Common Core 3.0

100 Level Field Activities

Field Guide for Social Workers and Field Advisors
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COMMON CORE 3.0 INTRODUCTION

Prior to Version 3.0, common core content was provided only as classroom modules. It was organized by key topic areas and there was no required sequence. Common Core 3.0 has three major changes to the way new social worker training is delivered in California:

a. Organization of training around practice areas so that all the concepts included in the content are grounded in practice skills and the California Core Practice Model casework components, practice elements, and behaviors.
b. Making strategic use of online modules to maximize classroom time for skill practice
c. Providing new social workers with opportunities to enhance classroom learning through application of concepts in the field

Beyond re-imagining the way social work practice is presented in core, this revision also incorporates a wider range of training modalities, including e-learning, classroom learning, and coaching. It includes materials to support transfer of learning and to carry the learning experience into the field. The revised core provides a more comprehensive picture of child welfare practice for new social workers; uses field experiences to ground training in actual social work practice; streamlines learning to focus on key knowledge, skills, and values; and uses a variety of training modalities to promote expediency in providing content.

The Field Guide

The purpose of this Field Guide is to provide a structure for transfer of learning activities and feedback regarding skill development. It serves as a guide for both field advisors and new social workers, providing an opportunity for trainees to practice new skills in a natural framework. Specific activities have been identified with step-by-step instructions for new social workers and field advisors. By organizing activities within the context of social work practice activities, there is greater flexibility for skills to be practiced based on the needs of a family rather than requiring a skill to be practiced at a specific time or with a specific case.

The Field Guide formalizes the process by which new social workers learn and apply new skills. It is grounded in the research, which indicates that coaching helps individuals learn new skills faster, more efficiently and more effectively (Coaching Toolkit for Child Welfare Practice, 2012; Northern California Training Academy). The goal of the Field Guide is to provide a method for new social workers to learn new skills in a way that supports their professional growth and development, ultimately leading to improved service delivery to youth and families. Additionally, it supports an environment where learning and professional development are valued and seen as necessary to working successfully in the field of Child Welfare.
CC3.0 Field Activity Roles and Expectations

Field learning activities require the participation of the new social worker and a Common Core 3.0 (CC3.0) field advisor. Both participants play a vital role in the transfer of learning process. Counties will work with their affiliated training organizations to identify CC3.0 field advisors to support new social workers in the field activities.

Supervisors are well situated to fill this role. Counties may identify other individuals as CC3.0 field advisors depending on local needs. For example, in some counties, staff who serve as IV-E field instructors may also take on the role of CC3.0 field advisor. In other counties, the CC3.0 field advisor role may be filled by an external agency to support field activities. For the purposes of this document, the CC3.0 field advisor will be referred to as supervisor or other designee. Regardless of title or role within the agency, each CC3.0 field advisor will receive training specific to the role of the CC3.0 field advisor in supporting new social workers. In the event that the field advisor is not the new social worker’s supervisor, a process will be put in place to provide feedback regarding the completion of field activities to the new social worker’s supervisor. Best practices to facilitate the feedback process will be outlined in the Field Guide.

CC3.0 Field Advisor Role and Expectations
The supervisor or other designee provides field support to the new social worker before, during, and after identified field activities. The person in this role will:

• Promote a learning environment and utilize appropriate coaching strategies, tools, and techniques to promote desirable and sustainable growth for the new social worker
• Promote knowledge and skill development that aligns with the desired practice
• Track completion, document information needed for evaluation components of CC3.0 and provide information to CDSS, the Regional Training Academy (RTA), or enter information into a learning management system.

The supervisor or other designee is encouraged to utilize existing conference or meeting times with the new social worker to discuss learning objectives, field activities, and provide feedback regarding observations or practice. Review of field activities during regular supervision or training support reinforces social work best practice and provides an opportunity for new social workers to ask questions, process information, and apply what is learned to new situations.

New Social Worker Role and Expectations
It is expected that the new social worker will participate fully in the field activities. As outlined in the NASW Code of Ethics, “Social workers continually strive to increase their professional knowledge and skills and to apply them in practice.” With this in mind, the new social worker should be open to feedback regarding observations or practice. The new social worker will receive field activity support and any additional training needed to increase family safety and family well-being. The CC3.0 field advisor will work with the new social worker to help him/her meet the learning objectives identified as part of the field activities.

1 Roles and Expectation adapted from Northern California Training Academy’s Coaching Toolkit for Child Welfare Practice, 2012
Field Activity Survey Completion

As part of the CC3.0 evaluation process, new social workers (trainees) and field advisors are asked to complete surveys related to each Block’s Field Activity. Additionally, new social workers (trainees) are asked to complete a survey related to the field activity experience. By completing the surveys, new social workers and field advisors will be helping CalSWEC to understand the effectiveness of this training for future participants. Participation in the surveys is completely voluntary and all of the information is kept entirely confidential. The information provided will not be associated with the participant’s identity or performance in any way.

Instructions for completing the field activity surveys:
Social workers and field advisors are requested to complete the field activity surveys via the links provided in this field guide. Social workers and field advisors will be prompted to complete each activity survey as part of the field guide, which will also include the survey link. It is recommended that the social worker and field advisor complete the survey for each respective field activity as soon as possible after completion of the activity, or within two weeks at the latest.

FIELD ACTIVITY SURVEY COMMENTS AND QUESTIONS should be directed to:

- Tenia Davis, Training and Evaluation Specialist, CalSWEC
  - calswec_rta_cc@berkeley.edu
- Sandhya Rao Herman, Director of Research and Evaluation, CalSWEC
  - calswec_rta_cc@berkeley.edu

GENERAL QUESTIONS RELATED TO CC3.0 AND FIELD ACTIVITIES should be directed to:

- CalSWEC at: calswec_rta_cc@berkeley.edu
FOUNDATION BLOCK FIELD ACTIVITIES

Block 1 – Foundation

<table>
<thead>
<tr>
<th>Field Activity</th>
<th>Learning Objectives</th>
</tr>
</thead>
</table>
| ICWA and Working with Native American Tribes (1 hour) | K1. Identify one ICWA designated agent, tribe, or Indian Service Agency in your county.  
K2. Identify culturally relevant services and resources for Native American families in the community.  
V1. The trainee will value keeping an Indian child connected to culture and community. |
| Fairness and Equity in Practice (1 hour) | |

ICWA and Working with Native American Tribes

Learning Objectives

Field Activity: ICWA and Working with Native American Tribes (1 hour)

Knowledge
K1. Identify one ICWA designated agent, tribe, or Indian Service Agency in your county.
K2. Identify culturally relevant services and resources for Native American families in the community.

Values
V1. The trainee will value keeping an Indian child connected to culture and community.

Activity

Practice Area: Foundation

California Core Practice Model Practice Behaviors: 4 (a-g), 5 (a-d), 8 (a-e), 10 (a-c), 12 (a-h)

Estimated Time Required: 1 hour

Related eLearning/classroom:
- Introduction to ICWA
- ICWA and Working with Native American Families and Tribes
- Federal and State Laws
- Legal Procedures
- Legal Procedures and Responsibilities

Description of Activity:

This field activity will prepare the social worker for success in the field should they encounter an Indian child. This will be achieved by identifying local ICWA resources to support child welfare outcomes and will reinforce the value of keeping an Indian child connected to culture and community.

Through this activity the social worker will research and identify an ICWA designated agent for a tribe within their county, and identify culturally appropriate resources for a child and family served by the child welfare agency. As a reference for social workers and field advisors, please utilize the following link to access the BIA Designated Tribal Agents for Service of Notice document:
The social worker and field advisor will review the information together and discuss how this relates to the purpose of the ICWA and the value of keeping a child connected to culture and community.

**Before the practice opportunity**

Prior to completing this field activity, the Field Advisor and the Social Worker should review the Purpose of ICWA and Tribal Sovereignty.

The Purpose of ICWA is to: “Protect the best interests of Indian children. Promote the stability and security of Indian tribes and families. Prevent the unwarranted break-up of Indian families. Protect the child’s relationship with their tribe and culture identity.”

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**Tribal Sovereignty and Child Welfare**

Practice Tips for social workers to understanding government to government relations in ICWA cases.

Sovereignty is a word of many meanings. Merriam Webster defines Sovereignty as: a: supreme power especially over a body politic; b: freedom from external control: see autonomy; c: controlling influence. Generally, the term refers to the inherent right or power to govern. Under the U.S. constitutional system, this right is inherent in the people and is exercised through their representative local, state, and federal governments. This is somewhat comparable to the inherent sovereignty of Indian people in the tribal context.

As recognized by Congress, the executive branch, and the Supreme Court, tribes’ right to govern their members and remaining territories derive from a sovereignty that pre-dates European arrival. Treaties entered with tribes by the U.S. and other countries is one example of the longstanding relationship between the United States and tribes as sovereign nations.

The principal attributes of tribal sovereignty today can be generally summarized as follows: (1) Indian tribes possess inherent governmental power over all internal affairs, (2) the states are precluded from interfering with the tribes’ self-government, and (3) Congress has plenary (i.e., near absolute) power to limit tribal sovereignty and thereby limit the first two attributes. The federal policy of tribal self-determination, with its beginnings in the 1930s and a renewal in the 1970s, had created opportunities for tribes to retain their sovereignty and to overcome some of the restraints arbitrarily or improperly placed on that sovereignty over the past 150 years.

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1 This document was developed by the American Indian Enhancement team in collaboration with the National Resource Center for Tribes, and Tribal STAR with technical support from the Hon. William Thorne. The American Indian Enhancement Team is an effort of the California Disproportionality Project, a Breakthrough Series Collaborative (BSC) resourced through the Annie E. Casey Foundation, California Department of Social Services, CalSWEC, Casey Family Program, Child and Family Policy Institute of California, and the Stuart Foundation. Revised 11/2015.


4 Ibid.

5 Ibid.
Social workers who have American Indian/Alaska Native children on their case load may be unaware that the Indian Child Welfare Act applies to their case or of the affect the law and tribal sovereignty may have on their case. Why is there a law that specifically targets American Indian children in child welfare? Why aren’t there other laws that address the needs of other groups such as African Americans or Hispanic/Latinos? Simply put, being American Indian is not only a cultural distinction; it is also a political one. The United States has a government-to-government relationship with American Indian/Alaska Native tribes and through that relationship has the obligation to protect the best interests of American Indian children and to promote the stability and security of Indian tribes and families.

Tribes exercise their sovereignty in many ways, including designating ICWA representatives to receive notice from state child welfare agencies and state courts; appointing an ICWA representative in order to ensure that the tribe is informed and can respond to the notice; defining expert witness criteria, and recommending Tribal Customary Adoption as a permanency option for its children.

**Tips for Social Workers**

1. Learn about the tribe(s) in your county and state. You can obtain a copy of ICWA designated agents at http://www.tribal-institute.org.

2. Be aware that when a tribe intervenes in an ICWA case involving their child, the tribe is then a party to the case and legally entitled to the same rights as all other parties to the case.

3. In cases where the child’s tribe is geographically too far to participate in the court process the tribe may designate a representative to appear in court on the tribe’s behalf.

4. If the child’s tribe does not intervene in a case or assume jurisdiction, the case continues to maintain ICWA status and culturally appropriate active reunification services are still required.

5. Tribes exercise sovereign status in many ways, including during Tribal Customary Adoption, and to define criteria for expert witness.

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*25 U.S.C. §1902*
6. Communicate with tribes as though you were contacting the governor’s office of a neighboring state. Show the same level of respect and adhere to appropriate protocols as you are dealing with representatives of a sovereign nation.

7. Respectfully consider what the tribe has to say; otherwise the tribe may decide to pursue legal avenues which could be timely and costly. If respect and courtesy is established early on in the relationship there is a greater potential for collaboration on case options. The more options, the better chances for positive outcomes for Indian children.

8. Attempt to resolve the case informally before having to resolve the case before a judge.

For additional information, please visit the Implementation Toolkit for the American Indian Enhancement Project on the CalSWEC website: [http://calswec.berkeley.edu/toolkits/implementation-toolkit-american-indian-enhancement-project/american-indian-fact-sheets](http://calswec.berkeley.edu/toolkits/implementation-toolkit-american-indian-enhancement-project/american-indian-fact-sheets)

**Field Advisor Responsibility:**
Note for the Field Advisor – This activity may take longer the first time it is completed, as it is expected that the field advisor have some level of knowledge about ICWA protocol and resources. The field advisor is encouraged to create and maintain an ICWA file to be used for the activity in the future.

