



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

Division of Social Services

North Carolina Department of Health and Human Services Permanency Planning Services Track Training

Participant Workbook Day Five

August 2026



**PUBLIC
KNOWLEDGE®**

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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 later.

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

Course Themes

The central themes of the Permanency Planning Track Training are divided across several course topics.

- Purpose, Practice Standards, and Legal Aspects
- Disproportionality in Child Welfare Services
- Indian Child Welfare Act of 1978 (ICWA)
- Communicating
- Family Engagement
- Assessing in Permanency Planning Services
- Trauma-Informed Practice
- Permanency Plans and Concurrent Planning
- Attachment
- Family Engagement: Family Time and Shared Parenting
- Working with Relatives
- Partners in the Permanency Planning Process
- Permanency Planning with the Family
- Permanency Planning Family Case Plan
- Child and Family Team Meetings
- Authentically Engaging Children and Youth
- Family-Centered Permanency Planning
- Quality Contacts
- Preparing for Permanency
- Engaging Relatives
- Placement
- Placement with Relatives
- Monitoring the Permanency Planning Family Case Plan
- Achieving Permanency
- Termination of Parental Rights
- Adoption
- Documentation
- Worker Safety

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 will be late. 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 Permanency Planning Track Training in the form of online e-Learning modules. Completion of the eLearnings 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 (TOL) Tool

The Permanency Planning Track Training Transfer of Learning (ToL) tool is a comprehensive, collaborative activity for workers and supervisors to identify worker goals, knowledge gains, and priorities for further development throughout the training process. In four distinct steps, the worker and supervisor will highlight their goals and action plan for participating in training, reflect on lessons and outstanding questions, and create an action plan to support the worker's growth. The tool should be started prior to beginning the Permanency Planning 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 participating in training and develop a plan to meet those goals through pre-work, other learning opportunities, and support to address anticipated barriers.
- Part B: Worker Reflections During Training: There is space in each topic for workers to record their notes. For many slides, questions prompt workers to reflect on why the materials matter and how they will apply them in their practice. Some, but not all, of these questions may be asked by the training facilitator during the training. Each section includes a "Reflections & Check-In" at the end, where the worker will document their thoughts, takeaways, and outstanding questions. 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 session, learners will complete a training evaluation tool to assess satisfaction with the training content and methods. The training evaluation tool is required to complete the training course. Training evaluations will be used 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.

Day Five Learning Objectives

Permanency Planning with Families (continued)
Learners will be able to describe the purpose and timeframes associated with concurrent planning to case participants.
Learners will be able to demonstrate how to engage case participants in conversations regarding concurrent planning to develop comprehensive plans that prioritize family voice and choice.
Learners will demonstrate service planning that considers identified needs and culturally responsive practice.
Learners will engage service providers in permanency planning processes.
Learners will consider family voice and choice in service planning.
Family-Centered Permanency Planning Learning Lab
Learners will be able to demonstrate family engagement skills when permanency planning with caregivers.
Quality Contacts
Learners will be able to describe the core components of quality contacts.
Learners will be able to identify the characteristics of quality contacts.
Learners will be able to describe the relationship between quality ongoing case contacts and child welfare outcomes.
Learners will be able to describe the steps to prepare for quality contacts.
Learners will be able to explain the importance of gathering and reviewing case information prior to contacts.
Learners will be able to create an appropriate agenda for a visit with a child or family.
Learners will be able to create time management strategies to prioritize quality contacts.
Learners will be able to identify scheduling considerations and how they impact quality visits.
Learners will be able to develop questions to engage children and families in assessment and case planning.
Learners will be able to assess information to determine relevance to the purpose of case contacts.
Learners will be able to describe strategies for facilitating quality contacts.
- Learners will be able to describe the components of a quality contact and how to document contacts to monitor for safety considerations and behavioral change.

