

## Core: Case Planning and Case Management Workbook Materials

<u>Content</u>	<u>Page</u>
<u>Competencies and Learning Objectives</u>	<u>2</u>
<u>Activity: How Do I Plan?</u>	<u>8</u>
<u>Case Plan Preparation Worksheet</u>	<u>10</u>
<u>Taking it Home (Day 1)</u>	<u>11</u>
<u>Wilson Family Initial Case Plan Worksheet</u>	<u>12</u>
<u>Two-minute Pitch</u>	<u>16</u>
<u>Wilson Family Case Plan Update Worksheet</u>	<u>17</u>
<u>Taking it Home (Day 2)</u>	<u>20</u>

# Competencies and Learning Objectives

## Relevant child welfare outcomes

### Safety 1

Children are, first and foremost, protected from abuse and neglect

### Permanency 1

Children have permanency and stability in their living situations without increasing reentry to foster care

### Permanency 2

The continuity of family relationships and connections is preserved for children

### Well-being 1

Families have enhanced capacity to provide for their children's needs

## Core competencies

The participant will understand the dynamics of engaging families in comprehensive participatory case planning which includes addressing the underlying contributing issues to maltreatment and extensive exploration of family strengths and resources in order to specifically address risk in identified areas.

The participant will develop with the family appropriate, time limited case specific goals and objectives; formulate observable, behavioral measures of these goals and objectives; and outline all parties' agreed upon roles, responsibilities and activities within required time frames to address high priority needs and problem areas identified in the family assessment.

The participant will value the importance of engaging and collaborating with the family and their resources in strength-based, culturally competent ways towards developing a comprehensive, family-specific case plan.

## Learning objectives

### Knowledge:

- K1.** The participant will recognize how to integrate effective strength-based questioning and interviewing strategies to communicate the agency's expectations to ensure children's safety, permanency and well-being while simultaneously engaging immediate and extended family members to collaborate in case planning and concurrent planning.
- K2.** The participant will be able to recognize and consider relevant laws and policies needed during the case plan process.
- K3.** The participant will be able to identify the relevant Division 31 regulations and the proper sequence of steps for the case planning process.
- K4.** The participant will know the definition of a concurrent plan.
- K5.** The participant will know the difference among case goals, objectives and services.
- K6.** The participant will be able to identify the case plan as the contract between the agency and family to guide, monitor, and evaluate the family's progress toward case plan goals.
- K7.** The participant will be able to recognize the need to work collaboratively to formulate case plan objectives that:
  - a. reflect desired behavioral changes;
  - b. acknowledge the conditions directly contributing to maltreatment in the family;
  - c. are culturally relevant for the family;
  - d. address the specific strengths and needs of children, youth, and young adults including medical and mental health services;
  - e. meet the needs of young adults in extended foster care; and
  - f. address safety, permanency and well-being.
- K8.** The participant will be able to recognize that purposeful and frequent parent-child visitation is highly correlated with successful reunification.

- K9. The participant will know factors to determine when a case should be closed and strategies to use at case closure to reduce recidivism or reopening the case.
- K10. The participant will be able to recognize that CWS/CMS is a templated tool that requires customizing for each family based on the strengths and needs of that family.

**Skills:**

- S1. Given a case scenario, the participant will be able to articulate the specific strength-based questioning and interviewing strategies and engagement skills the participant would use to identify and address the strengths, needs and cultural considerations of youth and families; and describe why these skills would be effective in developing the specific case plan.
- S2. Given a case scenario, the participant will be able to write an individualized case plan (or complete a child welfare services case plan and case plan family assessment document in CWS/CMS) that:
  - a. contains language that can be easily understood by families
  - b. accurately reflects families' strengths and needs
  - c. includes case plan objectives that are S.M.A.R.T.
  - d. directly addresses factors contributing to the maltreatment
  - e. considers relevant laws and policies.
- S3. Given a case scenario, the participant will be able to articulate and present the reassessment process, which includes assessing outcomes of services and making needed adjustments in case plan goals, objectives, concurrent planning and services with the youth and family.
- S4. Given a case scenario, the participant will be able to identify:
  - a. when case plan objectives have been successfully achieved
  - b. when MSLC is achieved and maintained
  - c. when the case can be closed
  - d. the components of an aftercare plan.

**Values:**

- V1.** The participant will value the importance of engaging and empowering family members in case plan development to maximize their investment and motivation to work toward change.
- V2.** The participant will understand the importance of an empathetic and non-judgmental approach when working with families.
- V3.** The participant will value prioritizing family needs and case plan objectives.
- V4.** The participant will value the importance of engaging families to formulate culturally relevant case plans and to identify culturally relevant service providers.
- V5.** The participant will value engaging in ongoing concurrent planning throughout the life of the case.
- V6.** The participant will value the significance of making reasonable efforts to support families in meeting case plan goals.