- Identify and make copies of any county-tribal protocol, county-tribal MOUs, or any list of internal ICWA liaisons or specialists.
- Review list of federally recognized and state recognized tribes within the county and the associated designated agents.
- Field advisors are encouraged to research culturally appropriate resources for American Indian/Alaska Natives in the county and create a list (if one is not already available in the county) that can be shared with the trainee and used to support social work practice. This may include, but is not limited to, Indian Health Services, Tribal TANF, Title VII Indian Education programs, American Indian workforce programs, and other social service agencies for American Indians.
- Review the field activity with the social worker. Check that they understand the tasks completely.
- Discuss how the field activity relates to the purpose of the Indian Child Welfare Act.
- Guide the social worker to consider the implications, challenges, and accessibility of resources should they identify an Indian child on their caseload.
- Encourage the social worker to learn additional information about the tribe, if possible, and time permits.
- Provide information to the social worker about where to locate the county-tribal protocol, county-tribal MOUs, and any list of internal ICWA liaisons or specialists (if applicable).

Social Worker Responsibility:

- Review field activity knowledge and value objectives.

### During the practice opportunity

Social Worker Responsibility:

- Locate and review:
  - County-tribal protocol,
  - County-tribal MOUs (Memorandum of Understanding)
  - Any list of internal ICWA liaisons or specialists (if applicable)

The social worker should note where these ICWA resources are located or print the items listed above for future use.

- Identify federal and state recognized tribes within the county and their associated ICWA designated agent. Document the address for purpose of notice and physical location. Create a map with driving or travel directions to visit the tribe and the ICWA designated agent. Document all contact information necessary should the social worker identify an Indian child from this tribe within their caseload.
- If there are no federal or state recognized tribes within the county, the social worker should locate the nearest CA tribe for the purposes of this activity.

- Identify at least 1 American Indian service agency in the county or region that provides services to Indian children and families. This may include, but is not limited to: Indian Health Service, Tribal TANF, Title VII Indian Education, Indian workforce development or any social services that serve American Indians/Alaska Natives specifically. Document the address for purpose of notice and physical location. Create a map with driving or travel directions to visit the organization. Document all contact information necessary should the social worker identify an Indian child from this tribe within their caseload.

- If there are no American Indian service agencies within the county, the social worker should locate the nearest American Indian services program for the purposes of this activity.

### After the practice opportunity

**Field Advisor Responsibility:**
- Ask the social worker to share the information they obtained.
- Discuss with the social worker any challenges they would anticipate in providing services to an Indian child.
- Review the information with the social worker and ask how these relate to the purpose of ICWA? California’s Practice Model, and best practices?
- Review with the social worker that Active Efforts begin immediately when they have reason to believe they have an Indian child in their care and that the California Practice Model supports engagement and teaming with tribes.
- Encourage the social worker to create a file to maintain resource information related to ICWA.

**Social Worker Responsibility:**
- Create and maintain an ICWA file to contain:
  - Tribal contact information.
  - County protocol
  - List of ICWA specialists & resources
- Reflect on the activity:
  - What did you learn from the activity?
  - How will you use what you learned from the activity?
  - What additional information or resources would be helpful when you identify an Indian child?
  - What questions do you still have?
- Discuss with the field advisor how identifying the information in the activity relates to the purpose of ICWA? California’s Practice Model, and best practices?
- Ask any clarifying questions.
Fairness and Equity in Practice

Learning Objectives

<table>
<thead>
<tr>
<th>Field Activity: Fairness and Equity in Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Knowledge</strong></td>
</tr>
<tr>
<td>K1. The trainee will be able to describe the prevalence of disparity and disproportionality within their county in child welfare services.</td>
</tr>
<tr>
<td>K2. The trainee will be able to identify ways that their county provides services and supports that are culturally responsive to the families in their community.</td>
</tr>
<tr>
<td>K3. The trainee will be able to identify how a social worker’s personal history, culture and professional experiences, training, and biases affect their beliefs and interactions with other people.</td>
</tr>
<tr>
<td>K4. The trainee will be able to recognize how a family’s trauma history (individual, familial, community, and historical) may impact their experience in working collaboratively with the child welfare system.</td>
</tr>
<tr>
<td><strong>Skill</strong></td>
</tr>
<tr>
<td>S1. The trainee will be able to locate the Disparity Indices for their county and using the demographic information, think critically about how families are served in their county.</td>
</tr>
<tr>
<td>S2. The trainee will engage in an initial conversation with their field advisor about their awareness of bias and how it impacts engagement, collaboration, decision-making, and outcomes for children and families.</td>
</tr>
<tr>
<td><strong>Values</strong></td>
</tr>
<tr>
<td>V1. The trainee will allow for an open discussion of possible biases and consider this as an important tool for combatting disproportionality in child welfare practice.</td>
</tr>
<tr>
<td>V2. The trainee will appreciate the cultural differences that exist within the community they serve and their own culture, and the agency’s responsibility to provide culturally responsive services.</td>
</tr>
</tbody>
</table>

Activity

<table>
<thead>
<tr>
<th>Practice Area: Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td>California Core Practice Model Practice Behaviors: 2 (b), 3 (b), 6 (c)</td>
</tr>
<tr>
<td>Estimated Time Required: 2 hours</td>
</tr>
<tr>
<td>Related eLearning/classroom:</td>
</tr>
<tr>
<td>- Fairness and Equity</td>
</tr>
<tr>
<td>- Values and Ethics</td>
</tr>
<tr>
<td>- Trauma-Informed Practice (eLearning and classroom)</td>
</tr>
</tbody>
</table>

Description of Activity:

This activity is designed to introduce new social workers to county specific Disparity Indices data as a way to facilitate a conversation about culturally responsive services and supports, and how bias impacts engagement, collaboration, decision-making, and outcomes for children and families. Additionally, the social worker will review information from kidsdata.org related to Adverse Childhood Experiences for children in their county.

Through this activity, the social worker and field advisor will access the California Child Welfare Indicators Project website and view the Disparity Indices Report for their county and another county in
the state and complete a worksheet related to the information they have located. The social worker and field advisor will also review information related to Adverse Childhood Experiences for their county. Following their review of the Disparity Indices Reports and information about Adverse Childhood Experiences from kidsdata.org, the social worker and field advisor will identify and discuss county policies, available services, and practices that promote fair and equitable treatment for all children, youth, and families interacting with the child welfare system. This will include exploration of how a family’s trauma history may impact collaboration and engagement. The social worker and field advisor will explore ways that bias can be discussed and addressed in day-to-day practice as a way to improve outcomes for children and families.

For the purposes of this activity, the following definitions will be used:

- **Bias**
  - (noun) prejudice in favor of or against one thing, person, or group compared with another, usually in a way considered to be unfair.

- **Culture (from SDM FSNA)**
  - Culture is a system of shared actions, values, beliefs, and traditions that guide the behavior of families and communities. For this item, cultural identity may refer to a family member’s race (African American/Black, American Indian/Alaska Native, Asian/Pacific Islander, Latino/a, multiracial, White, other), ethnicity, tribal affiliation, sexual orientation (heterosexual, gay, lesbian, bisexual), gender identity/expression (female, male, transgender, other), religious/spiritual affiliation, disability, or other social identity that reflects the family's unique characteristics.

### Before the practice opportunity

**Field Advisor Responsibility:**

- Identify any county protocols or policies related to service delivery, especially those that specifically address culturally responsive and/or trauma-informed services and supports.
- Review the county protocols or policies and identify a preliminary list of available services and supports in your county and/or regional office area. Focus on services and supports that specifically emphasize a culturally responsive and trauma-informed approach. Consider the following questions as part of your preparation for the discussion with the social worker:
  - How do your protocols or policies specifically address cultural needs of the family? If your county’s protocols or policies do not specifically address this, how does your agency ensure that the family’s culture is explored and considered when developing a case plan with a family?
  - How do your protocols or policies specifically address the trauma history of the family? If your county’s protocols or policies do not specifically address this, how does your agency ensure that the family’s trauma history is explored and considered when developing a case plan with a family?
  - How do the services and supports provided in your county and/or regional office area address the family’s needs through a culturally responsive and trauma-informed approach?
- If not familiar with the term Adverse Childhood Experiences, review some or all of the following resources:
  - [https://www.cdc.gov/violenceprevention/acestudy/](https://www.cdc.gov/violenceprevention/acestudy/)
Consider how you discuss bias within your agency. What is your comfort level in talking about bias with the social worker? If this is something that you feel uncomfortable with, seek support from a peer, supervisor, manager, or other trusted person in your agency. Think about any reasons you may feel uncomfortable with this topic. Prepare yourself to have a discussion with the social worker about how bias impacts child welfare decisions and outcomes for families. Remember – bias has a broad scope and is not limited to cultural bias.

Social Worker Responsibility:
- Review your notes, handouts, and other materials from the Fairness and Equity classroom module, Values and Ethics classroom module, and Trauma-Informed Practice eLearning and classroom modules.
- If you need some additional refresher information about Adverse Childhood Experiences, review some or all of the following resources:
  - [https://www.cdc.gov/violenceprevention/acestudy/](https://www.cdc.gov/violenceprevention/acestudy/)
  - [https://www.ted.com/talks/nadine_burke_harris_how_childhood_trauma_affects_health_across_a_lifetime](https://www.ted.com/talks/nadine_burke_harris_how_childhood_trauma_affects_health_across_a_lifetime)
- Consider how you discuss bias within your agency. What is your comfort level in talking about bias with your field advisor? If this is something that you feel uncomfortable with, seek support from a peer, supervisor, manager, or other trusted person in your agency. Think about any reasons you may feel uncomfortable with this topic. Prepare yourself to have a discussion with the field advisor about how bias impacts child welfare decisions and outcomes for families. Remember – bias has a broad scope and is not limited to cultural bias.

During the practice opportunity

Note: This activity is designed to be completed by the Social Worker and Field Advisor together.

Social Worker and Field Advisor Responsibility:
- Consider some of the biases that may be present in child welfare practice that are separate from culture. Some examples include:
  - LGBTQ
  - Family planning and abortion
  - AFDC (welfare)
  - Family structure: single parent, multiple parents/fathers
  - Religion
  - Language
  - Patriarchal families vs. matriarchal families
  - Substance use
  - Intimate partner violence
  - Behavioral health disorders
  - Incarceration
Although this list is not all-inclusive, do any of these topics (or others not listed) provoke any strong emotions/reactions for you (either positive or negative)? Share your experiences with the other person to the extent that you are willing.

- NOTE: This may feel uncomfortable to you. It is important to discuss bias even if it is uncomfortable. Keep in mind that we ask families to discuss the most intimate parts of their lives with us. It is important for us to also be able to be reflective of our own feelings and experiences and discuss them in supportive settings in order to ensure fair and equitable treatment of the children and families we serve.

Utilizing the following questions, explore how bias impacts child and family outcomes in child welfare:

- When thinking about the definition of bias provided at the beginning of this activity, does it capture the biases that may be present in your child welfare agency? How does bias show up in your agency? (Consider a broad scope of biases that may be present – not just cultural biases)
- What are some possible outcomes for children and families if these biases go unaddressed?
- Have there been other biases that have surfaced for you outside of race and culture?
- What could happen if your biases around these other areas topics go unaddressed? What are possible outcomes for children and families?
- How can you (personally) address bias on a day-to-day basis in your agency?

Recognizing that disproportionality exists in child welfare, it is important to understand how bias (intentional and unintentional) can lead to poor outcomes for children and families. The data that you will look at as part of this exercise is designed to help you self-reflect on your practice and the impact each and every decision has on long-term outcomes.

Please complete the following three parts related to data to help you better understand the link between practice and outcomes in child welfare.

PART 1:

- Access your county’s Disparity Index on the California Child Welfare Indicators Project website:
  - Click “Next”
  - In the first column, select “California”, in the second column select your county, in the third column, select “In Care”
  - Click “Finish”

- Based on the information provided, complete the items related to Disparity Indices on the Fairness and Equity Field Activity worksheet

PART 2:

- Access information related to Adverse Childhood Experiences in your county on the kidsdata.org website:
  - http://www.kidsdata.org/
  - Click on “Data by Topic”
  - Click on “Child and Youth” Safety
Based on the information provided, complete the items related to Adverse Childhood Experiences on the Fairness and Equity Field Activity Worksheet.

Repeat this process with “Prevalence of Adverse Childhood Experiences (Adult Retrospective)”

Part 3:

Identify protocols and policies in your county related to service delivery. Review the protocols and policies. Answer the questions on your Fairness and Equity Field Activity Worksheet related to services and supports.

