NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

Division of Social Services

North Carolina Department of Health and Human Services
CPS Assessment in Child Welfare Track Training

Participant's Workbook
Day Eight

December 2025

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This curriculum was developed by the North Carolina Department of Health and Human Services, Division of Social Services, and revised by Public Knowledge® in 2025.

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Instructions

This course was designed to guide child welfare professionals through the knowledge, skills, and behaviors needed to engage with families in need of child protection services. The workbook is structured to help you engage in the lesson through reflection and analysis throughout each week of training. Have this workbook readily available as you go through each session to create a long-lasting resource you can reference in the future.

If you are using this workbook electronically: Workbook pages have text boxes for you to add notes and reflections. Due to formatting, if you are typing in these boxes, blank lines will be “pushed” forward onto the next page. To correct this when you are done typing in the text box, you may use delete to remove extra lines.

Course Themes

The central themes of the CPS Assessment Track Training are divided across several course topics.

- Purpose and Legal Basis for Child Protection Services in North Carolina
- Essential Function: Communicating
- Diversity, Equity, Inclusion, and Belonging
- Trauma-Informed Care
- Family-Centered Practice
- Essential Function: Engaging
- Safety Focused
- Essential Function: Assessing
- Interviewing Learning Lab
- The Role of Observation in Assessing for Safety
- Structured Decision-Making: Safety Assessment
- Assessment Learning Lab
- Safety Planning
- Safety Planning Learning Lab
- Trauma-Informed Practice
- Considerations for Cases Involving Special Circumstances
- Caseworker Safety
- Engaging the Family in Child Protection Services
- Risk Assessment
- Crucial Conversations
- Quality Contacts
- Assessing Family Strengths and Needs
- Secondary Traumatic Stress and Vicarious Traumatization
- Ongoing Assessment
- Family Engagement and Ongoing Assessment Learning Lab
- Documentation
- Well-Being as an Outcome
- Reasonable Efforts and Removals
- Reasonable Efforts and Removals Learning Lab
- Decision-Making

- Decision-Making and Case Closure Learning Lab

Training Overview

Training begins at 9:00 a.m. and ends at 4:00 p.m. If a holiday falls on the Monday of training, the training will begin on Tuesday at 9:00 a.m. This schedule is subject to change if a holiday falls during the training week or other circumstances occur. The time for ending training on Fridays may vary and trainees need to be prepared to stay the entire day.

Attendance is mandatory. If there is an emergency, the trainee must contact the classroom trainer and their supervisor as soon as they realize they will not be able to attend training or if they will be late to training. If a trainee must miss training time in the classroom, it is the trainee's responsibility to develop a plan to make up missed material.

Pre-Work Online e-Learning Modules

There is required pre-work for the CPS Assessment Track Training in the form of online e-Learning modules. Completion of the e-Learnings is required prior to attendance at the classroom-based training. The following are the online e-Learning modules:

1. North Carolina Worker Practice Standards
2. Safety Organized Practice
3. Understanding and Assessing Safety and Risk
4. Understanding and Screening for Trauma

Transfer of Learning

The CPS Assessment Track Training Transfer of Learning (ToL) tool is a comprehensive and collaborative activity for workers and supervisors to work together in identifying worker goals, knowledge gain, and priorities for further development throughout the training process. In four distinct steps, the worker and supervisor will highlight their goals and action plan related to participating in training, reflect on lessons and outstanding questions, and create an action plan to support worker growth. The tool should be started prior to beginning the CPS Assessment Track Training and re-visited on an ongoing basis to assess growth and re-prioritize actions for development.

- Part A: Training Preparation: Prior to completing any eLearning and in-person Track Training sessions, the worker and supervisor should meet to complete Part A: Training Preparation. In this step, the worker and supervisor will discuss their goals for participation in training and develop a plan to meet those goals through pre-work, other opportunities for learning, and support for addressing anticipated barriers.
- Part B: Worker Reflections During Training: The worker will document their thoughts, top takeaways, and outstanding questions regarding each section. This level of reflection serves two purposes. First, the practice of distilling down a full section of training into three takeaways and three remaining questions requires the worker to actively engage with the material, subsequently forming cognitive cues related to the information for future use in case practice. Second, prioritizing takeaways and questions by section allows workers to continually review information to determine if questions are answered in future sessions and supports the development of an action plan by requiring workers to highlight the questions they find most important.

- Part C: Planning for Post-Training Debrief with Supervisor: The worker considers the takeaways and questions they identified in each section and creates a framework to transfer those takeaways and questions into an action plan.
- Part D: Post-Training Debrief with Supervisor: Provides an opportunity for the supervisor and worker to determine a specific plan of action to answer outstanding questions and to further support worker training.

While this ToL is specific to the Track Training in North Carolina, workers and supervisors can review the takeaways and questions highlighted by the worker in each section of training on an ongoing basis, revising action steps when prior actions are completed, and celebrating worker growth and success along the way.

Training Evaluations

At the conclusion of each training, learners will complete a training evaluation tool to measure satisfaction with training content and methods. The training evaluation tool is required to complete the training course. Training evaluations will be evaluated and assessed to determine the need for revisions to the training curriculum.

All matters as stated above are subject to change due to unforeseen circumstances and with approval.

Learning Objectives

Day Eight

Decision-Making
• Learners will be able to describe how caregiver behavior impacts child safety.
• Learners will be able to describe how to incorporate all safety and risk factors into the comprehensive family assessment.
• Learners will be able to develop strategies to adequately address safety and risk factors within ongoing case planning activities.
• Learners will be able to distinguish between safety and risk when considering instances of abuse and neglect.
• Learners will be able to identify and describe danger indicators and risk factors when working with children and families.
• Learners will be able to explain the importance of engaging families in the decision-making process.
• Learners will be able to outline the process for case decision making, including case closure.
• Learners will be able to discuss information needed to make informed case decisions.
• Learners will be able to describe strategies for preparing for staffing meetings with supervisors.
• Learners will be able to outline required notifications and associated timeframes at the conclusion of an assessment.
• Learners will be able to describe the requirements and process for adding an individual to the RIL.
• Learners will be able to describe the requirements and process for adding an individual to the central registry.
• Learners will be able to discuss case dynamics related to domestic violence and how they factor into case closure decisions and ongoing planning.
• Learners will be able to identify and apply policy requirements related to cases involving domestic violence.