**Related Title IV-E MSW Curriculum Competencies**

**CF 4.e.** Demonstrate capacity to learn from and consult/collaborate with others and to engage constituents/consumers within the helping process.

**CF 5.c.** Develop case planning strategies to address discrimination, barriers, gaps, and fragmentation that impede client access, functioning, and optimum use of resources and opportunities.

**CP 8.1.** Demonstrate through policy practice interventions the knowledge of social work values, child welfare relevant policies (including those specific to cultural groups), and assessment of service effectiveness.

**CF 10(a).a.** Demonstrate the knowledge base and affective readiness to intervene constructively with individuals and groups.

**CA 10(a).1.** Demonstrate the ability to develop relationships and manage power differentials in routine and challenging client and partner situations, in a manner that reflects core social work values in child welfare practice.

**CP 10(a).1.** Skillfully and respectfully establish working relationships with clients and community partners in accord with social work values, and utilize those relationships in forging goals and positive outcomes.

**CF 10(a).b.** Demonstrate the capacity to exercise empathy and use of self in engagement and service delivery

**CF 10(a).c.** Demonstrate the ability to work with individuals, families, and groups to identify and work towards accomplishment of shared goals.

**CF 10(b).a.** Demonstrate ability to effectively engage with diverse individuals to gather, analyze, and interpret consumer/client information in a coherent, objective manner.

**CA 10(b).1.** Consistently gather qualitative and quantitative data from a variety of sources, form coherent meaning from the data, and use the resulting information to make recommendations and to plan interventions that meet standards for child welfare social work practice.

**CP 10(b).1.** Create service plans that demonstrate data collection and assessment methods reflecting goal mutuality and respect for clients from diverse backgrounds

**CF 10(b).c.** Demonstrate ability to involve individuals, family members, and community service providers to develop coordinated intervention plans.

**CF 10(b).d.** Demonstrate ability to critically determine the most appropriate intervention strategies to implement a plan.

**CF 10(c).a.** Demonstrate beginning ability to initiate efforts consistent with service and organizational goals.

**CA 10(c).1.** Comfortably move among the roles of a social worker in child welfare and intervene effectively in those roles, including enhancing client strengths, acting as a client advocate, and skillfully handling transitions and terminations.

**CP 10(c).1.** Shape child welfare interventions that demonstrate effective balance of multiple social worker roles and phases of service that recognize client strengths and self- determination.

**CF 10(c).c.** Demonstrate capacity to identify and prioritize challenges and to foster solutions that call on clients'/consumers' existing strengths.

# Activity: How Do I Plan?

**For each scenario, circle the answers (more than one is OK) that come closest to how you have responded or would probably respond in the situation. If none of them fits, write what does.**

1. Your grandparents (or parents) will soon have a 50<sup>th</sup> wedding anniversary. You:
  - a. Let everyone know that you can take the lead to plan the party. You make a two-column list: “must have” and “maybe”. You make three rows: “activities”, “food”, and “decorations”. You go on [www.anniversaries.com](http://www.anniversaries.com) and fill in all of the cells on your chart with ideas.
  - b. Talk to lots of people (relatives, friends, other skilled party planners), take in all of their opinions, and sort out what seems right for this party.
  - c. Leaf through some family photo albums while you listen to music that your grandparents (or parents) love and wait for some inspiring ideas to come to you.
  - d. Order a “Happy Anniversary” cake (standard white with white frosting) and buy some “It’s an Anniversary” invitations.
  - e. Figure that if a party seems in order on their anniversary day, you’ll be able to get a cake and some candles at the grocery store.
  
2. You’re about to graduate college and you need a job. You:
  - a. Have already taken job preference and aptitude tests and in fact may have chosen your major based on this. You have lined up a list of potential employers whose jobs tend to match the interests and skills you have.
  - b. Talk to your teachers, counselor, friends, and family about whether they know of any jobs you could apply for.
  - c. Go to [www.idealists.com](http://www.idealists.com) and search for opportunities that feel right for you.
  - d. Get Sunday’s paper, circle a few want ads that look promising, and send in some resumes.



- e. Go full-time at your current waiter job.
3. You are three months into your dream job as a child welfare social worker. You are very busy trying to learn the job while managing a caseload. As you wake up, your thoughts go to the 15 things on your calendar for the day (school visit, home visit, unit meeting, supervision, lunch date, etc.). After spending a couple of minutes refining the schedule for the day, you notice the clock. You have overslept and are already an hour late for work! What do you do?
- a. Activate plan B, a slightly reorganized but just as effective schedule for the day that you had already developed in case there was traffic on your way in to the office.
  - b. Contact the people affected by your lateness and ask them what would work for them in terms of rescheduling the appointment.
  - c. Wonder if you overslept because your schedule was subconsciously overwhelming and decide to pay more attention to making your schedule doable.
  - d. Review the things you had planned for the day and eliminate the ones that could be done later.
  - e. You roll over and go back to sleep.