Following completion of the Fairness and Equity Field Activity Worksheet, review the information with the social worker. If you completed the worksheet together, discuss what you learned from looking at the Disparity Indices and the data related to Adverse Childhood Experiences. If you completed the worksheets separately, review the worksheets together. Note if there are any differences to your answers.

**After the practice opportunity**

**Field Advisor and Social Worker Responsibility:**

Think about any questions you may still have after completing the activity. Consider possible resources in your county that will help you to answer your questions.

For additional information regarding trauma and resiliency, please utilize the following resource link for the article: Advanced Social Work Practice in Trauma

http://www.cswe.org/File.aspx?id=63842
## DISPARITY INDICES

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHICH POPULATIONS ARE OVER-REPRESENTED IN THE CHILD WELFARE SYSTEM IN CALIFORNIA?</td>
<td>(The percentage in care is MORE than the general population.)</td>
</tr>
<tr>
<td>WHICH POPULATIONS ARE OVER-REPRESENTED IN THE CHILD WELFARE SYSTEM IN YOUR COUNTY?</td>
<td>(The population in care is MORE than the general population.)</td>
</tr>
<tr>
<td>WHICH POPULATIONS ARE UNDER-REPRESENTED IN THE CHILD WELFARE SYSTEM IN CALIFORNIA?</td>
<td>(The percentage in care is LESS than the general population.)</td>
</tr>
<tr>
<td>WHICH POPULATIONS ARE UNDER-REPRESENTED IN THE CHILD WELFARE SYSTEM IN YOUR COUNTY?</td>
<td>(The percentage in care is LESS than the general population.)</td>
</tr>
</tbody>
</table>

**WHAT DO YOU NOTICE ABOUT YOUR COUNTY’S DISPARITY INDICES REPORT? ARE THERE ANY SURPRISES?**

**WHAT ARE SOME POSSIBLE IMPACTS FOR OVER-REPRESENTED AND UNDER-REPRESENTED POPULATIONS?**

**HOW DOES YOUR COUNTY TALK ABOUT DISPROPORTIONALITY AND DISPARITY IN THE CHILD WELFARE POPULATION?**
## Adverse Childhood Experiences

**What was the percentage of children (reported by a parent) to have experienced two or more adverse childhood experiences in your county?**

**What was the percentage of households who have experienced adverse childhood experiences (retrospective report) in your county?**

**When you consider the adverse childhood experiences categories (emotional abuse, physical abuse, sexual abuse, intimate partner violence, household substance use, household mental illness, parental separation or divorce, incarcerated household member), which ones provoke strong feelings for you? Consider if these are positive or negative feelings. What are some possible ways that a child or parent’s trauma history may impact your assessment, case planning, or service delivery with that family?**
ENGAGEMENT BLOCK FIELD ACTIVITIES

<table>
<thead>
<tr>
<th>Field</th>
<th>Interviewing 3 hours</th>
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<tbody>
<tr>
<td></td>
<td>Exploring Family, Extended Family, Community and Tribal Connections 2 hours</td>
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</tbody>
</table>

Interviewing

*Learning Objectives*

**Field Training: Interviewing (3 hours)**

**Knowledge**

K1. The trainee will be able to recognize that a child’s or adult’s ability to comprehend and respond to questions is limited by their level of cognitive, emotional, and linguistic development.

K2. The trainee will be able to identify the phases of an interview.

K3. The trainee will be able to describe appreciative inquiry or some of the ‘keys to engagement’ and how these strategies could be used in an interview.

K4. The trainee will be able to describe effective strength-based interviewing strategies for defusing conflict and assisting family members, caregivers, youth, or stakeholders to openly discuss their opinions and feelings while working through disagreement and remaining engaged.

**Skill**

S1. The trainee will be able to demonstrate the use of appreciative inquiry and/or some of the ‘keys to engagement’ while gathering information about one of the following:
   a) Values, beliefs and behaviors
   b) What’s working well, worries, and next steps
   c) Family, caregiver, or youth’s underlying needs, protective capacities, and resources

S2. The trainee will be able to demonstrate comprehensive case documentation in CWS/CMS following the interview.

**Values**

V1. The trainee will value the skillful use of power and authority in the interview process.

V2. The trainee will value learning about the interviewees’ values, beliefs and behaviors and eliciting family strengths and resources, especially when engaging in a difficult conversation.

V3. The trainee will value effectively working through disagreement as a way to engage and build trust.

*Activity*
**Practice Area:** Engagement

**California Core Practice Model Practice Behaviors:** 1 (a-f), 2 (b), 3 (a-c), 4 (a-g), 5 (a-d)

**Estimated Time Required:** 3 hours

**Related eLearning/classroom:**
- Interviewing
- Respect, Courtesy, and Skillful Use of Authority
- Engagement and Interviewing

**Description of Activity:**
The trainees will prepare for and complete an interview with a family member, caregiver, youth, or stakeholder.

In preparing for the interview, the trainee will:
- Identify the participants, information to be collected, and goals of the interview
- Identify the developmental, cultural, and trauma considerations when conducting the interview
- Discuss with the field advisor how power and skillful use of authority impacts engagement

Following the interview, the trainee will reflect on what worked well, any challenges or opportunities for upgrade during the interview, and next steps.

**Before the practice opportunity**

**Field Advisor Responsibility:**
- Meet with the trainee and ensure the trainee has access to either engage directly, or co-engage in an interview with a child, youth and/or adult. Work with the trainee to select a person to interview for this field activity.
- Discuss with the trainee the goals for the interview. Determine if the focus will be on investigation and assessment or case management related to the referral and/or case plan. Determine what SDM tools may apply to the referral or case and review the questions and definitions with the trainee. Another option may include preparing for a resource family interview.
- Discuss with the trainee the appropriateness of including a cultural broker, parent partner, or youth advocate in the interview. For ICWA cases, ensure that the interview is coordinated with the tribal representative.
- Review the keys to engagement, appreciative inquiry, and/or solution focused questions, as well as possible question style and content.
- Review differences in interviewing children, especially if the interviewee selected is a child.
- Discuss (and demonstrate if necessary) which CMS/CWS fields will need to be entered to complete the narrative of the interview.
- Review any county specific procedures regarding CMS/CWS and answer any questions the trainee has about entering information into CMS/CWS.
- Discuss the skillful use of authority and power with the trainee and how the person being interviewed may react to interventions by a government agency. Some possible questions for discussion include, but are not limited to:
  - Is this the first time the interviewee is being contacted by child welfare services? Does the interviewee have a history of contact with child welfare services? Is so, what does the previous history show how the interviewee engaged with previous staff?
- Is there a potential cultural dynamic that the interviewee has had with previous government entities that may impact engagement?
- Develop potential strategies for the interview if the family has a history of non-engagement with the agency. Consider and choose potential solution focused questions to introduce in the interview.

**Social Worker Responsibility:**
- Ask any questions necessary to clarify the purpose of the interview and the questioning strategies that will be used in the interview.
- Check with the field advisor about taking notes during the interview per county practice, policy and procedure.
- Review potential biases or barriers that may impact the effectiveness of the interview.
- Have a list of resources available to bring to the interview (if applicable).

| During the practice opportunity |

**Social Worker Responsibility:**
- Conduct the interview. Utilize keys to engagement or appreciative inquiry strategies and take note of questions by the interviewee that the trainee cannot answer in the moment.
- Note the phases of the interview as they happen.
- Identify strengths of the interviewee, dispense information or provide a list of resources for the interview.
- Identify opportunities for the interviewee to collaborate on solutions to concerns and worries that have been raised.
- Clarify discrepancies or questions you have of the interviewee.
- During closure, be clear about the next steps (next interview, transition, how and when questions will be addressed) and identify timelines in which these will be completed.
- Request assistance if needed for ensuring the needed information is obtained or feeling like the interviewee is not engaged or is not responding to de-escalation strategies.

**Field Advisor Responsibility:**
- Answer any questions the trainee may contact you with if contacted during the interview.
- If present during the interview, intervene in the interview if trainee is having difficulty in engaging and obtaining needed information from interviewee.

| After the practice opportunity |

**Field Advisor Responsibility:**
- Review with the trainee the contact with the interviewee, using the Three Questions: What went well? What are the worries? What needs to happen, upgrades?
- Review the trainee the objectives of the interview and if they were met, including having the information needed for the appropriate SDM tool(s) that apply.
- Review with the trainee and identify specific statements and questions that the trainee used that were one of the following: strengths, the three questions, or keys to engagement (solution focused questions) or a focus on style and content of the questions being asked.
- Review with the trainee feelings or biases that may have emerged during the interview.
  - How might have feelings or biases impacted the interview?
• What did the trainee do in the moment of awareness that a feeling or bias emerged during the interview? What might have been done differently?
• Discuss any strategies and/or actions that should be taken if feelings and/or biases appear to be impacting the effectiveness of the interview.

☐ Review the practice of what will go into documenting the contact. Documentation should reflect concrete and unbiased description of what occurred during the interview.
☐ Review how the social worker’s use of authority may have impacted engagement of the interviewee.

Social Worker Responsibility:
☐ Be prepared to analyze content and process of the interview.
☐ Complete required narrative into CMS/CWS per county policy and procedure.
☐ Any follow up (questions, activities, etc.) that were agreed upon with the interviewee be completed by the identified timeframes.
Exploring Family, Extended Family, Community, Tribal Connections, and Relationships

Learning Objectives

Field Activity: Exploring Family, Extended Family, Community, Tribal Connections, and Relationships (2 hours)

Knowledge
K1. The trainee will identify where information about family members and relationships is recorded in CWS/CMS.
K2. The trainee will identify the benefit of engaging a child, youth, parent/caregiver, family, and tribe in gathering information about family members for the purpose of identifying permanent connections and a safety network.
K3. The trainee will identify the role of culture and cultural identity when gathering information about permanent connections.

Skill
S1. The trainee will be able to review a case file to obtain/confirm information about family members to identify permanent connections and a safety network.
S2. The trainee will be able to:
   a) Develop a genogram, eco-map or safety circle on an active case OR
   b) Develop a genogram, eco-map or safety circle from a case file review
S3. The trainee will demonstrate their knowledge of the family’s Native American ancestry and/or cultural identity through one of the following options:
   a) Case file review
   b) Inquiry with the family

Values
V1. The trainee will seek to identify and document family relationships, extended family, community connections, and tribal connections as ways to help children and youth develop and maintain their sense of identity and connection to a family and community.

Activity

Practice Area: Engagement
California Core Practice Model Practice Behaviors: 4 (a-g), 5 (a-d), 6 (a-c)
Estimated Time Required: 3 hours
Related eLearning/classroom:
- Respect, Courtesy, and Skillful Use of Authority
- Interviewing
- Engagement and Interviewing

Description of Activity:
Utilizing an active case or case file review, the trainee will develop a genogram, eco-map, or safety circle to help identify family, extended family, community, and tribal connection that may serve as support people and permanent connections for children, youth, and families.

*Ecomap example to be found under Supplemental Materials*
Before the practice opportunity

**Field Advisor Responsibility:**
- Review Ecomap, Genogram and Safety Circle concepts to ensure familiarity with the tools.
- Work with the social worker to determine if the activity will be completed using an active case or a case file review. If using an active case, select a case with the social worker for the activity. Ideally, this would be a family for which an Ecomap, Genogram, or Safety Circle has not been previously completed. If using a case file review, ensure that the social worker has access to the physical case and the CWS/CMS case record.
- Discuss county practice and/or what is the best tool for this specific family/circumstance.
- Review any cultural and/or language considerations when planning for the activity.
- Review where or how the family information will be obtained.
  - What are some possible information sources for obtaining the information?
    - CWS/CMS
    - Child, youth, parents, family members, extended family members, and tribal connections
    - Service providers
    - Other
  - If working with an active case, when and how will this be discussed with the family?
    - Family Team Meeting or other case planning type of meeting
    - Individual conversations with child, youth, parents, family members, extended family members, and tribal connections
    - Other
- If working with an active case, discuss how the Ecomap, Genogram, or Safety Circle will be explained to the child, youth, parent, family, extended family, and tribal connections. Encourage the social worker to practice how they will describe the selected tool and its purpose using language that is understandable to all.
- If the social worker is utilizing a family team meeting or other case planning type of meeting for this activity, determine if the field advisor will be attending the meeting. If attending the meeting to observe the social worker’s practice, determine the role of the field advisor in the meeting (observer or participant).