• Learners will be able to discuss case dynamics related to domestic violence and how they factor into case closure decisions and ongoing planning.
• Learners will be able to identify and apply policy requirements related to cases involving domestic violence.
• Learners will be able to identify and demonstrate strategies for communicating case decisions to children and families.
• Learners will be able to provide examples of appropriate ongoing support for families after case closure.
Assessing Family Strengths and Needs
• Learners will be able to describe the purpose of SDM tools used to support assessments.
• Learners will be able to describe the skills needed to engage all family members in identifying strengths and needs in the assessment process.
• Learners will be able to describe the importance of using the Family Assessment of Strengths and Needs Tool in case planning.
• Learners will be able to outline the requirements in the assessment policy.
• Learners will be able to explain how to use the NC Family Strengths and Needs Assessment in case planning activities.
Decision-Making and Case Closure Learning Lab
• Learners will be able to explain how to use the NC Family Strengths and Needs Assessment in case planning activities.
• Learners will be able to identify policies and protocols for case transfer from assessment to in-home or permanency planning services.
• Learners will be able to describe best practices to support the family during case transfer.
• Learners will be able to identify and demonstrate strategies for communicating case decisions to children and families.
Worker Safety
• Learners will identify, discuss, and apply strategies to promote their physical, psychological, and emotional safety and well-being.

• Learners will be able to discuss strategies that promote their physical, psychological, and emotional safety.
• Learners will be able to discuss their self-care plan with an accountability partner and seek out support when needed.
• Learners will recognize at least three signs of danger and at least three methods of avoiding or mitigating danger when conducting after-hours or on-call tasks.

Day Eight Agenda

CPS Assessment Track Training

Welcome

Decision-Making

Decision-Making and Critical Thinking

Supervisory Support

Case Decision

Case Transfer

Assessing Family Strengths and Needs

Family Strengths and Needs Assessment

Decision-Making, continued

Case Closure

Case Closure Notification

Decision Making and Case Closure Learning Lab

Decision Making Learning Lab

Case Transfer Learning Lab

Worker Safety

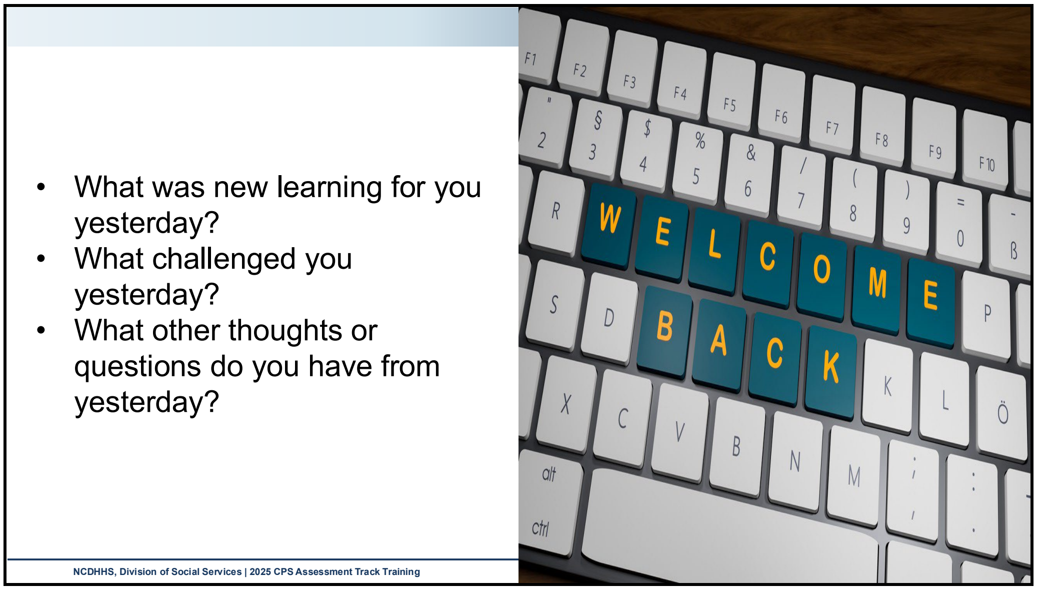
Considerations for After Hours and On-Call Duty Hours

Worker Well-Being

Self-Reflection Training Wrap-Up

Child Welfare Track Training: CPS Assessment Day 8

Welcome



Use this outlined space to record notes from the introduction activity.

Decision-Making

Decision-Making and Critical Thinking

Case Decisions

Shared decisions include:
- the county child welfare worker
- the county child welfare supervisor (or staffing team)

Based on the legal definitions, explain:
- explain the context of the abuse, neglect, and/or dependency
- how it relates to the child maltreatment

Document:
- specific caretaker behavior that resulted in harm to the child
- or clarify the absence of risk of harm
- the need for continued involuntary services to address the identified safety issues and future risk of harm to the child

Identify:
- the effects of neglect, abuse and/or dependency on the child
- the steps taken by the agency and/or parent to protect the child

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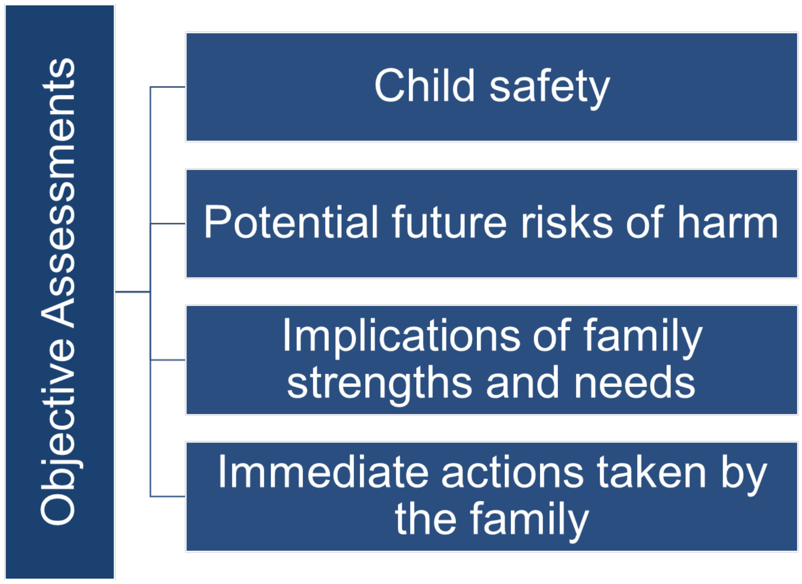
Decision-Making and Critical Thinking



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Worksheet: Shared Values

Values are beliefs that are grounded by the principles most of us live by each day. Consider the values below.

Adaptability	Diversity	Knowledge
Achievement	Devotion	Leadership
Ambition	Empathy	Love
Authenticity	Energy	Loyalty
Acceptance	Equality	Maturity
Accomplishment	Fairness	Obedience
Bravery	Forgiveness	Openness
Beauty	Friendship	Passion
Balance	Fun	Purpose
Caring	Giving	Recognition
Certain	Growth	Respect
Control	Happiness	Security
Courage	Hard work	Spirituality
Community	Health	Strength
Compassion	Independence	Success
Creativity	Integrity	Teamwork
Dependability	Intelligence	Wealth
Dignity	Justice	Wisdom

Use this space to record notes.

Personal Considerations

Activity: Personal Considerations

From the group-generated list of emotions that impact our work with families, select three emotions to personally explore the ways these emotions may impact your behavior and decision-making with families.

