlying needs, normalizing feelings or behaviors, etc.?
    - Helping specific team members identify conflict or differing ideas
    - Helping team members explore the facts and preferences underlying their alternative viewpoints and opinions instead of focusing on personality conflicts or personal differences
    - How the facilitator of the meeting kept the group focused on the issues at hand

Transition to the next segment

Transfer of Learning

Segment 6: Transfer of Learning

Activity Time:	15 minutes
Trainee Materials:	Transfer of Learning page 31 of Trainee Guide

Description of Activity:
This is an individual activity that focuses on Transfer of Learning of today's training to the field.

During the Activity:

Trainer Instructions:
1. Direct trainees to the Trainee Guide p 31. Ask trainees to reflect on today's training and what they would like to remember, what they would want to know more about and who will the participants talk with about today's training. The purpose of the activity is to support transfer of learning of the skills and knowledge practiced in today's training.

2. The transfer of learning document is open-ended and asks the trainees to personalize the document. The headings below may be used as a prompt to help trainees fill out their form:
   - ✓ Appreciative Inquiry
   - ✓ Concurrent Planning
   - ✓ Teaming Strategies
   - ✓ Facilitating difficult conversations
   - ✓ Reinforcing strengths
   - ✓ What was important to this family in this case scenario
   - ✓ Cultural heritage of the family
   - ✓ Safety, Permanency and Well-being
   - ✓ My strengths in teaming
   - ✓ My challenges in teaming
   - ✓ Facilitating difficult conversations
   - ✓ Addressing cultural issues with families
   - ✓ Partnering with families

3. Counties have a number of family team meetings with differing goals. Direct trainees to check with their local counties on tools available to facilitate family team meetings.

4. If time permits, ask trainees to share with a partner what they are committing to for their transfer of learning from this class.
5. Complete RTA Participant Satisfaction Survey

Handouts

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, LBGTQ, 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, LBGTQ, 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, LBGTQ, 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, LBGTQ, 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?

Appendix

Matching Game Answers

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.

1. Circle of Support
2. Eco-Map
3. Genogram
4. Three Questions
5. Safety House

Facilitation Tips—techniques used during teaming meetings to increase partnership, consensus and shared decision making.

1. Reframing
2. Overcoming conflict
3. Promoting consensus
4. Establishing group goals, decision criteria and staying focused on both throughout the meeting
5. Explore the facts and preferences of alternative viewpoints as oppose to focusing on personality conflicts and personal differences.

Case Planning Concepts—elements that should be reflected in all case plan documents.

1. Customized for the family, their culture, community and tribes.
2. Family input.
3. S.M.A.R.T.
4. Includes key assessed safety, risk, strengths and needs of each family member.
5. Concurrent planning

Values and Beliefs—our ideals related to case planning in team meetings.
1. Families are experts on themselves.
2. Children/youth are partners in assessment and safety planning.
3. All families have strengths.
4. Families can make well-informed decisions about keeping their children safe.
5. Families define their own members, which may extend beyond the primary birth family.

Materials Check List

SDM Policy and Procedure Manual

Chart Paper and tape

Prizes (optional)

Name tents for role play

On chart paper create the following posters and displayed around the room in the order listed below:

Poster #1⸺Agenda
- Purpose/Outcome
- Context
- Group Agreements
- Network
- What Is Working Well?
- What Are We Worried About?
- What Are Our Next Steps?
- Delta/Plus

Poster #2⸺Group Agreements
- Each person will speak one at a time.
- Be respectful of other people's opinions.
- This meeting is a safe place to talk. We agree that what is said in this meeting stays in this meeting.
- If we can't resolve a disagreement, we will put it in a "parking lot" and we'll see what and who we should talk further to about the disagreement.
- We will stay focused on what is best for Omar and Alejandro. We may not agree, but we will try and keep them the center of the conversation**.**

Poster #3⸺Purpose (on top) Outcome (middle of paper)
Purpose:
- To discuss the plan of reunification and concurrent planning.
- To discuss Omar's behaviors, ADHD and learning disabilities.
Outcome:
- An alternate plan(s) for Omar in the event he does not return home.
- A decision as to what kind of mental health trauma-informed treatment that Omar may need.

Poster #4⸺ What Is Working Well? Both parents have maintained sobriety for over 2 years.
- The parents have sought medical treatment to address Omar's behavior and are providing him with the prescribed medication as directed.
- The parents have a positive working relationship with the school. The parents attend parent conferences and have had phone calls with the teachers.
- The children attend school regularly.
- The children are well-cared for and supervised closely.
- The parents have attended parenting classes and have begun using the new skills they learned in class. The parents take the children at least twice a week to the park and read nightly to the children.
- There are multiple relative and community supports available to the family.
- The family has participated in cultural activities, including Tribal functions.
- Mr. Wilson has a job.

Chart Paper titled: What Are We Worried About?
- Blank chart paper underneath (perhaps two)

Chart Paper titled: What Needs to Happen Next?
- Blank chart paper with three columns
- Who? What? How will we know it worked?

Chart Paper titled: Delta/Plus
- Blank chart paper with two columns
- Left-side = delta Right-side = plus

4 sets of (20) Colored 5 ½ x 7 cards of Tips, Tools, Values and Concepts (Note: each set of 20 cards is a different color: i.e., blue, yellow, green, pink)

4 Laminated 8 1/2 x 10 Cards labeled:
- Facilitation Tips
- Case Planning Concepts
- Teaming Tools
- Values/Beliefs

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