**Social Worker Responsibility:**
- Through discussion with the field advisor determine if the activity will be completed using an active case or a case file review. If using an active case, select a case with the field advisor for the activity. Ideally, this would be a family for which an Ecomap, Genogram, or Safety Circle has not been previously completed. If using a case file review, select a family with the field advisor for the activity.
- Discuss any cultural and/or language considerations for completing the activity.
- Review the family’s case file and CWS/CMS to determine the family dynamics and information for the tool. This should include child/family strengths, needs, people, culture, supports, etc. If completing this activity with an active case, some of this information may be know prior to talking with the family and some of the information may come from the family and others during the activity.
- If utilizing a family team meeting or other case planning type of meeting for this activity, discuss with the field advisor if they will be attending the meeting and what role they will be in during the meeting (participant or observer).
- If you are planning to use an active case for the activity, be sure to do the following:
Practice how you will describe the selected tool and its purpose using language that is understandable to all.

Contact the family about who should be invited to the meeting (if applicable).

Identify time/date/location of the meeting in partnership with the family to include family voice and choice (if applicable).

Identify with the family the purpose and context of the meeting (if applicable).

During the practice opportunity

Social Worker Responsibility:
- Complete the identified tool (Ecomap, Genogram, or Safety Circle) to explore family, extended family, community, tribal connections, and relationships.

If utilizing a family team meeting or other case planning type of meeting, be sure to do the following:
  - Explain the purpose of the meeting and the information that will be discussed in language that is understandable to all.
  - Facilitate introductions and create group agreements.
  - Ask about any cultural considerations. Is there anything the team should know before developing the Ecomap, Genogram, or Safety Circle? Does the family have any Native American ancestry?
  - Explore if there is anyone not at the meeting who should be.
  - After completing the tool, review it with the team and check to see if there is any information missing.

If you have identified missing information during the completion of the tool, develop a plan/next steps for obtaining the missing information.

Field Advisor Responsibility:
- Be available to answer questions the social worker may have.

If participating in or observing a family team meeting or other case planning type of meeting, take note of the following:
  - How did the social worker engage with the family?
  - Did the social worker discuss cultural consideration and cultural identity with the family?
  - Did the social worker ask about Native American ancestry or heritage?
  - Did the social worker work with the family and team to identify relatives, extended family members, and other support people?

After the practice opportunity

Field Advisor Responsibility:
- Review the completed tool and CWS/CMS documentation with the social worker. Provide feedback about the accuracy of the information and the completion of the tool.

Identify any information that may be missing on the completed tool. Develop a plan with the social worker to obtain the missing information (if appropriate).

If the social worker completed the tool on an active case using a family team meeting or another case planning type of meeting, review the following:
  - What strategies did they use to engage the family?
  - What is your awareness of the family’s culture or cultural identity?
What could you do to improve this next time (either with this family or another family)?

What are any next steps with the family?

- Provide feedback to the social worker about what was observed during the family team meeting or other case planning type of meeting (if applicable).

**Social Worker Responsibility:**
- Document the information from the completed tool in CWS/CMS.
- Review the completed tool and the CWS/CMS documentation with the field advisor.
- Reflect on what worked well, what you are worried about, and what you could have done differently for this activity.
- Discuss with the field advisor how you are going to use what you learned from the activity going forward in your work with families.
- In a follow-up visit, debrief with the family (if applicable). Use this as an opportunity to learn more about the family.
ASSESSMENT BLOCK FIELD ACTIVITIES

<table>
<thead>
<tr>
<th>Block 3 – Assessment</th>
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</table>
| **Field** | Completing Assessment Tools  
2 hours |
| | Collaborative Assessment, Planning, and Support: Safety and Risk in Teams  
3 hours |

**Completing Assessment Tools**

*Learning Objectives*

**Field Activity: Completing Assessment Tools (2 hours)**

**Knowledge**

K1. The trainee will be able to identify county protocols related to the use of the Structured Decision Making (SDM) assessment tools.

**Skill**

S1. The trainee will be able to apply SDM definitions and complete the following tools:

a. Hotline Assessment Tool, Safety Assessment Tool, Substitute Care Provider Safety Assessment Tool, **OR** Reunification Assessment Tool

**AND**

b. Family Risk Assessment Tool (Emergency Response), Family Risk Reassessment for In-Home Cases Tool (Family Maintenance), **OR** Reunification Reassessment Tool (Family Reunification)

**Values**

V1. The trainee will value following SDM policies and county protocols for the SDM assessment system.

**Activity**

*Practice Area: Assessment*

*California Core Practice Model Practice Behaviors: 7 (a-f)*

*Estimated Time Required: 2 hours*

**Description of Activity:**

Trainee will complete **one** of the following safety tools:

- Hotline Assessment Tool
- Safety Assessment Tool
- Substitute Care Provider Safety Assessment Tool
- Reunification Reassessment Tool

**AND**

The trainee will complete **one** of the following risk tools:

- Family Risk Assessment Tool (Emergency Response)
- Family Risk Reassessment for In-Home Cases Tool (Family Maintenance)
- Reunification Reassessment Tool (Family Reunification)
The activity must be completed using the SDM Policy and Procedure Manual. The trainee will select one of the following options for the activity:

1) ACTIVE CASE: Select an active case or referral to complete the SDM tools. **(Note: If the trainee is assigned or has reasonable access to a case for which an SDM Assessment is required, the trainee MUST choose this option.)**

2) CASE REVIEW: Select a case or referral to review. The trainee will review information in CWS/CMS and the physical case in order to complete the SDM tools. **(Note: This option is intended ONLY for trainees without access to a case for which an SDM Assessment is required.)**

Completion of SDM tools are critical to social work practice and the assessment of safety and risk. While not all social workers will be required to complete SDM tools as part of their day-to-day case management responsibilities, all social workers are responsible for understanding how decisions have been made in the case and the experience of families throughout the child welfare system. Safety is at the heart of all decisions made in child welfare. All social workers are assessing for safety no matter their assignment in the child welfare system.

### Before the practice opportunity

**Field Advisor Responsibility:**

- Meet with the trainee and ensure the trainee has access to SDM documents and the SDM Policy and Procedure Manual.

- Provide information to the trainee about the importance of SDM assessments throughout the life of the case and how tool completion impacts decisions made by child welfare. Information from SDM assessments are utilized throughout the life of the case and become part of the case record.

- Determine with the trainee which option from the activity description above (active case or case file review) is most appropriate. Some considerations include: trainee’s case/caseload assignment, trainee’s position and job responsibilities within the agency.

- Work with the trainee to select a case for this field activity. If using option 1, ensure that the trainee will have an opportunity to meet with the family to gather information. If using option 2, ensure that the trainee has access to the physical case file and CWS/CMS documentation to gather information.

- Discuss with the trainee which SDM assessment tools will be used for the activity (based on the trainee’s caseload):
  - Hotline Assessment Tool
  - Safety Assessment Tool
  - Substitute Care Provider Safety Assessment Tool
  - Reunification Reassessment Tool
  - Family Risk Assessment Tool (Emergency Response)
  - Family Risk Reassessment for In-Home Cases Tool (Family Maintenance)
  - Reunification Reassessment Tool (Family Reunification)

- Review any county specific procedures regarding completing assessment tools and answer any questions the trainee has about using the SDM tools.
Social Worker Responsibility:
- Ask any questions necessary to clarify the process for this activity or the use of SDM tools.
- If not able to access web SDM, work with the field advisor to obtain hard copies of the SDM tools needed and the SDM Policy and Procedure Manual.

**During the practice opportunity**

Social Worker Responsibility:
- Review the SDM tools that will be completed for the selected case.
- Collect information through conversation with the family or through case record review to complete the SDM tools.
- Complete the SDM tools using the SDM Policy and Procedure Manual. *Note: Pay special attention to the definitions provided in the SDM Policy and Procedure Manual and ensure thorough review of case information to determine which SDM definition(s) apply.*

Field Advisor Responsibility:
- Answer any questions the trainee has about using the SDM tools for the selected case.

**After the practice opportunity**

Field Advisor Responsibility:
- Review the completed SDM tools with the trainee.
- Verify that the information used by the trainee is accurate. This may be done by reviewing the case with the trainee and the completed SDM tool. The field advisor should go through each section of the completed SDM tool and the associated definitions from the SDM Policy and Procedure Manual with the trainee and have a discussion about each. Some questions for discussion:
  - Where did the information come from? Is this information documented in the case?
  - How do we know?
  - If the information is unknown, how/where can the information be obtained?
  - Does the information available meet the definition in the SDM Policy and Procedure Manual?
  - Were any overrides used? If so, why?
  - Ask the trainee to identify potential situations, which would cause them to mark other information on the tool.
  - If the tool as completed does not completely take the trainee through the full use of the tool (i.e.: No Safety Threat, Recommendation to Continue FR services therefore Skipping Reunification Safety Assessment) then pose questions or have the trainee work completely through the tool to get a full scope of how to navigate it.
- Discuss use of the tool with the trainee and any next steps for the trainee related to SDM tools.
- Complete the Field Advisor Assessment Block Field Activity #1: Completing Assessment Tools
Social Worker Responsibility:

- Reflect on how the SDM tools were completed. Did you use the definitions? Was there information that appeared to be missing after reviewing the completed tool? How will you go about collecting the needed information? How will you document the information that was obtained in the case file?

- Reflect on how the process of collecting information for completion of the tool may impact future decisions for the case and how information may be used in the future.

- Reflect on the final recommendation of the assessment tool. Is this consistent with your professional assessment of the situation? If not, consider why there may be a discrepancy. Discuss this with your field advisor.

- Complete the Social Worker Assessment Block Field Activity #1: Completing Assessment Tools
  
Collaborative Assessment, Planning, and Support: Safety and Risk in Teams

Observation Activity Option
Identify a case for which a team meeting to discuss safety and/or safety planning 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: Safety and Risk in Teams (3 hours) |
| Knowledge |
| K1. The trainee will be able to identify the safety and risk assessment information that teams need to develop safety plans. |
| K2. The trainee will be able to identify strategies for how he/she will engage the family in the process. |
| Skill |
| S1. The trainee will be able to develop a safety plan with a child and family team. |
| OR |
| S2. The trainee will observe a child and family team meeting and complete an observation tool. |
| Values |
| V1. The trainee will value the role of the team in developing a safety plan. |

Activity

| Practice Area: Assessment |
| California Core Practice Model Practice Behaviors: 1 (a-f), 3 (a-c), 4 (a-g), 7 (a-f), 8 (a-e), 9 (a-f), 10 (a-c), 12 (a-h) |
| Estimated Time Required: 3 hours |

Description of Activity:
The trainee will participate in a team meeting with a family on his/her caseload OR observe a team meeting with the permission of the social worker and the family. Team meetings may include a TDM, safety mapping, Child Family Team meeting, or any other meeting that brings the family together with the child welfare agency to discuss safety and safety planning. At the conclusion of the meeting, the trainee will have participated in developing a plan that ensures safety for the child/youth or will have completed an observation tool related to the discussion of safety and risk in the team meeting.

Before the practice opportunity

Field Advisor Responsibility:
- Become familiar with the safety and risk definitions in the SDM policy and procedure manual.
  Have a copy of the manual available for reference during the meeting with the trainee.
- Determine with the trainee which option from the activity description above (active case or observation) is most appropriate. Some considerations include: trainee’s case/caseload assignment, trainee’s position and job responsibilities within the agency.
- Work with the trainee to select a case for this field activity.
- Work with the trainee to identify a case for which a team meeting to discuss safety and/or safety planning 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 safety plans.
- 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 decision. 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 safety and/or safety planning 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 safety 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.

### 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 decision. *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?
- Complete the Field Advisor Assessment Block Field Activity #2: Collaborative Assessment, Planning, and Support: Safety and Risk in Teams
  - [https://dc-viawest.qualtrics.com/jfe/form/SV_bji2k0FzmP8eZHT?Brand=berkeleyssw](https://dc-viawest.qualtrics.com/jfe/form/SV_bji2k0FzmP8eZHT?Brand=berkeleyssw)

**Social Worker Responsibility:**
- Discuss the completed observation worksheet (Appendix A) 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 safety and/or safety planning.
- Reflect on one thing that you would like to try when you facilitate or participate in a team meeting in the future?
Complete the Social Worker Assessment Block Field Activity #2: Collaborative Assessment, Planning, and Support: Safety and Risk in Teams

- [https://berkeleyssw.co1.qualtrics.com/SE/?SID=SV_0IAkYgAxKLD7Jb](https://berkeleyssw.co1.qualtrics.com/SE/?SID=SV_0IAkYgAxKLD7Jb)
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.