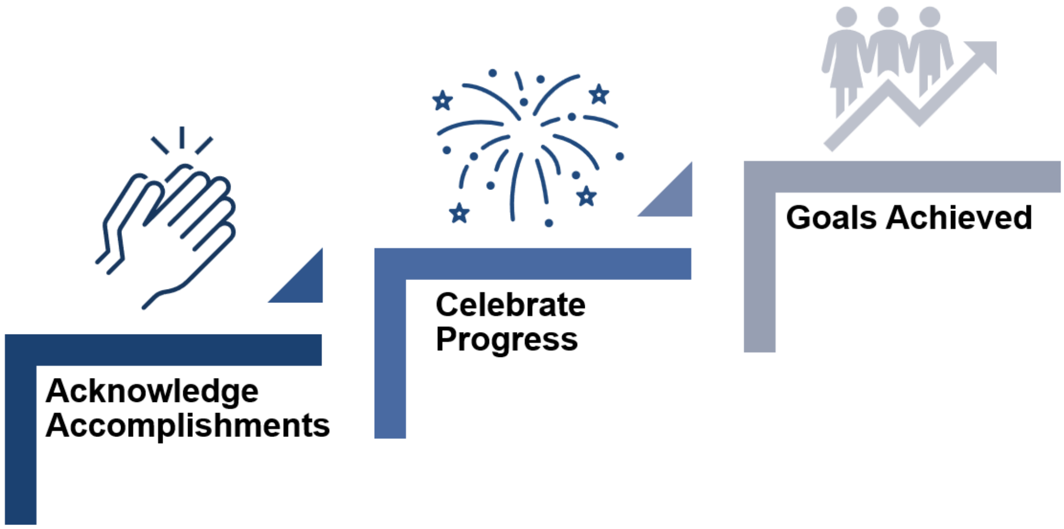
Use the spaces below to record your thoughts.

Emotion:

Emotion:

Emotion:

Encouraging Progress



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Supervisory Support

Two-Level Decision-Making

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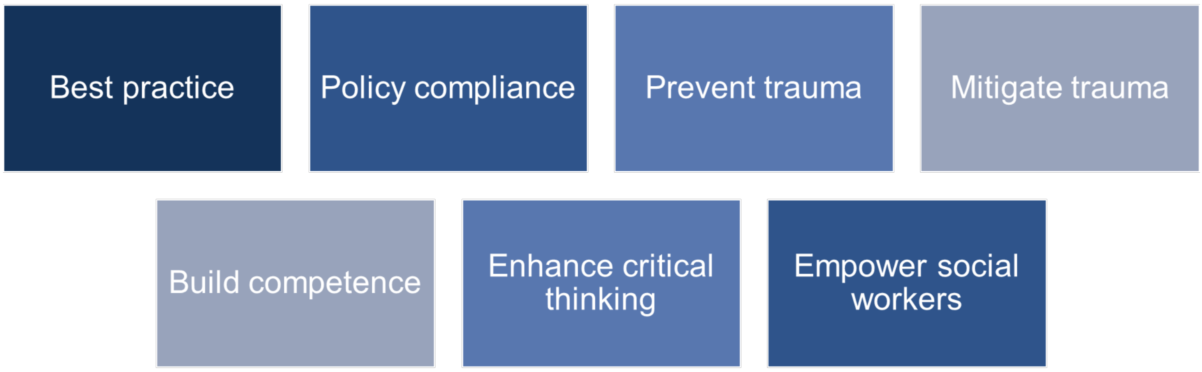
Two-Level Decision-Making: Supervisory Consultation



Three main functions of supervisors are administrative, educational, and supportive.

Supervision provides coaching for best practice and policy compliance, support to prevent and mitigate the impact of trauma, and opportunities to build competency and critical thinking.

Use this space to record notes:

Activity: Supervisory Consultation and Coaching

Review the example coaching session. Respond to the questions.

Exhibit 13.3 Example of a Full Coaching Session

Carolyn is the supervisor, Mattie is the worker. The two are meeting in Carolyn's office after Mattie requested via email for Carolyn to meet with her. Mattie is feeling overwhelmed and unfocused at work.

Carolyn: Hello Mattie, how are you feeling today?
Mattie: I'm good. Well, I'm trying to be good. I'm trying to feel good!
Carolyn: I got your email and I know there is a lot that you wanted to talk about today. But, before we get started, I just want to take a minute to clear our thoughts so that we can be present ere today. I will make sure that my phone is off, so that we won't be disturbed. I let everyone know that I'm here with you in supervision, so we shouldn't have any interruptions. How does that sound?
Mattie: Great! I'll also put my phone away.
Carolyn: Let's take a few deep breaths together to clear our minds. Let the stress of the day go away so that we can have a productive conversation.
Mattie: Sure. I need that.
Carolyn: Breathe in … let it out … breathe in again ….
Mattie: (Doing the breathing exercise)
Carolyn: Are you feeling ready to start?
Mattie: Yes, sure.
Carolyn: When you are ready, you can tell me what's going on.
Mattie: I am not able to keep up with the daily tasks and to do's for each of my cases. Especially with my case documentation! Contacting collaterals and doing interviews require me to document progress notes each time. Because of my heavy workload, I'm now behind on my paperwork! I also struggle with finding time to invest in my professional development.
Carolyn: Thank you for being so honest with where you are in your documentation. You are thinking ahead and being proactive. I also do appreciate your commitment to continue to grow as a worker. These are two very important areas of your work. Which would you like to focus on today?
Mattie: I feel that the most pressing issue for me today is to catch up with my documentation.
Carolyn: Sounds like for today's conversation you would like to focus on how to get up-to-date with your progress notes?
Mattie: Yes. I am one month behind on progress notes in our computer system. I think finding the time is an issue … maybe having a plan … maybe figuring out what is priority? Then working on those first. However, because I believe everything is important, I can't figure out what should be done first!
Carolyn: What I hear you say is figuring out how to best prioritize may help you in getting caught up on your documentation, and is something you want to work on today?
Mattie: Yes, it is a struggle keeping up with the case notes, making the home visits … and recently going to the field is a challenge because I don't feel comfortable going out when I need to catch up on the documentation. It's like I'm being tugged back to my desk. I have so many things to do, and it is a struggle to balance my responsibilities … and this includes my professional development … they are all important. Especially with my caseload being higher than usual, I'm challenged. I have to find a way to strike a balance!