# Case Plan Preparation Worksheet

*Complete the chart below for issues relevant to engaging the Wilson family and developing their case plan. Remember, address only those issues that are relevant to the case plan and focus on achieving the MSLC.*

**List three potential barriers to engagement:**

---

---

---

**List three engagement strategies you might use with the Wilson family**

---

---

---

**List three things you could say or do to engage Mr. Wilson**

---

---

---

**List three priority needs for the family**

---

---

---

# Taking It Home

When I am back at work I want to remember.....

# Wilson Family Initial Case Plan Worksheet

Strengths	
Contributing Factors	
Priority Needs	

<b>CASE PLAN GOAL:</b>					
<b>Omar Wilson</b>					
Goal		Projected Completion Date		Projected Service Termination Date	

<b>CASE PLAN GOAL:</b>					
<b>Alejandro Wilson</b>					
Goal		Projected Completion Date		Projected Service Termination Date	

<b>CASE PLAN SERVICE OBJECTIVE:</b>	
<b>Alana Wilson</b>	
<b>Service Objective</b>	
S.M.A.R.T. Description	
Projected Completion Date	

**CLIENT RESPONSIBILITIES:**

**Alana Wilson**

Activity	Counseling/Mental Health Services General Counseling				
Times		Frequency		Completion Date	
S.M.A.R.T. Description					

**CASE PLAN SERVICE OBJECTIVE:**

**Matthew Wilson**

Service Objective					
S.M.A.R.T. Description					
Projected Completion Date					

**CLIENT RESPONSIBILITIES:**

**Matthew Wilson**

Activity					
Times		Frequency		Completion Date	
S.M.A.R.T. Description					

**CASE PLAN SERVICE OBJECTIVE:**

**Omar Wilson**

Service Objective					
S.M.A.R.T. Description					
Projected Completion Date					

**CLIENT RESPONSIBILITIES:**

**Omar Wilson**

Activity					
Times		Frequency		Completion Date	
S.M.A.R.T. Description					

**AGENCY RESPONSIBILITIES - CASE MANAGEMENT SERVICES**

Service					
For whom					
Beginning Date					

## **Develop your own two minute pitch**

**Express the importance of the subject**

---

---

**Define the concept**

---

---

**Explain the benefits**

---

---

**Give examples**

---

---

**Pull the family into the conversation**

---

---



# Wilson Family Case Plan Update Worksheet

Strengths	
Contributing Factors	
Priority Needs	

<b>CASE PLAN SERVICE OBJECTIVE:</b>			
<b>Alana Gomez Wilson</b>			
Previous Service Objective	<i>Pay attention to and monitor your child's health, safety, and well-being.</i>		
Previous S.M.A.R.T. Description	<i>Over the next six months Alana Wilson will protect her children from all non-accidental physical injury as evidenced by no new substantiated referrals for abuse or neglect involving her children.</i>		
Objective Met	Yes / No	Projected Completion Date	
Progress			
Updated Service Objective			
Updated S.M.A.R.T. Description			

<b>CLIENT RESPONSIBILITIES:</b>					
<b>Alana Gomez Wilson</b>					
<b>Activity</b>	<i>General counseling</i>				
Times	1	Frequency	weekly	Completion Date	
S.M.A.R.T. Description	<i>During the next six months Ms. Wilson will meet weekly with Rev. Orrante and will discuss her fears and other feelings about protecting her children from non-accidental injury. She will strategize about what she can do to protect them in dangerous situations. Ms. Wilson will make a list of what she can do to protect her children from dangerous situations and will discuss these with Mr. Wilson, Ms. Alvarez, and the child welfare worker within one month of signing this plan.</i>				

<b>UPDATED CLIENT RESPONSIBILITY:</b>					
<b>Alana Gomez Wilson</b>					
<b>Activity</b>					
Times		Frequency		Completion Date	
S.M.A.R.T. Description	<i>During the next six months Ms. Wilson will meet weekly with Rev. Orrante and will discuss her fears and other feelings about protecting her children from non-accidental injury. She will strategize about what she can do to protect them in dangerous situations. Ms. Wilson will make a list of what she can do to protect her children from dangerous situations and will discuss these with Mr. Wilson, Ms. Alvarez, and the child welfare worker within one month of signing this plan.</i>				

<b>VISITATION SCHEDULE:</b>					
<b>Omar Wilson, Alejandro Wilson, Alana Wilson, Matthew Wilson</b>					
Method			Beginning Date		
Description					
Times			Frequency		

**CONCURRENT SERVICES PLANNING:**

**Omar Wilson**

Concurrent  
Planning Goal

Service Plan

# Taking It Home

When I am back at work I want to remember.....