<table>
<thead>
<tr>
<th>Question</th>
<th>Trainee Notes</th>
</tr>
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<tbody>
<tr>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>Did the meeting include a discussion about what the family, the safety network, and the agency are worried about (concerns)? If yes, describe how this was done?</td>
<td></td>
</tr>
<tr>
<td>Describe how safety and risk information was talked about in the meeting?</td>
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<tr>
<td>Describe how the family’s circle of support/safety network was explored?</td>
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<tr>
<td>Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the process?</td>
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<tr>
<td>Was a safety plan developed or revisited during the meeting? If yes, describe how the safety plan keeps the child/youth safe. Remember: “services do not equal safety”!</td>
<td></td>
</tr>
<tr>
<td>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? [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.]</td>
<td></td>
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<tr>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>Overall, do you think the meeting goal was met? Why or why not?</td>
<td></td>
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</tbody>
</table>
Collaborative Assessment, Planning, and Support: Safety and Risk in Teams

**Active Case Activity Option**
Select an active case for which a team meeting to discuss safety and/or safety planning is needed or scheduled. (Note: If the trainee is assigned 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, the trainee MUST choose this option.)

**Learning Objectives**

<table>
<thead>
<tr>
<th>Field Activity: Collaborative Assessment, Planning, and Support: Safety and Risk in Teams (3 hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Knowledge</strong></td>
</tr>
<tr>
<td>K1. The trainee will be able to identify the safety and risk assessment information that teams need to develop safety plans.</td>
</tr>
<tr>
<td>K2. The trainee will be able to identify strategies for how he/she will engage the family in the process.</td>
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<tr>
<td><strong>Skill</strong></td>
</tr>
<tr>
<td>S1. The trainee will be able to develop a safety plan with a child and family team.</td>
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<tr>
<td>OR</td>
</tr>
<tr>
<td>S2. The trainee will observe a child and family team meeting and complete an observation tool.</td>
</tr>
<tr>
<td><strong>Values</strong></td>
</tr>
<tr>
<td>V1. The trainee will value the role of the team in developing a safety plan.</td>
</tr>
</tbody>
</table>

**Activity**

<table>
<thead>
<tr>
<th>Practice Area: Assessment</th>
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</thead>
<tbody>
<tr>
<td><strong>California Core Practice Model Practice Behaviors:</strong> 1 (a-f), 3 (a-c), 4 (a-g), 7 (a-f), 8 (a-e), 9 (a-f), 10 (a-c), 12 (a-h)</td>
</tr>
<tr>
<td><strong>Estimated Time Required:</strong> 3 hours</td>
</tr>
</tbody>
</table>

**Description of Activity:**
The trainee will participate in a team meeting with a family on his/her caseload OR observe a team meeting with the permission of the social worker and the family. Team meetings may include a TDM, safety mapping, Child Family Team meeting, or any other meeting that brings the family together with the child welfare agency to discuss safety and safety planning. At the conclusion of the meeting, the trainee will have participated in developing a plan that ensures safety for the child/youth or will have completed an observation tool related to the discussion of safety and risk in the team meeting.

**Before the practice opportunity**

**Field Advisor Responsibility:**
- Become familiar with the safety and risk definitions in the SDM policy and procedure manual. Have a copy of the manual available for reference during the meeting with the trainee.
- Determine with the trainee which option from the activity description above (active case or observation) is most appropriate. Some considerations include: trainee’s case/caseload assignment, trainee’s position and job responsibilities within the agency.
Work with the trainee to select a case for this field activity.

Identify with the trainee an active case that requires a team meeting to discuss safety and/or safety planning.

Identify with the trainee what role he/she will be playing in the meeting (facilitator, participant, or other).

Meet with the trainee and discuss the purpose of the family team meeting.

Discuss with the trainee their role in the meeting. Check for understanding about the social worker’s role and responsibilities in the meeting.

Discuss with the trainee who is part of the family’s circle of support and/or safety network. Who should participate in the team meeting?

Discuss with the trainee how the family’s culture and trauma history may have an impact on the meeting. How has the trainee explored this with the family?

Discuss with the trainee how participants will be prepared for the meeting.

- For example:
  - What prompted the meeting?
  - Who should participate in the meeting?
  - Who does the family want to participate in the meeting?
  - Who does the youth want to participate in the meeting?
  - Who does the child welfare agency want to participate in the meeting?
  - Is each participant aware of the meeting? How is the social worker going to ensure the right people participate in the meeting?
  - What is each participant’s understanding about why the meeting is taking place? How do we know?
  - Does any participant have questions or concerns about the meeting?
  - How will details about the meeting be communicated with the family’s circle of support or safety network?

Discuss documents, materials, or other information that may be needed prior to the meeting in order to develop an adequate plan to meet the safety needs of the child/youth. This includes any safety and risk assessment tools and county policies and procedures regarding safety plans.

The field advisor will assist the trainee in developing a description that identifies the teaming process as a collaboration with families and their network to understand their perspective and build shared understanding about the safety and risk concerns.²

Discuss how safety and risk assessment tools will be presented in the meeting. Practice how safety and risk assessments will be explained to the participants.

Direct the trainee to any helpful resources to prepare for the meeting (such as the Worker’s Guide for Social Workers in the TDM Toolkit, Structured Decision Making Policy and Procedures Manual, Safety Organized Practice Modules, or Safety Organized Practice: Practice Profiles).

Social Worker Responsibility:

- Gather balanced information about the family and the issue to be discussed. Information should include what’s working well for the family and what the child welfare agency and family are

² Adapted from California’s Practice Profiles (University of California, Davis, Northern Training Academy) – Safety Mapping: Purpose
worried about. Be knowledgeable about the family, the current circumstances, assessments completed, and relevant history, taking into consideration the family’s culture and trauma history.

- Talk about any 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 mental health, intimate partner violence, or substance abuse.
- Ask any questions necessary to clarify the process and the role of the social worker in the family team meeting
- Explore family relationships and natural circles of support. Encourage the family to identify natural supports to be included on their team.³
- Communicate with team members about the meeting to help them understand the purpose/process of the family team meeting.⁴ (Identify method of communication to be used with each team member: telephone, in-person, email, etc.)
- Work collaboratively with the meeting participants to plan the meeting and establish a clear purpose for the meeting. Participants are able to articulate the purpose of the meeting and feel included in the planning process.
- Ensure that all documents, materials, or other information identified during the meeting with the field advisor are collected and available for the family team meeting.

³ Adapted from CAPP Behaviors
⁴ Adapted from California’s Practice Profiles (University of California, Davis, Northern Training Academy) – Safety Mapping: Stakeholders
During the practice opportunity

Field Advisor Responsibility:
- Observe the trainee facilitating or participating in the team meeting. As an observer, please note that the observer does not participate in the meeting, ask questions, or provide input about the decision. Work with the social worker to obtain the family’s permission to sit in on the meeting.
- If the field advisor would normally participate in the meeting, the field advisor should continue to participate in the meeting. Instead of observing the trainee, the field advisor will contribute to the meeting and prompt the trainee if needed by asking questions to help elicit any pertinent information. As a participant, the field advisor may ask additional questions and clarify or reframe information if needed.

Social Worker Responsibility:
- Create an environment for open and honest communication with the family and the family team.
- Be transparent about the purpose of the meeting and relevant court timeframes (if applicable) so that the team’s planning and decision-making is informed, relevant, and timely.²
- Engage the family in discussing their concerns, their thoughts about what is working well for them, and their plans for ensuring the safety of the children and youth in the family.
- Actively participate in the meeting by providing relevant case information and asking solution focused questions. Be behaviorally specific when discussing the purpose of the meeting, what is working well, what the child welfare agency and family are worried about, and what needs to happen next to ensure the safety and well-being of the child/youth.
- Discuss information from the safety and risk assessment tools that have been completed.
- Promote self-advocacy by encouraging, supporting, and providing opportunities for youth and families to actively share their voice, offer solutions, act as leaders and be central in assessment, planning and decisions about their lives.⁶
- Develop a safety plan with the family and ensure that the safety plan addresses any safety threats that had been identified during the meeting.
- Explore with team members what roles they can play over time to strengthen and support the family.⁷
  - Ensure that each participant in the safety plan understands any role/responsibility he/she has in ensuring the child/youth’s safety.

After the practice opportunity

Field Advisor Responsibility:

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² Adapted from CAPP Behaviors
⁶ Adapted from CAPP Behaviors
⁷ Adapted from CAPP Behaviors
- Debrief with trainee regarding the meeting process. The debrief should occur after the social worker's self-reflection.
  - Ask the social worker about what they did well in the meeting and any upgrades/challenges during the meeting.

- Provide feedback to the trainee about what worked well during the meeting and any suggestions to enhance practice.

- Provide feedback on the safety plan and how it meets the family's needs.

- Complete the Field Advisor Assessment Block Field Activity #2: Collaborative Assessment, Planning, and Support: Safety and Risk in Teams
  - [https://dc-viawest.qualtrics.com/jfe/form/SV_bji2k0FzmP8eZHT?Brand=berkeleyssw](https://dc-viawest.qualtrics.com/jfe/form/SV_bji2k0FzmP8eZHT?Brand=berkeleyssw)

Social Worker Responsibility:

- Reflect on your use of safety and risk tools during the meeting (if applicable).
- Reflect on your efforts to engage the family in the meeting process and safety planning.
- Reflect on the safety plan. Include discussion of the follow-up needed by the social worker to support the plan.

- Complete the Social Worker Assessment Block Field Activity #2: Collaborative Assessment, Planning, and Support: Safety and Risk in Teams
  - [https://berkeleyssw.co1.qualtrics.com/SE/?SID=SV_0IAkYgAxbKLD7Jb](https://berkeleyssw.co1.qualtrics.com/SE/?SID=SV_0IAkYgAxbKLD7Jb)
### Collaborative Assessment, Planning, and Support: Initial Case Plan

#### Observation Activity Option

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
  

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](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_40b3VOVL3uLIdHy](https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_40b3VOVL3uLIdHy)
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.

<table>
<thead>
<tr>
<th>Question</th>
<th>Trainee Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>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?</td>
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<tr>
<td>Describe how SDM tools (Safety Assessment, Risk Assessment, Family Strengths and Needs Assessment) were talked about in the meeting.</td>
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<tr>
<td>Describe how the family’s circle of support/safety network was engaged in the case planning process.</td>
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<tr>
<td>Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the case planning process.</td>
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<tr>
<td>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?</td>
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<tr>
<td>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?</td>
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**Active Case Activity Option**

Select an active case for which a team meeting to discuss case planning and service delivery is needed or scheduled. (Note: If the trainee is assigned 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, the trainee MUST choose this option.)

**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. |
| d. Identifying and focusing on underlying needs, shared goals, and decision criteria throughout the process |
| e. Emphasizing common factors that promote consensus in the group discussion |
| f. 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

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- Case Planning Basics
- Writing Behavioral Objectives
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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:

☐ Review Field Advisor Guide
Review Learning Objectives
Review the SDM Safety Assessment, Risk Assessment and FSNA tools to focus the case plan development meeting
Meet with the social worker to:
  o Create agreements, discuss learning style, and establish feedback loop
  o Explore comfort level with SDM tools
  o Review SMART Objective process
  o Identify a case for the activity
Discuss with the social worker what may be needed prior to the meeting to feel prepared? Utilizing a scaling question, have the social worker scale their comfort level and experience with developing a case plan with a family. Some follow up questions may include:
  o What has gotten you to a ___? How have you prepared to facilitate a case planning meeting with the family?
  o What would it look like to move up one step on the scale? What would the social worker be able to demonstrate that shows they are prepared to develop a case plan with the family?
Work with the social worker to prepare a preliminary danger statement or summary of the safety threats, which uses language that would be understandable to the family.

Social Worker Responsibility:
Ask any questions or clarify expectations for the activity.
Review:
  a. SMART Objectives
  b. Case Plan Field Tool
Reflect on personal bias that may impact the development of the case plan
Discuss where the meeting will take place: date/time/location (preferably the family's home)
Have a conversation with the family and their identified safety network about:
  a. Who will attend?
  b. What can they expect?
  c. What are any cultural considerations that the team should discuss or be aware of?