Exhibit 13.3 Example of a Full Coaching Session

Carolyn: I agree. All the work you do is very important and finding that balance especially during difficult times can be overwhelming. How have you managed high caseloads in the past?
Mattie: (pause) Hmm … Let me think back. Last time my caseload spiked, I was able to work on time management by having a daily work schedule.
Carolyn: It sounds like having a schedule to better manage your time throughout the day worked for you in the past. Please tell me more about what that schedule looks like.
Mattie: From what I recall, the daily schedule did help me to manage my cases and documentation better, however I can't remember the details of what it looked like. To be honest, the thought of finding time to create a schedule now seems unrealistic since I am already behind on my paperwork.
Carolyn: I sense that you feeling overwhelmed, and that there is not enough time in the day to get everything done. What is contributing most to you feeling this way?
Mattie: The paperwork!!! What seems to be most pressing is getting caught up with the progress notes. I think the cases are going to keep coming in … and each requires its own documentation. If I'm able to work on updating my notes and keeping up with my daily documentation, then perhaps managing that one thing, can lend to managing all the others.
Carolyn: What I hear you saying is, figuring out a way for you to catch up with your documentation and remain caught up is the first step … am I hearing you correctly?
Mattie: Yes! I need to catch up with my notes ASAP so that I can move my cases along.
Carolyn: Let's brainstorm …. What ideas do you have that will help you catch up on your notes?
Mattie: I think I can start by reviewing my cases and making a note of which need to be worked on first. To come up with sort of a timeline of which cases are most behind versus least behind. This will help me structure myself and organize how I will begin to get the documentation in.
Carolyn: That's a great idea. What other ideas do you have?
Mattie: Let me think … another option could be …work on a creating a schedule for the day. Maybe I need to come up with an agenda, a plan of my own, with a daily plan of my daily work. For example, I come in at 9 a.m. and the first thing I do is to check my emails and that takes me 15 minutes. And then the next thing I do, should be to look at my to do's, on the computer system, to see what's priority and that should take me 5 mins. Something like that.
Carolyn: So wonderful, it sounds like you have already come up with two possible solutions. The first is for you to sit down and prioritize your cases, the second is to develop a daily work schedule.
Mattie: Maybe finding a way to ground myself in the work or, or to focus. That's my problem. I am not focused!
Carolyn: Tell me a little bit more about that?
Mattie: I'm the social person at work … you know that, I talk a lot. I have all these friends and people in my area who want to chitchat. It's like they, they think that I come to work every day to be their chat buddy. And maybe I'm the one who started that trend. This has been an ongoing struggle for me but it's one of my time wasters, the chitchatting.
Carolyn: Okay ….
Mattie: I like to be friendly, however lately the conversations are less about work and more about current events and reality TV! I find that because of our work environment, how our cubicles are situated, plus the idea of everyone thinking that I have feedback/comments to share about everything. Too many distractions for me!
Carolyn: That's some great insight into who you are as a person, and a worker. You also came up with two possible ways to help you with documentation, and now that we are brainstorming a third, you had this great realization that you need some help in staying focused. What ideas do you have in mind to help you with being focused?

Exhibit 13.3 Example of a Full Coaching Session

Mattie: Oh my God!! Can I just move my cubicle off of the floor? I know we don't have a lot of space, but somewhere secluded. That would be great. Because I think, in isolation I work better. Being a part of the mix of conversations that's happening on the floor is not helpful to me being focused. I have this new colleague who is sitting next to me and she has all these questions because I'm the seasoned worker. Every two minutes, she interrupts me and I feel bad and don't want to say anything to shut her down or hurt her feelings. However, I think I'm encouraging a habit. I think I need to put a sign up on my desk stating that I am working on something or that, "I'm busy, progress notes in session," or something like that.
Carolyn: That sounds great. Definitely putting up a sign could work. What other ideas do you have for getting focused?
Mattie: I can put my headphones on.
Carolyn: Another great idea. There are lot of people around in the office to distract you.
Mattie: I'm sure it will help to tune things out.
Carolyn: Any other ideas?
Mattie: Just to be able to message to people that I'm currently unavailable and have work to do!
Carolyn: It sounds a little bit like you're talking about setting boundaries.
Mattie: Yes!
Carolyn: So that you can get your work done.
Mattie: Exactly! I need to clip my social-butterfly wings.
Carolyn: I think those are great ideas to begin to help you to get caught up on your documentation. Your first idea was for you to go through all of your cases, sort and prioritize them. The second was for you to develop a daily schedule with time frames and the third was this sort of realization that you need to become more focused. You also said that by getting more focused, which looks like maybe putting a sign up, maybe putting your headphones on, and setting some boundaries with your peers and colleagues. Of those three ideas, which do you feel will be most helpful in your goal of trying to get all caught up on your documentation?
Mattie: I feel that what would be most helpful is if I sit down, look at my cases and prioritize them.
Carolyn: It sounds like the thing that's going to help you most immediately then is really to prioritize your cases? To look at what needs to be addressed and completed first and work your way back from that. Am I right?
Mattie: Yes.
Carolyn: So, tell me a little bit more about this idea and what would be most helpful to you to start?
Mattie: To start, I need to put aside some time so that I can sit down and look at my cases and come up with something concrete.
Carolyn: So having a concrete plan of action is something that may help you at this time?
Mattie: Yes. Creating a chart with the cases listed and identify which cases are ready or almost ready to be transferred, closed etc. Ranking what is most important to least important. To create sort of a roadmap or vision board to help guide me.
Carolyn: What does that look like for you?
Mattie: It looks like a chart that I can put on my wall and next to my computer. That at-a-glance it can guide and help me keep track of my progress. I can picture it to be a landscape sheet of paper with all the details.
Carolyn: I imagine that maybe that's the first step …. Developing a chart?
Mattie: Yes! Yes! That is it!
Carolyn: How can I support you in that?
Mattie: I can work on getting the chart made, and perhaps you can help me to fill in the details?

Exhibit 13.3 Example of a Full Coaching Session

Carolyn: That sounds doable … it does sound like a doable plan. When do you believe you can have the chart made so that we can start to fill it out?
Mattie: Wow! Now I have to make time to do this. Maybe sometime next week? I'll work on notes on Monday, so maybe next Tuesday?
Carolyn: So you would have the chart ready by Tuesday?
Mattie: Yes.
Carolyn: And when would you like for us to sit down again to fill it out?
Mattie: On Wednesday, maybe?
Carolyn: Looking at my calendar, does Wednesday at 11 a.m. work for you?
Mattie: Yes, that works. Now that we have talked about this, I am thinking that I should start to work on documenting as soon possible. That documentation is the priority it seems. The sooner my notes are in, the faster I can do all the other things.
Carolyn: Sounds like you are prioritizing already as we are having this conversation! You seem very committed to actualizing the plan you came up with, to ensure that you get caught up with your documentation.
Mattie: Yes, this is helping me to organize my thoughts and how to get this done.
Carolyn: And you are coming up with a bit of an action plan.
Mattie: Yes, I think so. Work in progress.
Carolyn: Let me recap. You are going to create the chart and decide what items take priority and we will meet back here together on Wednesday to review your progress … and continue to prioritize the cases. What if something gets in the way of you carrying out this plan?
Mattie: I am going to go back to my desk and write some bullet points to remind myself of what we came up with as a plan. And so if something gets in the way, a barrier or a crisis comes up, I'll still have this plan to go back to. That this will remain the plan on how to move forward regardless of if anything comes up.
Carolyn: What support or resources do you need you to help achieve this goal?
Mattie: As a check-in, an email reminder maybe?
Carolyn: When would you like me to check in with you?
Mattie: At the end of the week.
Carolyn: Okay, I will check in with you at the end of the week to see how you are progressing with creating the chart and we will meet next Wednesday to review it.
Mattie: Sounds like a plan! Can you also please send me a meeting invite?
Carolyn: Sure, I can certainly send you a meeting invite as well to help get back on track. Sounds like we have a plan. How are you feeling about the plan?
Mattie: It feels good to have a plan to start to address the issue of being behind on my documentation. And it seems tangible.
Carolyn: When you came in today, you were feeling a little stressed out ….
Mattie: Very stressed out! I'm glad that we had an opportunity to sit down and discuss this.
Carolyn: How are you feeling now?
Mattie: Much better!
Carolyn: Tell me, how helpful was this meeting? On a scale from 1 to 10, 1 being not so helpful , 10 being very helpful?
Mattie: Up there … hmm, an 8!!! I now have some concrete things to go back and work on.
Carolyn: I'm very glad that you found this conversation helpful. I am looking forward to further support you through this. And I am also looking forward to Wednesday to review your chart. Thank you!
Mattie: Thank you Carolyn.