Preparing for Permanency	
•	Learners will be able to describe different considerations to prepare children, parents, and resource families based on the type of permanency
•	Learners will be able to assess emotional and relational permanency and develop plans to enhance them when they are diminished for youth in out-of-home care.
•	Learners will be able to demonstrate engagement activities that will help youth to identify important connections that they would like to maintain after they transition to adulthood.
•	Learners will be able to negotiate ongoing contact plans with important connections for youth who are transitioning to adulthood.
•	Learners will be able to create plans that outline specific preparation strategies for different case participants based on the type of permanency.
•	Learners will be able to describe the stages of grief and identify behavioral indicators of each stage.
•	Learners will be able to identify indicators of separation, grief, and loss prior to permanency and provide support to assist in the coping process.
Engaging Relatives	
•	Learners will be able to explain the importance of applying family-centered practices and principles to engage relatives.
•	Learners will be able to evaluate a relative's capacity to provide support by disproving myths associated with extended family of those involved in child protective services.

Day Five Agenda

Permanency Planning Services Track Training

- I. Welcome and Introductions

Authentically Engaging Children and Youth

- II. Caseworker Responsibilities with Children and Youth

Permanency Planning with Families, continued

- III. Concurrent Planning

BREAK

- IV. Implementing

- V. Service Provision

Family-Centered Permanency Planning Learning Lab

- VI. Child and Family Team Meetings

- VII. Case Planning with Families

LUNCH

Quality Contacts

- VIII. Importance of Quality Contacts

Permanency Planning Contact Record

- IX. Quality Contact Visits

BREAK

Preparing for Permanency

- X. Preparing for Permanency

- XI. Loss and Grief

Preparing for Permanence

- XII. Older Youth

Engaging Relatives

- XIII. Engaging Relatives

End-of-Day Reflection

Permanency Planning Services Track Training Day Five

Authentically Engaging Children and Youth

Caseworker Responsibilities with Children and Youth

Video: North Carolina Child Welfare Lived Experiences: The Youth Perspective

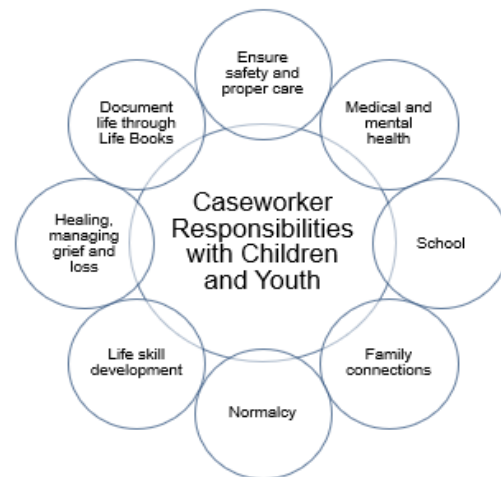
Video: North Carolina Child Welfare Lived Experiences: The Youth Perspective

- It is crucial that caseworkers engage with children and youth to understand their perspectives, feelings, and experiences

Notes

Caseworker Responsibilities with Children and Youth

- Caseworkers have many responsibilities for children and youth
- Each responsibility requires knowing the child, not just the case
- Youth needs should guide casework actions
- Responsibilities connect to safety, permanency, and well-being
- Caseworkers do this work through engagement, advocacy, and coordination



Notes

Activity: Caseworker Responsibilities**What to Do:**

- Each group will be assigned a responsibility topic
 - Ensure safety and proper care
 - Assess and attend to medical and mental health needs, such as making referrals to specialists as needed
 - Meet the child or youth's school needs
 - Support their family connections
 - Support normalcy by making sure that placement providers adhere to the RPPS requirements
 - Work with the child or youth to develop the life skills that are needed for a successful transition to adulthood
 - Manage grief and loss by supporting healing
 - Document their life through Life Books
- Explore the discussion questions with your group, specific to your assigned responsibility
- Work with your small group to complete the worksheet about your assigned caseworker responsibilities
- Be prepared to share the following with the large group:
 - One key factor
 - One action
 - One partner or support

Your group's assigned responsibility

--

Group Discussion Questions**What would you need to know about the child or youth?**

--

What casework action would you take?

Who else should be involved?

Activity Worksheet: Caseworker Responsibilities

Your group's assigned responsibility

Key Factors for this Responsibility:

Casework Actions to be taken to support this Responsibility:

Partners and Supports for the Casework Responsibility:

Activity Discussion Questions

What did the activity show about how much caseworkers need to know about each child or youth?