During the practice opportunity

Field Advisor Responsibility:
Observe the social worker’s use of engagement skills, solution focused questions, appreciative inquiry, and strength-based language
Help to ensure that the language used is family friendly, understandable and culturally sensitive. Help to reframe statements or clarify if needed.
Ensure SMART objectives and services are related to the safety threat(s) and reason for the family's involvement with child welfare services.
Observe the social worker’s ability to:
  o Partner with tribal connections and family teams
  o Identify and focus on shared goals
  o Promote consensus building
  o Facilitate dialogue which considers alternative solutions
Observe the social worker’s ability to:
Identify a safety network with the family
Develop SMART objectives to meet the case plan goals and address underlying needs
Manage conflict which may arise

Social Worker Responsibility:
- Partner with family to identify safety/support network
- Engage the family members (child, youth, parent/caregiver, tribe, safety network) in a conversation about why the Department is involved, including development of a danger statement if appropriate.
- Utilize the Case Plan Field Tool to provide a structure for asking strength based solution focused questions
- Encourages the family to describe their strength and needs
- Identify the safety goal
  - What would it look like when all of the safety threats/concerns have been addressed?
  - How will the team measure the family’s progress in demonstrating acts of protection over time?
- Check with the safety network about their willingness/confidence/capacity to be involved in the safety planning
- During the facilitated meeting continually check in to ensure there is consensus and understanding about the plan
- Utilize strategies to defuse conflict if/when it arises
- Assist family in prioritizing services and SMART objectives to effectively address the underlying needs
- Ensure the voice and choice of the child, parent/caregiver, family and tribe
- Allow time for questions the family/safety network may have
- Set up a follow up meeting

After the practice opportunity

Field Advisor Responsibility:
- Discuss the meeting with the social worker. Some things to identify as part of the reflection on the practice include:
  - Was the safety network identified in partnership with the family? Who has agreed to be part of the safety network?
  - What are some of the engagement and assessment strategies used during the meeting?
    - Have social worker self-evaluate what worked/what needed improvement and why
  - What SMART objective and goals were developed?
  - Does the plan meet the family’s underlying needs?
- Review safety goals and case plan objectives with the social worker.
- Discuss which SDM tools were completed and how this information was shared with the family and their safety network.
- Provide feedback about what went well and suggestions to enhance practice.
- Discuss and review the case plan which was developed CWS/CMS
Discuss and provide feedback about the contact narrative
  - Language/terminology used
  - Accuracy

Complete the Field Advisor **Case Planning and Service Delivery** survey:
  - [https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_5dxKldW9UfZ9bdb](https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_5dxKldW9UfZ9bdb)

**Social Worker Responsibility:**
- Create the case plan in CWS/CMS.
- Enter the contact narrative in CWS/CMS regarding the case planning meeting.
- Bring the following documents to review with the field advisor:
  - Completed case plan
  - CWS/CMS contact narrative
  - Completed SDM tools
- Reflect on some of the skills you used during the case planning meeting:
  - Provide an example of a strength-based question(s) used in family meeting.
  - Provide an example of a solution-focused question used in the family meeting.
  - Provide an example of strategies and language used to help the family be engaged in the case plan development.
- Reflect on the meeting and think about:
  - What worked well?
  - What are some possible upgrades?
  - Are there any next steps to support your learning and professional development?
- Review completed case plan with children (if not present), parents, safety network, and tribe. Ensure that the parent/caregiver(s) sign the completed case plan.
- Complete the Social Worker **Case Planning and Service Delivery** survey:
  - [https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_40b3VOVI3uLldHv](https://berkeleyssw.ca1.qualtrics.com/jfe/form/SV_40b3VOVI3uLldHv)
MONITORING AND ADAPTING FIELD ACTIVITY

Block 5 – Monitoring and Adopting Block

| Field | Collaborative Assessment, Planning, and Support: Case Plan Update (3 hours) |

Collaborative Assessment, Planning, and Support: Case Plan Update

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

**Learning Objectives**

**Field Activity: Collaborative Assessment, Planning, and Support: Case Plan Update (3 hours)**

**Knowledge**

K1. The trainee will be able to identify the benefits to children, youth, families, tribes, and the child welfare agency of participating in a team-based planning process.

K2. The trainee will be able to identify the purpose of utilizing the appropriate SDM tools when updating the case plan to assess the parent/caregiver’s ability to meet case plan objectives.

K3. The trainee will be able to identify engagement strategies for monitoring/adapting a case plan in full partnership and collaboration with the family, safety network, and tribe.

K4. The trainee will be able to identify the behaviors of the parent/caregiver which show their protective capacity and how they have demonstrated acts of protection over time.

**Skill**

S1. The trainee will use behaviorally specific language when discussing case plan progress with the family and the safety network.

S2. The trainee will address key issues, (as applicable) during the case plan update meeting, using understandable language. Key issues include, but are not limited to: behavior change, visitation, placement stability, permanency (including concurrent planning), culturally responsive services, ICWA active efforts, well-being (medical, dental, educational, behavioral, and mental health needs), child and family team meetings, advocacy, use of safety plan (including any new safety threats), impact of trauma, life skills development for ILP eligible youth, and Special Immigration Juvenile Status (SIJS).

S3. The trainee will review the previous case plan with the safety network and make any adjustments as determined by the team. This may include updates related to:

- The Safety Network
- The Safety Goal
- Permanency Goal
• Services

S4. The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with the child, youth, parent/caregiver, family and tribe using language that is understandable to all.

S5. The trainee will enter S.M.A.R.T. case plan objectives for the CWS/CMS case plan.

S6. The trainee will enter the case notes narrative for the meeting in CWS/CMS

OR

S7. In a team setting, the trainee will participate in a case plan observation activity utilizing an observation tool and case plan worksheet to demonstrate critical thinking skills.

Values

V1. The trainee will appreciate 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 seek to be transparent when discussing risk, safety, and the role of the court with the family and their team.

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

Activity

Practice Area: Monitoring and Adapting

California Core Practice Model Practice Behaviors: 1 (a-f), 2 (a-b), 3 (a-c), 4 (a-g), 5 (a-d), 6 (a-c), 7 (a-f), 8 (a-e), 9 (a-f), 11, 12 (a-h)

Estimated Time Required: 3 hours

Related eLearning/classroom:

- Monitoring and Adapting: Supporting Safety, Permanency, and Well-being
- Placement
- Managing the Plan: Supporting Safety, Permanency, and Well-being

Description of Activity:
The social worker will participate in or observe a case planning meeting with a family to develop an updated case plan.

This activity is designed for case plan update 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 a team meeting for the purpose of bringing the safety network together to update the case plan. Some of the case planning and service delivery activities that may have occurred prior to the case plan update meeting with the safety network include, but are not limited to:

- 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 monitor the family’s progress towards meeting the safety goal
• Referrals to culturally responsive services and community-based supports
• Gathering reports and information from service providers and the members of the safety network
• Assessing with the family and other members of the safety network the specific actions and strategies that have been used to provide safety and support the well-being of the family since the case plan development or last case plan update

Before the practice opportunity

Field Advisor Responsibility:

☐ Work with the trainee to identify a case for which a team meeting to discuss a case plan update 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:
  o Purpose of the team meeting
  o What role will the social worker be playing in the meeting (facilitator or participant)?
  o 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?
  o 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?
  o How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meetings.
  o Discuss documents, materials, or other information that may be helpful for the trainee to review prior to the meeting to help better understand the family’s history and current circumstances. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.

  ▪ Review the previous case plan and progress towards:
    • Behavior changes
    • Addressing underlying needs & trauma
    • Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?

- Relative or NREFM placement (if applicable)
- Reports and information from service providers and the members of the safety network regarding the family and child’s progress
- Current minute orders

**Social Worker Responsibility:**

- In partnership with the field advisor identify a case for which a team meeting to discuss an initial case plan is needed or scheduled.

- Once the family has given permission for trainee to observe the meeting, participate in a brief meeting with the field advisor and assigned social worker to become more familiar with the case to be observed. The field advisor will facilitate the discussion. The field advisor may ask questions about:
  - Purpose of the team meeting
  - What role will the social worker be playing in the meeting (facilitator or participant)?
  - Discuss with the social worker who the family has identified as their circle of support and/or safety network. Who is anticipated to participate in the team meeting?
  - Discuss with the social worker how the family’s culture and trauma history may have an impact on the meeting. How has the social worker explored this with the family?
  - How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meeting.
  - Review documents, materials, or other information recommended by the assigned social worker in preparation for the meeting. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.
    - Review the previous case plan and progress towards:
      - Behavior changes
      - Addressing underlying needs & trauma
      - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
      - Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
      - Relative or NREFM placement (if applicable)
      - Reports and information from service providers and the members of the safety network regarding the family and child’s progress
      - Current minute orders

- 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:
a. SMART Objectives
b. Case Plan Field Tool

During the practice opportunity

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

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

After the practice opportunity

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

Social Worker Responsibility:
- Discuss the completed observation worksheet with the field advisor.
- Reflect on what worked well for the family during the meeting. Discuss strategies that the social worker used to engage the family in the discussion about case planning.
- Reflect on one thing that you would like to try when you facilitate or participate in a team meeting related to case planning in the future?
Collaborative Assessment, Planning, and Support: Case Plan Update

OBSERVATION WORKSHEET

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

<table>
<thead>
<tr>
<th>Question</th>
<th>Trainee Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>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?</td>
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<tr>
<td>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?</td>
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<tr>
<td>Describe how SDM tools (Safety Assessment, Risk Assessment, Family Strengths and Needs Assessment) were talked about in the meeting.</td>
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<tr>
<td>Describe how the family’s circle of support/safety network was engaged in the case planning process.</td>
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<tr>
<td>Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the case planning process.</td>
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<tr>
<td>What changes were made to the case plan goal(s) and objectives? How do the changes to the case plan relate to the MSLC and the reason for initial removal?</td>
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</tr>
<tr>
<td>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? (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.)</td>
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<tr>
<td>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?</td>
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</tr>
<tr>
<td>Overall, do you think the meeting goal was met? Why or why not?</td>
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</tr>
</tbody>
</table>
**Active Case Activity Option**
Select an active case for which a team meeting to discuss a case plan update is needed or scheduled.  
(Note: If the trainee is assigned 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, the trainee MUST choose this option.)

**Learning Objectives**

<table>
<thead>
<tr>
<th>Field Activity: Collaborative Assessment, Planning, and Support: Case Plan Update (3 hours)</th>
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<td><strong>Knowledge</strong></td>
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<td>K2. The trainee will be able to identify the purpose of utilizing the appropriate SDM tools when updating the case plan to assess the parent/caregiver’s ability to meet case plan objectives.</td>
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<td>K3. The trainee will be able to identify engagement strategies for monitoring/adapting a case plan in full partnership and collaboration with the family, safety network, and tribe.</td>
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<td><strong>Skill</strong></td>
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<td>S2. The trainee will address key issues, (as applicable) during the case plan update meeting, using understandable language. Key issues include, but are not limited to: behavior change, visitation, placement stability, permanency (including concurrent planning), culturally responsive services, ICWA active efforts, well-being (medical, dental, educational, behavioral, and mental health needs), child and family team meetings, advocacy, use of safety plan (including any new safety threats), impact of trauma, life skills development for ILP eligible youth, and Special Immigration Juvenile Status (SIJS).</td>
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<td>S3. The trainee will review the previous case plan with the safety network and make any adjustments as determined by the team. This may include updates related to:</td>
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<td>• The Safety Goal</td>
<td></td>
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<tr>
<td>• Permanency Goal</td>
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<tr>
<td>• Services</td>
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<tr>
<td>S4. The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with the child, youth, parent/caregiver, family and tribe using language that is understandable to all.</td>
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<td>S5. The trainee will enter S.M.A.R.T. case plan objectives for the CWS/CMS case plan.</td>
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<td>S6. The trainee will enter the case notes narrative for the meeting in CWS/CMS</td>
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<tr>
<td><strong>OR</strong></td>
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<tr>
<td>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.</td>
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<tr>
<td><strong>Values</strong></td>
<td></td>
</tr>
<tr>
<td>V1. The trainee will appreciate the role of the team in developing case plan that meets the needs for safety, permanency, and well being of the child.</td>
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V2. The trainee will seek to be transparent when discussing risk, safety, and the role of the court with the family and their team.