Worksheet: Supervisory Consultation and Coaching

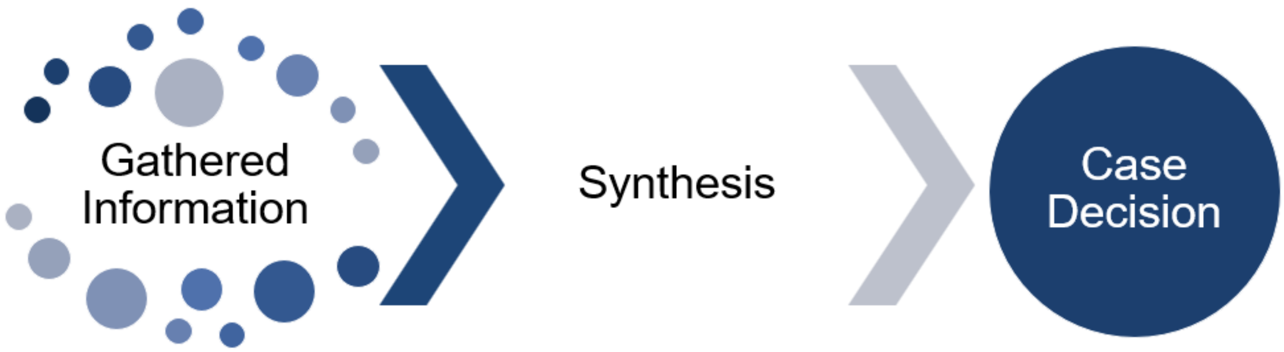
Discussion Questions	
What did the supervisor say and do to support the case worker?	
What did your supervisors discuss withyou during case staffing?	
What impact does supervisory coaching have on critical thinking?	
How will you prepare for coaching with your supervisor?	

What do you need from your supervisory sessions to develop your skills?	
What can you ask for from your supervisor on how they can better support you?	
How often during a CPS Assessment should two-level decision-making occur?	
Reflections and Notes	

Source: DePanfilis, D. (2018) Chapter 13: Supervision. *Child Protective Services: A Guide for Caseworkers*, 152-155. U.S. Department of Health and Human Services, Administration for Children and Families, Administration on Children, Youth and Families, Children's Bureau, Office on Child Abuse and Neglect. https://capacity.childwelfare.gov/sites/default/files/media_pdf/cps2018.pdf

Case Decision

Case Decision Process



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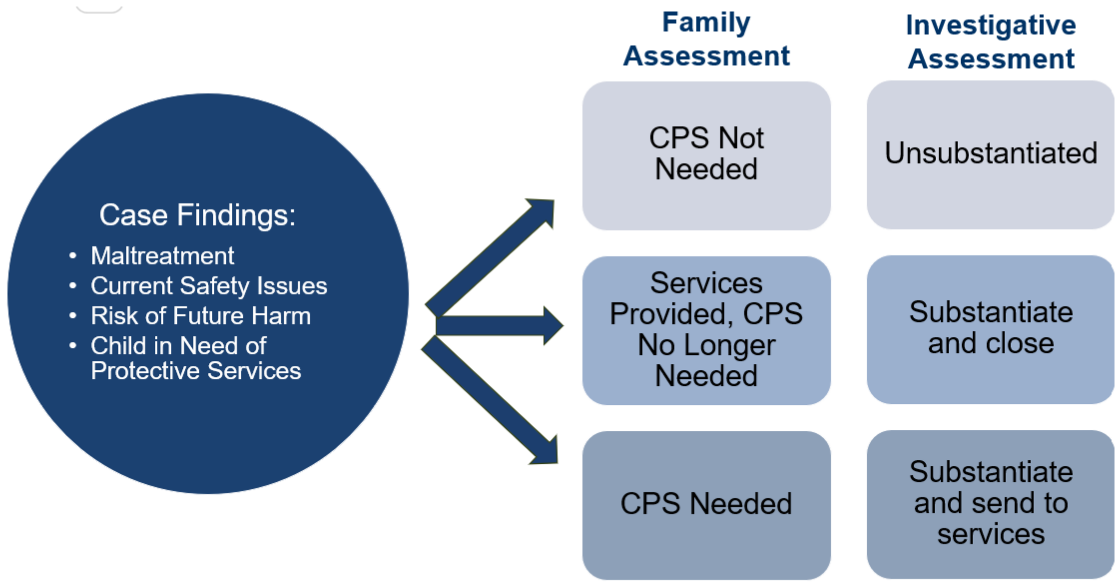
Case Decision



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Case Decisions when Domestic Violence is Present

Children involved in violence

Chronic or severe

Extreme emotional or behavioral problems

Substance use coexisting

Observed by children

Injuries requiring hospitalization

Child aligned with perpetrator of violence

Adult victim isolated

Adult victim is restricted financially/from community resources

When completing the four questions that are a part of the case decision, the answers to the following questions must also be included:

- Have the children intervened in the domestic violence? Whether the child was injured or not, their direct involvement presents extreme risk.
- Is there an established pattern of domestic violence that is chronic or severe?
- Have the children exhibited extreme emotional or behavioral problems, or been diagnosed with mental health conditions such as PTSD, depression, anxiety, or fear because of living with domestic violence?
- Has there been a coexistence of domestic violence and substance abuse that impedes the non-offending parent or adult victim's ability to assess the level of danger in the home? Substance abuse may exacerbate the violence, increasing risk to the children and non-offending parent or adult victim.
- Has the non-offending parent or adult victim been threatened or injured in the presence of the children?
- Has the non-offending parent or adult victim been hospitalized for injuries resulting from domestic violence?
- Is the child aligned with the perpetrator?
- Has the non-offending parent/adult victim been isolated from family/friends?
- Has the non-offending parent/adult victim been restricted in accessing financial and community resources?