How does understanding these responsibilities support permanency, safety, and well-being?

Permanency for Special Populations



- Youth perspectives are essential to effective permanency planning
- Special populations require individualized, responsive engagement
- Authentic curiosity and relationship-building help caseworkers understand and meet youth needs

How might a youth's perspective change the direction of a permanency plan or case decision?

Tasks with Special Populations

Activity: Tasks with Special Populations

What to do:

- Each person will receive a card from the training facilitator
- Each card holds different pieces of information
 - One's (caseworkers) need to engage the youth to understand their experiences and perspectives
 - Two's (Youth) have experiences and perspectives that impact the outcome of their case and how the caseworker performs their duties
- Underlined information may be shared with others, while the information that is not underlined is not shared
- In the upper right-hand corner of their card, there is an icon
- Find the icon that matches you and pair up
- Spend 5 minutes having a conversation using the underlined information
- When time is up, share information previously withheld from their partner and discuss if they each met their goal

Pairs Discussion Questions

What are some considerations for this special population?

How does this impact the way in which you work with a youth from this special population?

How else would you gather other perspectives in this situation? Consider learned, vicarious, and formal knowledge

Learned knowledge

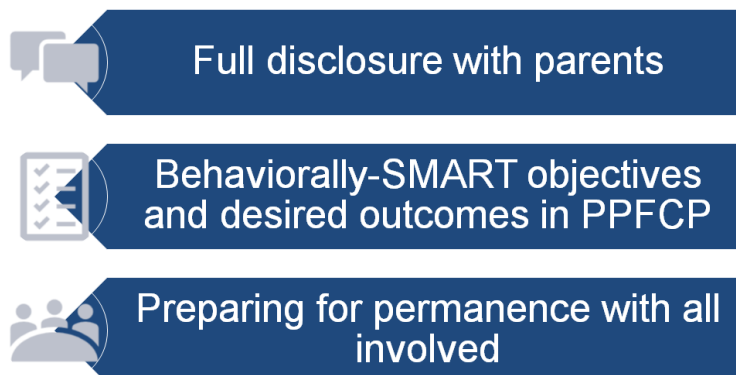
Vicarious knowledge

Formal knowledge

Permanency Planning with Families, continued

Concurrent Planning

Concurrent Planning Complexity



- Concurrent planning is the process of working towards a primary permanent plan of reunification, while developing at least one alternative, or secondary, permanent plan at the same time

- Concurrent planning is required unless the court eliminates reunification as one of the permanency plans
- Concurrent planning requires diligent efforts and planning on the PPFCP
- Working two plans at the same time can feel difficult and contradictory for families, requiring intentionality, clarity, and strong communication
- Preparation for permanence begins as soon as the case transfers to Permanency Planning Services and must involve children, families, relatives, and permanency resources

How might this impact your case planning process with families?

How might this impact your relationship with children, families, and permanence resources?

Concurrent Planning Practice

Consider the assigned concurrent permanent plan

“State your path” by planning a crucial conversation with parent about concurrent planning when reunification is the primary plan.

“Explore other's perspectives” through a role play crucial conversation with parent

- Concurrent planning requires full disclosure and many crucial conversations throughout the permanency planning process
- It can be challenging to discuss and plan for the concurrent plan when reunification is the identified primary plan, as it may feel contradictory to parents and members of the support network
- Concurrent planning is no longer required when the court eliminates reunification as a permanent plan

Notes

Activity: Crucial Conversations About Concurrent Planning

What to do:

- The training facilitator will form three groups and assign a concurrent plan to each:
 - Adoption
 - Guardianship or Custody
 - APPLA
- Each group will work together for five minutes to develop a plan to “state the path” in a conversation with a parent who hopes to reunify with their child
 - Focus on the need to pursue tasks and activities that promote the assigned concurrent plan
- When time is up, you will form pairs
- With your partner, role-play a crucial conversation with the parent:
 - Introduce the assigned concurrent plan
 - Explore the parent’s perspective
 - Listen actively to the parent’s experience of hearing about the concurrent plan

Activity Worksheet: Crucial Conversations about Concurrent Planning

Assigned Concurrent Plan: _____**How to “State the Path” for the concurrent plan:****Tasks and Activities that will promote the concurrent plan:**

Activity Discussion Questions

What was it like to consider intentional conversations with parents about concurrent plans?