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

Activity

Practice Area: Monitoring and Adapting

California Core Practice Model Practice Behaviors: 1 (a-f), 2 (a-b), 3 (a-c), 4 (a-g), 5 (a-d), 6 (a-c), 7 (a-f), 8 (a-e), 9 (a-f), 11, 12 (a-h)

Estimated Time Required: 3 hours

Related eLearning/classroom:

- Monitoring and Adapting: Supporting Safety, Permanency, and Well-being
- Placement
- Managing the Plan: Supporting Safety, Permanency, and Well-being

Description of Activity:
The social worker will participate in or observe a case planning meeting with a family to develop an updated case plan.

This activity is designed for case plan update 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 a team meeting for the purpose of bringing the safety network together to update the case plan. Some of the case planning and service delivery activities that may have occurred prior to the case plan update meeting with the safety network include, but are not limited to:

- 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 monitor the family’s progress towards meeting the safety goal
- Referrals to culturally responsive services and community-based supports
- Gathering reports and information from service providers and the members of the safety network
- Assessing with the family and other members of the safety network the specific actions and strategies that have been used to provide safety and support the well-being of the family since the case plan development or last case plan update

Before the practice opportunity

Field Advisor Responsibility:
Review Field Advisor Guide
Review Learning Objectives
Review the SDM Safety Assessment, Risk Assessment and FSNA tools to focus the case plan development meeting

Meet with the social worker to:
- Create agreements, discuss learning style, and establish feedback loop
- Explore comfort level with SDM tools
- Review SMART Objective process
- Identify a case for the activity

Discuss with the social worker what may be needed prior to the meeting to feel prepared? Utilizing a scaling question, have the social worker scale their comfort level and experience with developing a case plan with a family. Some follow up questions may include:
- What has gotten you to a ___? How have you prepared to facilitate a case plan update meeting with the family?
- What would it look like to move up one step on the scale? What would the social worker be able to demonstrate that shows they are prepared to develop a case plan update with the family?

Discuss the family’s progress toward meeting the safety goal. Some considerations for discussion include, but are not limited to:
- Review applicable SDM Tools
- Review the previous case plan and progress towards:
  - Behavior changes
  - Addressing underlying needs & trauma
  - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
  - Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
  - Relative or NREFM placement (if applicable)
- Legal timeframes/statutory timelines & recommendations
- Update safety networks & their commitment to family success during and after CWS involvement
- Reports and information from service providers and the members of the safety network regarding the family and child’s progress
- Continued self-assessment of social worker bias and identification/implementation of strategies to address bias

Review the prior minute order with the social worker

Social Worker Responsibility:
- Ask any questions or clarify expectations for the activity.
- Review:
  a. SMART Objectives
  b. Case Plan Field Tool
- Reflect on personal bias that may impact the development of the case plan
- Discuss where the meeting will take place: date/time/location (preferably the family’s home)
☐ Have a conversation with the family and their identified safety network about:
  a. Who will attend?
  b. What can they expect?
  c. What are any cultural considerations that the team should discuss or be aware of?
☐ Discuss the family’s progress toward meeting the safety goal. Some considerations for discussion include, but are not limited to:
  a. Review applicable SDM Tools
  b. Review the previous case plan and progress towards:
     ▪ Behavior changes
     ▪ Addressing underlying needs & trauma
     ▪ Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified
     ▪ Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
     ▪ Relative or NREFM placement (if applicable)
  c. Legal timeframes/statutory timelines & recommendations
  d. Update safety networks & their commitment to family success during and after CWS involvement
  e. Reports and information from service providers and the members of the safety network regarding the family and child’s progress
  f. Continued self-assessment of social worker bias and identification/implementation of strategies to address bias
☐ Review the prior minute order with the field advisor

**During the practice opportunity**

**Field Advisor Responsibility:**
☐ Observe the social worker’s use of engagement skills, solution focused questions, appreciative inquiry, and strength-based language
☐ Help to ensure that the language used is family friendly, understandable and culturally sensitive. Help to reframe statements or clarify if needed.
☐ Ensure the updated case plan objectives and services are related to the safety threat(s) and reason for the family’s involvement with child welfare services, with a focus on MSLC
☐ Observe the social worker’s ability to:
  o Engage the family team around the initial Case Plan in the following areas:
    ▪ What were the worries?
    ▪ What worked well?
    ▪ What are the next steps?
    ▪ Engage the family team in difficult conversations around any/all differences in the family and agency point of view on progress
  o Promote consensus building
  o Facilitate dialogue which considers alternative solutions
  o Explain current legal and/or agency status and timelines
  o Elicit and honor the family’s voice and choice
  o Work with the family team to create Case Plan adjustments which could include:
- S.M.A.R.T objectives
- Safety Network members and their roles including supporting long term safety
- Services
  - Manage conflict which may arise
  - Mitigate personal bias or other concerns previously identified by the trainee or help to ensure those things do not impact the family

**Social Worker Responsibility:**
- Partner with family to identify safety/support network
- Engage the family members (child, youth, parent/caregiver, tribe, safety network) in a conversation about the family’s progress toward meeting the safety goal.
  - What’s working well?
  - What are they worried about?
  - Are there any barriers to meeting the case plan goals?
- Review the family’s progress toward case plan goals, which would include:
  - Behavior change for parents
  - Behavior change for child
  - Child safety
  - SDM tools and risk re-assessment
  - Visitation
  - Permanency or concurrent plan
  - Safety network
    - Are they following through?
    - Any new members or did a previous member leave?
    - Are network members’ commitments long-term or temporary?
  - Progress and challenges with services, highlighting areas of strength and growth for the family
    - What steps have been taken by the parents to demonstrate acts of safety?
  - Anything that should be added or removed from the case plan?
- Check with the safety network about their willingness/confidence/capacity to continue being involved in the safety planning
- During the facilitated meeting continually check in to ensure there is consensus and understanding about the plan.
- Set new case plan goals with the team based on MSLC and the safety goal for the family.
- Discuss the current legal and/or agency status. Review the minute order with the family.
- Utilize strategies to defuse conflict if/when it arises
- Ensure the voice and choice of the child, parent/caregiver, family and tribe
- Allow time for questions the family/safety network may have
- Set up a follow up meeting

**After the practice opportunity**

**Field Advisor Responsibility:**
- Discuss the meeting with the social worker. Some things to identify as part of the reflection on the practice include:
  - What was the process of identifying new safety network members or making updates to the safety network?
What are some of the engagement and assessment strategies used during the meeting?
- Have social worker self-evaluate what worked/what needed improvement and why
- Do the case plan updates reflect the current underlying needs and long-term goals of the family?

- Discuss which SDM tools were completed and how this information was shared with the family and their safety network.
- Provide feedback about what went well and suggestions to enhance practice.
- Discuss and review the updated case plan which was developed CWS/CMS
- Discuss and provide feedback about the contact narrative
  - Language/terminology used
  - Accuracy

- Identify next steps: new service referrals, visitation schedule, additional contacts regarding safety network, reports from service providers and service providers. Check in regarding when next court report is due and what in needed. Close the feedback loop to ensure all team members are aware of the updated case plan.

Social Worker Responsibility:
- Create the updated case plan in CWS/CMS.
- Enter the contact narrative in CWS/CMS regarding the case planning meeting.
- Bring the following documents to review with the field advisor:
  - Completed updated case plan
  - CWS/CMS contact narrative
  - Completed SDM tools
- Reflect on some of the skills you used during the case planning meeting:
  - Provide an example of a strength-based question(s) used in family meeting.
  - Provide an example of a solution-focused question used in the family meeting.
  - Provide an example of strategies and language used to help the family be engaged in the case plan update.
- Reflect on the meeting and think about:
  - What worked well?
  - What are some possible upgrades?
  - Are there any next steps to support your learning and professional development?
- Review completed case plan with children (if not present), parents, safety network, and tribe. Ensure that the parent/caregiver(s) sign the completed case plan.
- In a follow up meeting with family obtain signatures on the case plan.
- Follow up on any next steps identified with the field advisor.
TRANSITION BLOCK FIELD ACTIVITY

<table>
<thead>
<tr>
<th>Block 6 – Transition Block Field Block</th>
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</thead>
<tbody>
<tr>
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Collaborative Assessment, Planning, and Support: Case Plan Update

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

**Learning Objectives**

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<td>K2. The trainee will be able to identify the purpose of utilizing the appropriate SDM tools when updating the case plan or closing the case.</td>
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<td>K3. The trainee will be able to identify engagement strategies for monitoring/adapting a case plan and planning for a transition in full partnership and collaboration with the family.</td>
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<td>K4. The trainee will be able to identify the benefit of planning with a family for long-term safety.</td>
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| Skill |                                                                                       |
| S1. The trainee will use behaviorally specific language when discussing case plan progress with the family and the safety network. |
| S2. The trainee will address key issues, (as applicable) during the case plan update meeting, using understandable language. Key issues include, but are not limited to: behavior change, visitation, placement stability, permanency (including concurrent planning), culturally responsive services, ICWA active efforts, well-being (medical, dental, educational, behavioral, and mental health needs), child and family team meetings, advocacy, use of safety plan (including any new safety threats), impact of trauma, life skills development for ILP eligible youth, and Special Immigration Juvenile Status (SIJS). |
| S3. The trainee will review the previous case plan with the safety network and make any adjustments as determined by the team. This may include updates related to: |
  * The Safety Network |
  * The Safety Goal |
  * Permanency Goal |
  * Services |
S4. The trainee will develop S.M.A.R.T. case plan goals and objectives in partnership with the child, youth, parent/caregiver, family and tribe using language that is understandable to all.

S5. The trainee will enter S.M.A.R.T. case plan objectives for the CWS/CMS case plan.

S6. The trainee will enter the case notes narrative for the meeting in CWS/CMS OR

S7. In a team setting, the trainee will participate in a case plan observation activity utilizing an observation tool and case plan worksheet to demonstrate critical thinking skills.

Values

V1. The trainee will seek to be transparent when discussing risk, safety, and the role of the court with the family and their team.

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

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

Activity

Practice Area: Transition

California Core Practice Model Practice Behaviors: 1 (a-f), 2 (a-b), 3 (a-c), 4 (a-g), 5 (a-d), 6 (a-c), 7 (a-f), 8 (a-e), 9 (a-f), 11, 12 (a-h), 13 (a-b)

Estimated Time Required: 3 hours

Related eLearning/classroom:

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

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

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

- Working with the youth, family, and tribe to identify safety network members
• Meeting with individual members of the safety network to gather their input regarding the youth and family’s strengths and what is needed to provide ongoing safety for the child or youth
• Working with the family and other members of the safety network to monitor the family’s progress towards meeting the safety goal
• Referrals to culturally responsive services and community-based supports
• Gathering reports and information from service providers and the members of the safety network
• Assessing with the youth, family and other members of the safety network the specific actions and strategies that have been used to provide safety and support the well-being of the youth and family since the case plan development or last case plan update

**Before the practice opportunity**

**Field Advisor Responsibility:**

- Work with the trainee to identify a case for which a team meeting to discuss a case plan update related to a transition is needed or scheduled. The field advisor may need to contact other unit supervisors or social workers to identify a case.
- Once a case has been identified for this activity, arrange a brief meeting with the assigned social worker to review the purpose of the trainee’s observation.
- Work with the assigned social worker to obtain permission from the family for the trainee to observe the meeting.
- Once the family has given permission for trainee to observe the meeting, work with the assigned social worker and trainee to set up a brief meeting to discuss important background information. The field advisor will help guide the discussion with both the trainee and assigned social worker present. Some information to discuss includes:
  - Purpose of the team meeting
  - What role will the social worker be playing in the meeting (facilitator or participant)?
  - Discuss with the social worker who the family has identified as their circle of support and/or safety network. Who is anticipated to participate in the team meeting?
  - Discuss with the social worker how the family’s culture and trauma history may have an impact on the meeting. How has the social worker explored this with the family?
  - How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meetings.
  - Discuss documents, materials, or other information that may be helpful for the trainee to review prior to the meeting to help better understand the family’s history and current circumstances. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.
    - Review the previous case plan and progress towards:
      - Behavior changes (if applicable)
      - Addressing underlying needs & trauma
      - Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified (if applicable)
• Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
• Relative or NREFM placement (if applicable)
• Reports and information from service providers and the members of the safety network regarding the family and child’s progress
• Current minute orders

Social Worker Responsibility:

☐ In partnership with the field advisor identify a case for which a team meeting to discuss an initial case plan is needed or scheduled.