You will be prompted in PATH NC to answer these questions when DV is listed as a maltreatment in the accepted Intake report. When DV is not listed in the accepted Intake report, and the Assessment caseworker finds DV during the course of the assessment, the caseworker must add it as a maltreatment in PATH NC at the case decision. You will then be prompted to answer these questions associated with DV at the case decision.

Case Transfer

Case Transfer

Knowledge

Relationship

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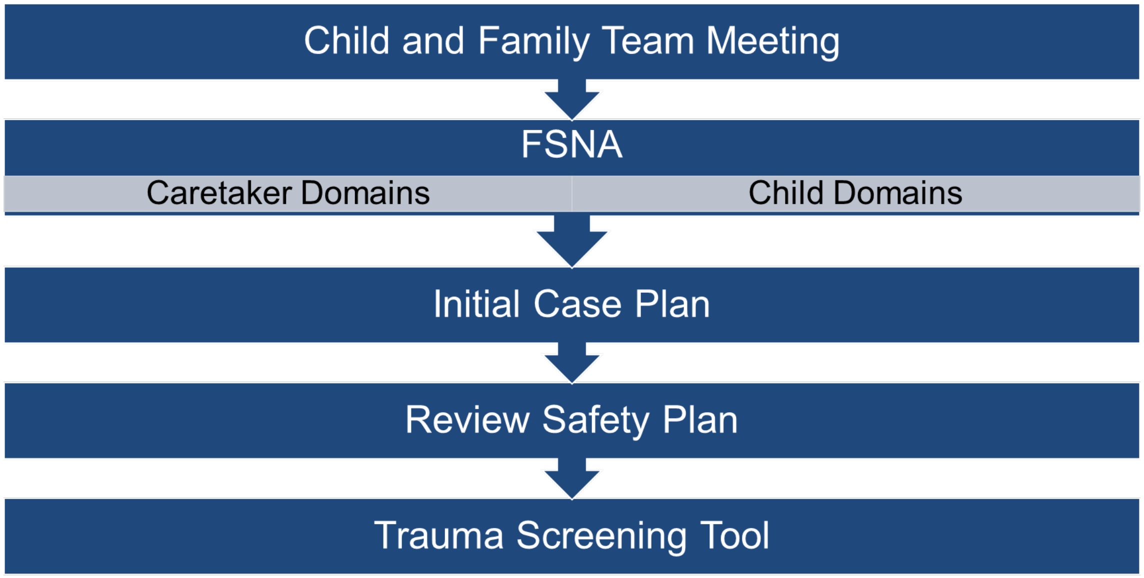
Case Transfer Tasks: Opportunities to Engage



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Handout: Guide for Conducting Case Transfers

Guide for Conducting Case Transfers

Caseworkers can use the following guide to structure case transfer meetings.

Suggested Participants:

1. Transferring Caseworker
2. Transferring Supervisor
3. Newly Assigned Caseworker
4. Newly Assigned Supervisor
5. Family Team Members (Parents, child, family support, etc.)
6. Placement Provider

Suggested Agenda:

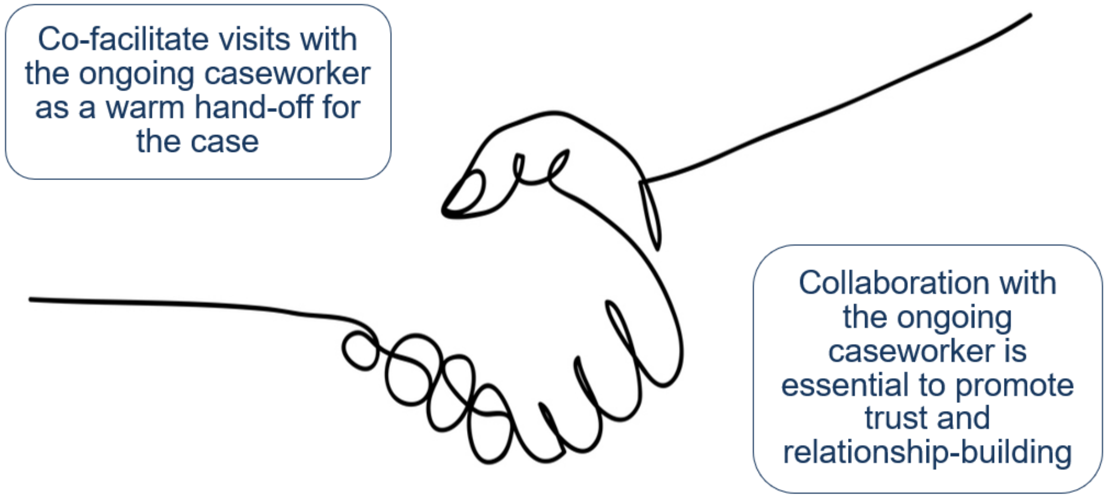
1. Introductions
    a. All attendees introduce themselves, their role, and their relationship with the family
        i. Newly assigned caseworker and supervisor should provide the family with their contact information
    b. Transferring caseworker reviews the purpose of the meeting and facilitates the development of group agreements. To facilitate, transferring caseworker might ask "What do group members need in order to make this a safe and respectful place for our discussion?"
        i. Group agreements might include
            1. Make space for everyone on the team to contribute.
            2. One person talks at a time; everyone will have a chance to share their thoughts
            3. Respect confidentiality.
            4. All ideas are valid.
            5. Respect the perspective of everyone in the room, even if your perspective does not align with theirs.
            6. Stay strengths-based and result-driven
2. Child Welfare Involvement
    a. Review of why child welfare is involved with the family
    b. Review North Carolina Safety Assessment Tool and North Carolina Risk Assessment Tool
    c. Discuss interventions that have been used to prevent removal and the outcomes of those interventions
3. Family Strengths
    a. Review Family Assessment of Strengths and Needs Tool
    b. Discuss the parental protective factors identified during the assessment
    c. Ask family members and other supports present at the meeting to identify additional strengths the family possesses
4. Family Supports
    a. Identify existing supports, including family, informal, and formal supports
    b. Explore additional supports, including additional options for relative or fictive kin placements if the child is not already placed in a relative or fictive kin setting
    c. Discuss options for how to include additional family and informal support in current or future planning

5. Family Needs
    a. Review Family Assessment of Strengths and Needs Tool
    b. Discuss steps to address needs with family, informal, or formal support options
    c. Ask family members and other supports present if other needs are present and/or if they have any questions or concerns regarding the needs identified in the Family Assessment of Strengths and Needs Tool
6. Next Steps
    a. Discuss Continuing Needs and Safety Requirements (DSS-5010a) to review ongoing family needs and activities to address identified safety concerns
    b. Review upcoming important dates (i.e. court hearings, and other team meetings)
    c. Newly assigned caseworker schedules the next home visit

Other Helpful Tips:

1. When transferring from CPS Assessment or In-Home Services to Permanency Planning, contacts with the family must be made within seven days of the case decision (CPS Assessment) or out-of-home placement.
    a. This initial contact with the CPS Assessment or In-Home Services caseworker can be in addition to a formal case transfer meeting, giving the family another opportunity to meet and engage with the Permanency Planning caseworker prior to terminating their professional relationship with the CPS Assessment/In-Home Services caseworker.
2. Be sure to use clear, concise language that all team members can understand. Avoid jargon and acronyms and define the terms that you use that may not be commonly understood outside of a child welfare space.
3. It is important that both caseworkers, the parents, and children all participate in the case transfer meeting to ensure that the relationship established between the transferring caseworker and the family is transitioned to the newly assigned caseworker.