What challenges might you face when intentionally discussing concurrent case planning with parents?

What is one thing you will remember to do in your conversations with parents?

Implementing

Implementing Core Activities



- Implementing is defined as carrying out plans that have been developed and includes linking families to services and community supports
- The three implementing core activities include:
 - Supporting families to take actions agreed upon in the plan and connecting families to services and community support,
 - Collaborating with providers and informal supports in the community to help families achieve desired outcomes, and
 - Coaching with families and partnering with providers to assure plans are being implemented, progress is made, and outcomes are achieved
- Caseworkers need to spend a significant amount of time supporting families, as well as coaching and partnering with families, family support, and service providers
- Working with families to find solutions to challenges means that you take the time to explain what services are and the benefits to the family

Notes

Service Provision

Services Are Not Safety

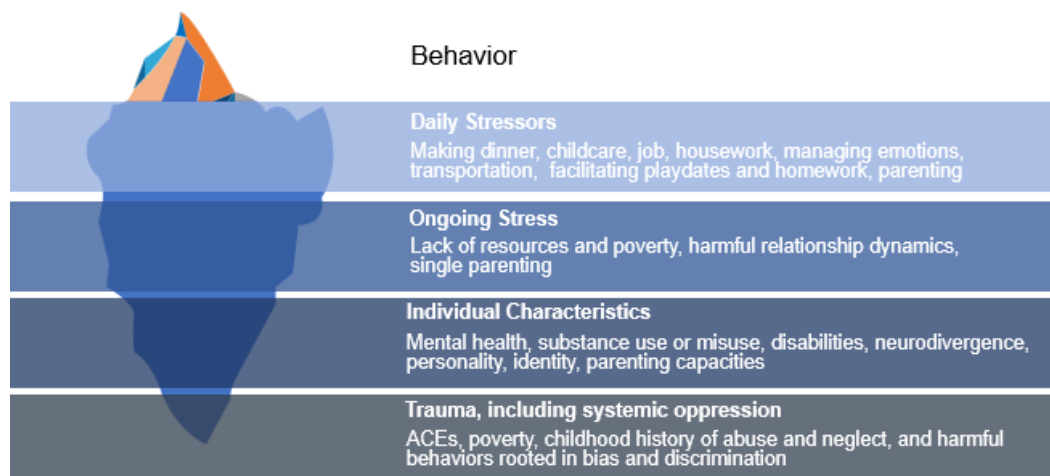


- A foundational principle of Safety-Organized Practice is that services and safety are not the same thing
- Families who demonstrate consistent and sustained change over time demonstrate safety
- Safety plans are built to immediately change the child's environment to protect them from identified danger while the underlying issues are still being assessed
- When behavioral change is the focus, opportunities to involve and engage families are created
- An important factor to consider is what stage of the change the individual has demonstrated with you

How does a person's readiness to change impact our assessment of safety and the ability to engage in safety planning to address immediate needs?

What do you need to improve your ability to assess someone's readiness to change?

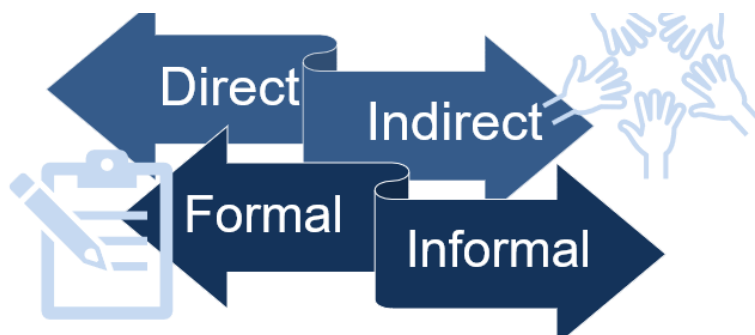
Customizing the Family Case Plan



- Behavior may signal unmet needs, stress, trauma, or barriers, so it's important to look beyond behavior
- Permanency Planning uses ongoing engagement to understand what is beneath the surface of behavior
- Safety is shown through sustained behavioral change
- The PFCP should address the need behind the behavior and the PFCP should address the need behind the behavior
- Use family voice and context to guide planning

How can looking beneath the behavior help you match services and supports more effectively?

