

Case Planning and Service Delivery Field Activity

Collaborative Assessment, Planning, and Support: Initial Case Plan

OBSERVATION

Identify a case for which a team meeting to discuss case planning and service delivery 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 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: The Initial Case Plan
(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 to address the family and child's underlying needs.
- K2.** The trainee will be able to identify the purpose of utilizing the Family Strengths and Needs Assessment Tool when developing an initial case plan.
- K3.** The trainee will be able to identify engagement strategies for developing a case plan in full partnership and collaboration with the family.

Skill

- S1.** The trainee will integrate strength based and solution focused language when discussing safety, risk, strengths, and needs assessment information with the team in a way that provides clear information and engages the family and tribes in developing a case plan.
- S2.** The trainee will partner with the family and tribe to identify safety network members and the process for accessing the safety network.
- S3.** The trainee will use at least one of the strategies to maintain the family team's focus on the case plan as a practical, concrete, prioritized plan for the family that addresses the concerns defined by the family and others.
 - a. Identifying and focusing on underlying needs, shared goals, and decision criteria throughout the process
 - b. Emphasizing common factors that promote consensus in the group discussion
 - c. Facilitating dialogue which considers alternatives and possible solutions
- S4.** The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with a child, youth, parent/caregiver, family and tribe (inclusive of the family's team) 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 value the role of the team in developing case plan that meets the needs for safety, permanency, and well-being of the child.

V2. The trainee will value transparency in discussing risk, safety, and the role of the court with the family and their team.

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

V4. The trainee will respect and honor the voice and choice of the child, parent/caregiver, youth, young adult, family and tribe.

Activity

Practice Area: Case Planning and Service Delivery

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

Estimated Time Required: 3 hours

Related eLearning/classroom:

- Purposeful Invitation
- Case Planning Basics
- Writing Behavioral Objectives
- Case Planning in a Team Setting

Description of Activity:

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

This activity is designed for initial case plan development. Examples of team-based case planning opportunities that can be utilized for this field activity include (but are not limited to: safety planning meetings, mappings, TILP/TILPC, CFTs, or other case planning types of meetings. The process of case planning does not happen during one meeting, rather, it is a series of activities that engage the child, youth, parent, family, tribe, and any other member of the safety network in identifying a safety goal. The family's strengths and needs inform what actions are needed to provide safety and identify which services will help reduce risk and provide for well-being of the child(ren). With the understanding that there are many activities that are part of the case planning process, this field activity will focus on the last step – bringing the safety network together to finalize the case plan. Some of the case planning activities that may have occurred prior to the case planning meeting with the safety network include, but are not limited to:

- Completing the Family Strengths and Needs Tool
- Working with the family and tribe to identify safety network members
- Meeting with individual members of the safety network to gather their input regarding the family's strengths and what is needed to provide safety for the child

- Working with the family and other members of the safety network to determine the safety and permanency goals for the child
- Exploring culturally responsive services and community-based supports
- Exploring with the family and other members of the safety network the specific actions and strategies to meet the family’s unique needs that provide safety and support the well-being of the family.

Before the practice opportunity

Field Advisor Responsibility:

- ❑ Work with the trainee to identify a case for which a team meeting to discuss an initial case plan 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.
- ❑ Following the consultation with the assigned social worker, discuss with the trainee their role in the meeting. Be clear about the role of the observer. The observer does not participate in the meeting, ask questions, or provide input about the case plan goals or objectives. As an observer, the trainee will complete the observation worksheet, which will be reviewed with the field advisor following the meeting.

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.
 - 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 plans.
- ❑ Ask any additional questions about the case or family circumstances to help better understand the purpose of the meeting and what will be discussed.
- ❑ Review documents, materials, or other information recommended by the assigned social worker in preparation for the meeting.
- ❑ Review:
 - SMART Objectives
 - Case Plan Field Tool
http://calswec.berkeley.edu/sites/default/files/uploads/case_plan_field_tool_for_parents_122014.pdf

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?
- ❑ Complete the Field Advisor **Case Planning and Service Delivery** survey:
 - https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_5dxKldW9UfZ9bdb

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?
- ❑ Complete the Social Worker **Case Planning and Service Delivery** survey:
 - https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_40b3VOVI3uLldHv

**Collaborative Assessment, Planning, and Support: Initial Case Plan
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 family? If yes, describe how this was done?	
Did the meeting include a discussion about what the family, the safety network, and the agency are worried about (concerns/needs)? If yes, describe how this was done?	
Describe how SDM tools (Safety Assessment, Risk Assessment, Family Strengths and Needs Assessment) were talked about in the meeting.	
Describe how the family's circle of support/safety network was engaged in the case planning process.	
Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the case planning process.	
What were the case plan goal(s) and objectives identified in the meeting? How did the goal(s) and objectives relate to the family's underlying needs and strengths?	
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? <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>	
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?	