Initial Contacts



Contact with family must occur within seven days of the case decision for both In-Home and permanency planning services

Use this space to record notes.

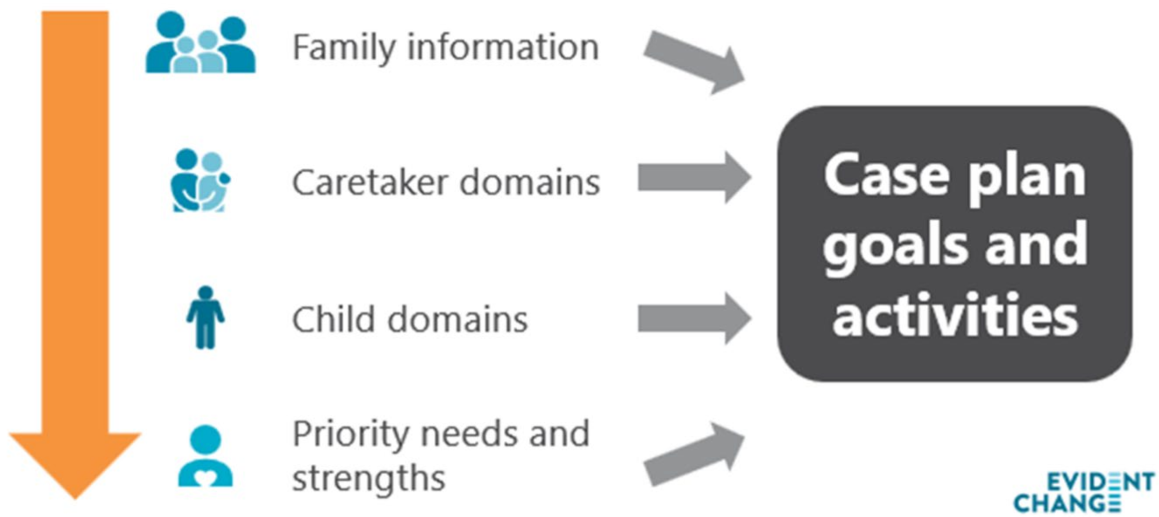
Assessing Family Strengths and Needs

Family Strengths and Needs Assessment

NC Family Strengths and Needs Assessment

Use this space to record notes.

FSNA Structure



The FSNA is completed on all cases transferring from a CPS Assessment to Ongoing services.

- Caretaker domains are completed on all cases
- Child domains are completed:
  - In-Home transfer, completed for the identified child when challenging child characteristics are marked on the FSNA
  - In-Home transfer, completed for each child if the children are placed in TSP
  - Permanency Planning transfer, completed for all children

Use this space to record notes.

Family Strengths and Needs Assessment

Activity: Family Strengths and Needs Assessment

Part One: Collective Interview

- Trainers will distribute hard copies of the FSNA to each participant
- Trainers will role-play as George and Raymond
- Participants will ask questions to solicit information needed to complete the FSNA and Child Domains for Raymond
    - Consult with the SDM® FSNA Policy and Procedures Manual from the state website

Use this space to record notes.

Part Two: FSNA/CSNA Completion

Use information from the collective interview to complete the FSNA and Child Domains for Raymond.

Part Three: Debrief

What are one or two identified areas of strength?

What are the two identified areas of need that will be addressed on the Family Case Plan in Permanency Planning Services?

Initial Case Plan

Activity: Initial Case Plan

Work with your group to develop goal statements for the Lewis family.

- Remember the formula for a goal statement: A clear, simple statement about what the caretaker will DO to demonstrate to everyone that the child is safe now and will be safe in the future.

Translate the prioritized needs discussed in the last exercise into behaviorally specific changes to create strong initial case plan goal statements.

- As a group, select your best goal statement and identify someone to report-out

Use this space to record goal statements.

Decision-Making, continued

Case Closure

What is a safe home?

Activity: What is a Safe Home?

As a large group, brainstorm to assess what defines a “safe home”; trainers will chart responses.

- With your group, discuss if any items on the list seem like over-surveillance of families
- Since the brainstorm was done quickly, there will be some items you may want to rethink

Use this space to record notes.

Discuss what you think is needed minimally for a home to be “safe.”

Use this space to record notes.

Addressing Worry and Risk

Activity: Addressing Worry and Risk

Work with your partner to create a list of ways in which you can address your own worry or identified risk that doesn't create a safety threat.

Use this space to record notes.

Case Closure Notification

Case Closure Notifications

Notifications: All Cases

- Parents or caretakers
- Reporter
- Central Registry

Notifications: When Applicable

- Responsible Individuals list
- Agency that has vested legal custody
- Licensing authority

Use this space to record notes.

Decision Making and Case Closure Learning Lab

Decision Making Learning Lab

Activity: Decision Making Learning Lab

Part One:

- With your group, consider the information you have gathered over the course of this eight-day track training on the Avilla Chavis family
- Use this information to complete the SDM Tools
- Each small group will complete a case completion Safety Assessment and a Family Assessment of Strengths and Needs (DSS-5229) for the family
- You will need at least two people to complete these forms

Part Two:

- Each group will staff their case with a supervisor
- In your groups, please choose a volunteer to act as the supervisor
- That person will staff the case with you, focusing on asking open-ended questions that determine if you have met reasonable or active efforts to preserve family integrity and whether you have met all of the case procedures

What reflections do you have from this exercise?

What will you remember to do in the field when you are making case decisions?

Case Transfer Learning Lab

Case Transfer Learning Lab

The trainer will provide worksheets for each case family member for this activity.

Because we will be filing a non-secure custody order and juvenile petition in juvenile court, the Lewis family case will be transferred to Permanency Planning Services.

- Each small group will hold a simulated case transfer meeting with the CPS Assessment social worker, the permanency planning social worker, a supervisor, and the parents, George and Monica
- The process for case transfer differs in each county; for this practice, the focus will be on introducing the new social worker, ensuring there is a shared awareness of the reasons the case moved to custody, the purpose of permanency planning services, and the next steps
- Decide who will play each role and hand out role sheets to the corresponding team members
- Consider the following agenda for the transfer team meeting:
  - Introductions
  - Ground Rules
  - Purpose of the meeting
  - Overview of permanency planning services
  - Next steps
  - Closing

What reflections do you have on case transfer meetings?