☐ Once the family has given permission for trainee to observe the meeting, participate in a brief meeting with the field advisor and assigned social worker to become more familiar with the case to be observed. The field advisor will facilitate the discussion. The field advisor may ask questions about:
  ○ Purpose of the team meeting
  ○ What role will the social worker be playing in the meeting (facilitator or participant)?
  ○ Discuss with the social worker who the family has identified as their circle of support and/or safety network. Who is anticipated to participate in the team meeting?
  ○ Discuss with the social worker how the family’s culture and trauma history may have an impact on the meeting. How has the social worker explored this with the family?
  ○ How have participants been prepared for the meeting? Encourage the assigned social worker to describe their process for preparing families for team meeting.
  ○ Review documents, materials, or other information recommended by the assigned social worker in preparation for the meeting. This should include any safety and risk assessment tools and county policies and procedures regarding case planning.
    ▪ Review the previous case plan and progress towards:
      • Behavior changes (if applicable)
      • Addressing underlying needs & trauma
      • Active efforts-ICWA; continued ICWA inquiry especially as additional family & safety network is identified (if applicable)
      • Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does rise to the level of concerted efforts?
      • Relative or NREFM placement (if applicable)
      • Reports and information from service providers and the members of the safety network regarding the family and child’s progress
      • Current minute orders

☐ 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:
a. SMART Objectives
b. Case Plan Field Tool

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<tr>
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**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 🐝.*

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

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

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<td>Were any SDM tools used in the meeting? If yes, describe how SDM tools were discussed with the child/youth/family.</td>
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<td>Describe how the family’s circle of support/safety network was engaged in the transition planning for the child/youth/family.</td>
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<td>Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the transition planning process.</td>
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<td>How will the updated case plan reflect the child/youth/family’s needs in the future? What were some of the critical issues discussed related to transition?</td>
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<td>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? (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.)</td>
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<td>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?</td>
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<td>Overall, do you think the meeting goal was met? Why or why not?</td>
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Active Case Activity Option
Select an active case for which a team meeting to discuss case planning and service delivery is needed or scheduled. (Note: If the trainee is assigned 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, the trainee MUST choose this option.)

Learning Objectives

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

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

**Activity**

**Practice Area:** Transition

**California Core Practice Model Practice Behaviors:** 1 (a-f), 2 (a-b), 3 (a-c), 4 (a-g), 5 (a-d), 6 (a-c), 7 (a-f), 8 (a-e), 9 (a-f), 11, 12 (a-h), 13 (a-b)

**Estimated Time Required:** 3 hours

**Related eLearning/classroom:**
- Case Closure and After Care Plans
- After 18
- Transition Practice

**Description of Activity:**
The social worker will participate in or observe a case planning meeting with a family to develop a transition case plan.

This activity is designed for case plan update development when a child or family is experiencing a transition within the child welfare system or to permanency. Examples of team-based case planning opportunities that can be utilized for this field activity include (but are not limited to): safety planning meetings, mappings, TILP/TILPC, CFTs, or other case planning types of meetings. The process of case planning does not happen during one meeting, rather, it is a series of activities that engage the child, youth, parent, family, tribe, and any other member of the safety network in identifying a safety goal.

The family’s strengths and needs inform what actions are needed to provide safety and identify which services will help reduce risk and provide for well-being of the child(ren). With the understanding that there are many activities that are part of the case planning process, this field activity will focus on a team meeting for the purpose of bringing the safety network together to update the case plan. Some of the case planning and service delivery activities that may have occurred prior to the transition case plan update meeting with the safety network include, but are not limited to:

- Working with the youth, family, and tribe to identify safety network members
- Meeting with individual members of the safety network to gather their input regarding the youth and family’s strengths and what is needed to provide ongoing safety for the child or youth
- Working with the family and other members of the safety network to monitor the family’s progress towards meeting the safety goal
- Referrals to culturally responsive services and community-based supports
- Gathering reports and information from service providers and the members of the safety network
- Assessing with the youth, family and other members of the safety network the specific actions and strategies that have been used to provide safety and support the well-being of the youth and family since the case plan development or last case plan update

**Before the practice opportunity**
Field Advisor Responsibility:

- Review Field Advisor Guide
- Review Learning Objectives
- Review the SDM Safety Assessment, Risk Assessment and FSNA tools to focus the case plan development meeting
- Meet with the social worker to:
  - Create agreements, discuss learning style, and establish feedback loop
  - Explore comfort level with SDM tools
  - Review SMART Objective process
  - Identify a case for the activity
- Discuss with the social worker what may be needed prior to the meeting to feel prepared? Utilizing a scaling question, have the social worker scale their comfort level and experience with developing a case plan with a family. Some follow up questions may include:
  - What has gotten you to a ___? How have you prepared to facilitate a case plan update meeting with the family?
  - What would it look like to move up one step on the scale? What would the social worker be able to demonstrate that shows they are prepared to develop a case plan update with the family?
- Discuss the family’s progress toward meeting the safety or permanency goal. Some considerations for discussion include, but are not limited to:
  - Review applicable SDM Tools
  - Review the previous case plan and progress towards:
    - Behavior changes (if applicable)
    - Addressing underlying needs & trauma
    - Active efforts-ICWA; continued ICWA inquiry especially as additional family and safety network is identified (if applicable)
    - Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does it rise to the level of concerted efforts?
    - Relative or NREFM placement (if applicable)
  - Legal timeframes/statutory timelines and recommendations
  - Update safety networks and their commitment to child/youth/family success during and after CWS involvement
  - Reports and information from service providers and the members of the safety network regarding the child/youth/family’s progress
  - Continued self-assessment of social worker bias and identification/implementation of strategies to address bias
- When thinking specifically about transition case planning, discuss the following (as applicable)
  - What supports are needed for the youth and/or family?
    - Reunification
    - Permanent Plan (Guardianship or Adoption)
    - Emancipation or AB12
  - Potential role changes for the social worker and the family or youth
- Review the prior minute order with the social worker

Social Worker Responsibility:
Ask any questions or clarify expectations for the activity.

Review:
  a. SMART Objectives
  b. Case Plan Field Tool

Reflect on personal bias that may impact the development of the case plan

Discuss where the meeting will take place: date/time/location (preferably the family’s home)

Have a conversation with the family and their identified safety network about:
  a. Who will attend?
  b. What can they expect?
  c. What are any cultural considerations that the team should discuss or be aware of?

Discuss the family’s progress toward meeting the safety goal. Some considerations for discussion include, but are not limited to:
  a. Review applicable SDM Tools
  b. Review the previous case plan and progress towards:
     ▪ Behavior changes (if applicable)
     ▪ Addressing underlying needs & trauma
     ▪ Active efforts-ICWA; continued ICWA inquiry especially as additional family and safety network is identified (if applicable)
     ▪ Reasonable efforts (incarcerated parents, due diligence searches, regarding placement and moving towards permanency, family finding, efforts to reunify siblings, life skill development for ILP eligible youth) and does it rise to the level of concerted efforts?
     ▪ Relative or NREFM placement (if applicable)
  c. Legal timeframes/statutory timelines and recommendations
  d. Update safety networks & their commitment to child/youth/family success during and after CWS involvement
  e. Reports and information from service providers and the members of the safety network regarding the family and child’s progress
  f. Continued self-assessment of social worker bias and identification/implementation of strategies to address bias

When thinking specifically about transition case planning, discuss the following (as applicable)
  a. What supports are needed for the youth and/or family?
     ▪ Reunification
     ▪ Permanent Plan (Guardianship or Adoption)
     ▪ Emancipation or AB12
  b. Potential role changes for the social worker and the family or youth

Review the prior minute order with the field advisor

During the practice opportunity

Field Advisor Responsibility:
  □ Observe the social worker’s use of engagement skills, solution focused questions, appreciative inquiry, and strength-based language
Help to ensure that the language used is family friendly, understandable and culturally sensitive. Help to reframe statements or clarify if needed.

Ensure the updated case plan objectives and services are related to needs of the family or youth during the transition. This may include after-care planning or logistic planning for the transition.

Observe the social worker’s ability to:
  - Engage the family team around the Updated Case Plan in the following areas:
    - What are/were the worries?
    - What worked well?
    - What are the next steps?
    - Engage the family team in difficult conversations around any/all differences in the family and agency point of view on progress and next steps
  - Promote consensus building
  - Facilitate dialogue which considers alternative solutions
  - Explain current legal and/or agency status and timelines (if applicable)
  - Elicit and honor the youth and family’s voice and choice
  - Work with the family team to create Case Plan adjustments which could include:
    - S.M.A.R.T objectives
    - Safety Network members and their roles including supporting long term safety
    - Services or community resources
  - Manage conflict which may arise
  - Mitigate personal bias or other concerns previously identified by the trainee or help to ensure those things do not impact the family

Social Worker Responsibility:
  - Partner with family to identify safety/support network
  - Engage the family members (child, youth, parent/caregiver, tribe, safety network) in a conversation about the youth or family’s progress toward meeting the case plan goal.
    - What’s working well?
    - What are they worried about?
    - Are there any barriers to meeting the case plan goals?
  - Review the family’s progress toward case plan goals, which would include:
    - Behavior change for parents (if applicable)
    - Behavior change for child/youth
    - Child/youth safety
    - SDM tools and risk re-assessment (if applicable)
    - Visitation (if applicable)
    - Permanency or concurrent plan
    - Safety network
      - Are they following through?
      - Any new members or did a previous member leave?
      - Are network members’ commitments long-term or temporary?
    - Progress and challenges with services, highlighting areas of strength and growth for the youth or family
      - What steps have been taken by the parents to demonstrate acts of safety? (if applicable)
    - Anything that should be added or removed from the case plan?
  - Check with the safety network about their willingness/confidence/capacity to continue being involved in the safety or permanency planning
During the facilitated meeting continually check in to ensure there is consensus and understanding about the plan.

Set new case plan goals with the team based on MSLC and the safety or permanency goal for the youth or family.

Discuss the current legal and/or agency status. Review the minute order with the youth or family.

Utilize strategies to defuse conflict if/when it arises

Ensure the voice and choice of the child, parent/caregiver, family and tribe

Allow time for questions the youth/family/safety network may have

Set up a follow up meeting (if applicable)

After the practice opportunity

Field Advisor Responsibility:

- Discuss the meeting with the social worker. Some things to identify as part of the reflection on the practice include:
  - What was the process of identifying new safety network members or making updates to the safety network?
  - What are some of the engagement and assessment strategies used during the meeting?
    - Have social worker self-evaluate what worked/what needed improvement and why
  - Do the case plan updates reflect the needs of the youth or family as it relates to the transition? Has permanency been addressed in the case plan?
- Discuss which SDM tools were completed and how this information was shared with the family and their safety network.
- Provide feedback about what went well and suggestions to enhance practice.
- Discuss and review the updated case plan which was developed CWS/CMS
- Discuss and provide feedback about the contact narrative
  - Language/terminology used
  - Accuracy
- Identify next steps: new service referrals, visitation schedule, additional contacts regarding safety network, reports from service providers and service providers, aftercare services, etc. (if applicable).
- Check in regarding when next court report is due and what in needed.

Social Worker Responsibility:

- Create the updated case plan in CWS/CMS.
- Enter the contact narrative in CWS/CMS regarding the case planning meeting.
- Bring the following documents to review with the field advisor:
  - Completed updated case plan
  - CWS/CMS contact narrative
  - Completed SDM tools
- Reflect on some of the skills you used during the case planning meeting:
  - Provide an example of a strength-based question(s) used in family meeting.
  - Provide an example of a solution-focused question used in the family meeting.
  - Provide an example of strategies and language used to help the youth or family be engaged in the transition case plan update.
- Reflect on the meeting and think about:
- What worked well?
- What are some possible upgrades?
- Are there any next steps to support your learning and professional development?

☐ Reflect on your feelings about the transition. This may be a time to celebrate a family reunifying or a youth transitioning to emancipation or AB12. This may also be a time of mixed emotions if the transition is moving forward with a permanent plan. Think about what you learned from your work with this youth or family and how you will apply this to your work with other youth and families in the future.

☐ Review completed case plan with children (if not present), parents, safety network, and tribe. Ensure that the parent/caregiver(s) sign the completed case plan (if applicable).

☐ Follow up on any next steps identified with the field advisor.
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.

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</tr>
<tr>
<td>Describe how the family’s circle of support/safety network was engaged in the transition planning for the child/youth/family.</td>
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<tr>
<td>Describe what it looked like when the youth, parent, family, and others in the meeting appeared to be engaged in the transition planning process.</td>
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<tr>
<td>How will the updated case plan reflect the child/youth/family’s needs in the future? What were some of the critical issues discussed related to transition?</td>
<td></td>
</tr>
</tbody>
</table>
| 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?  
(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.) |               |
| 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? |               |