What stood out to you during your meeting?

What helped to support continuity of care for the family?

What will you take with you into case transfer in the future?

Worker Safety

Considerations for After Hours and On-Call Duty Hours

After Hours and On-Call

Use this space to record notes.

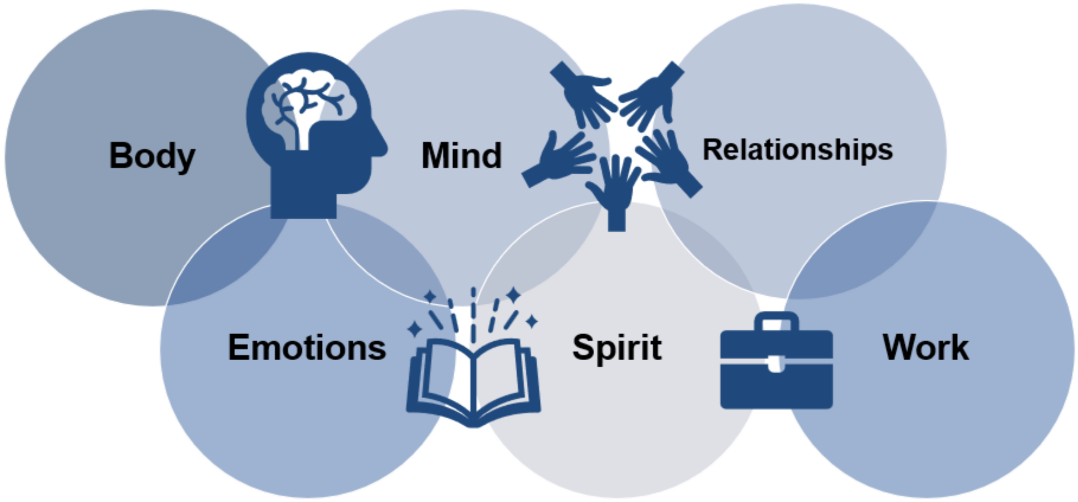
Worker Well-Being

Planning for Self-Care

Self-care planning is a tool for claiming our ability to prevent and intervene in impact stress and building support in the areas where we have control.

Use this space to record notes.

Dimensions of Well-Being



How well is your Self-Care Plan working for you today?

Where are you successful?

Where do you need support?

What are the barriers? Focus on addressing barriers, if any exist, and identifying supports to assist you.

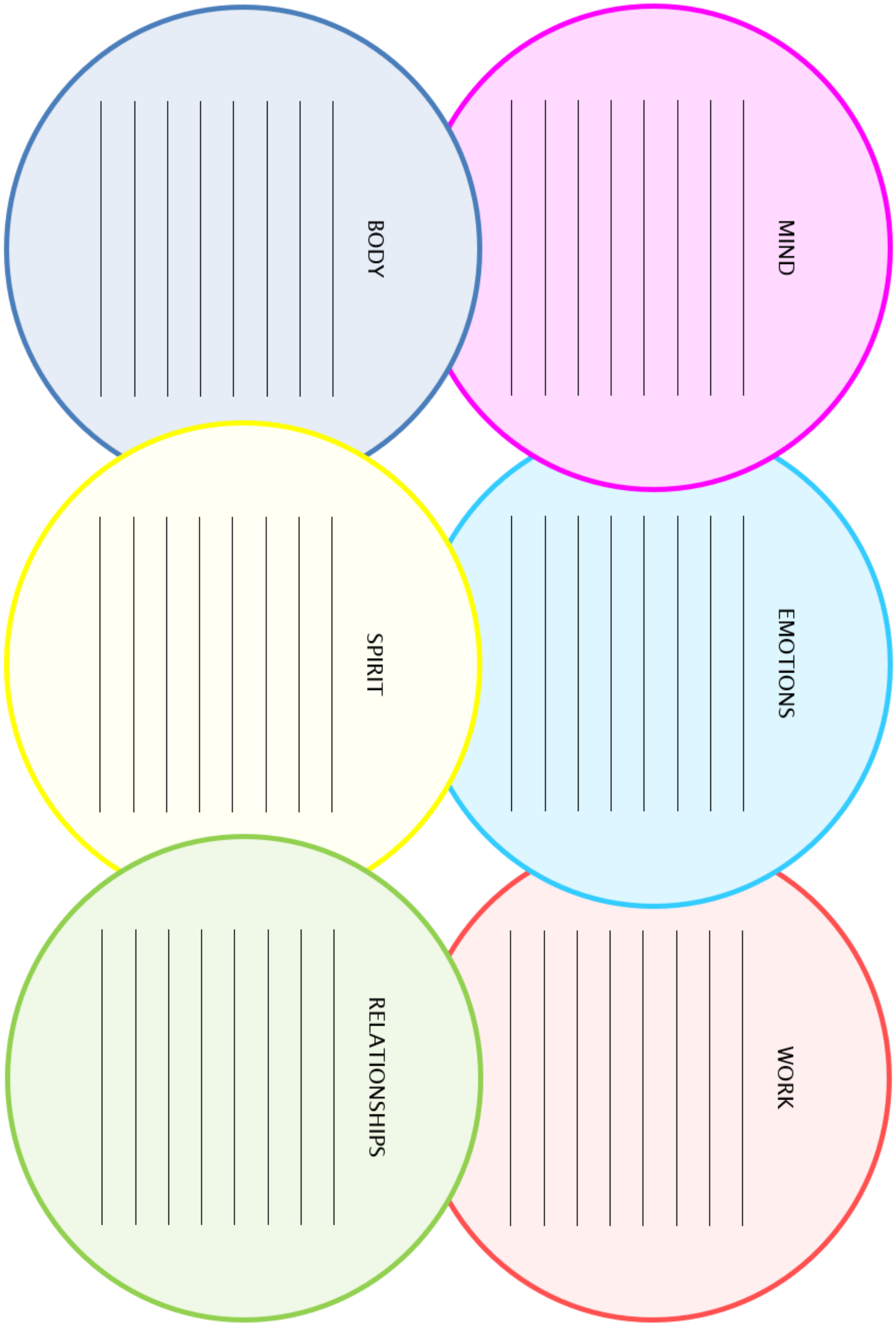
How was this experience similar to what parents or caregivers might feel when we talk with them about self-care or well-being?

How does this experience inform your conversations with families about balancing work and life responsibilities?

What will you commit to doing differently to care for yourself in the future?

Worksheet: Self-Care Strategies

Name: __________ Date: __________ Accountability Partner: __________



Self-Reflection Training Wrap-Up

North Carolina Practice Model Roadmap

Use this space to record notes.

Reflections

Where do you excel?

Where are the areas you can grow?

Use this space to record notes.

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Day Eight

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