Types of Services



- Effective service provision starts with engaging families as partners and recognizing that families know their strengths, family values, and social context best
- Every interaction is an opportunity to build a connection, and family engagement improves the quality and relevance of service planning
- When talking with families, it's important to distinguish between types of services and supports:
 - Formal vs. Informal supports
 - Licensed services vs. family, friends, community, faith-based supports
 - Direct vs. Indirect services
 - Services provided directly to the family vs. broader community or system-level supports
- Sustainable change often requires a mix of formal and informal, direct and indirect supports, not just referrals to programs

What questions should be considered before linking families with services?

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What difference does it make to child safety to have a supportive family or friend group?

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Empowering Families to Identify Service Provisions



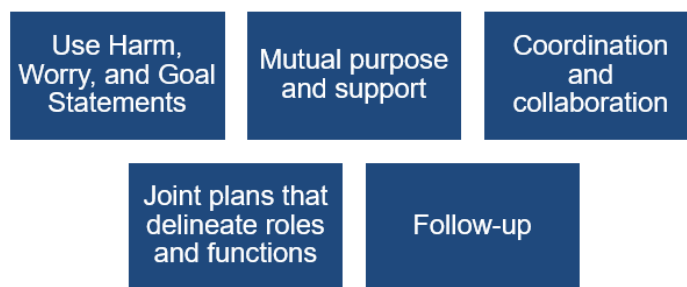
- Empowering families begins with the caseworker examining personal bias, language, and assumptions
- Empowering families continues through assessing whether the agency truly supports family voice and choice
 - Shared understanding throughout assessment, planning, and implementation
- Reinforce that families are most effectively engaged when service provision is collaborative and strengths-based
 - Approaches such as motivational interviewing, family decision-making, solution-focused practice, parent partner programs, and father involvement strategies
- Engaging families successfully often requires multiple strategies, not a single approach
- Evidence-informed practices that emphasize respect, empathy, non-judgmental listening, and shared problem-solving support stronger engagement and better outcomes during implementation

Think about a family you worked with that was highly engaged in services. What did you or others do that helped create that engagement?

What is one way you can increase family voice and choice during case planning or service matching?

When a family is reluctant to engage in services, what approaches have you found effective in maintaining partnership and shared decision-making?

Engaging Service Providers



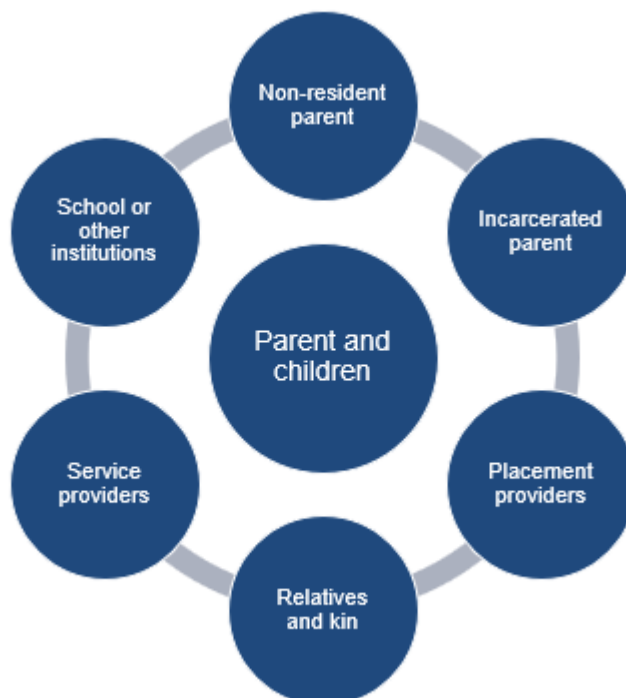
- Engaging providers well depends on the groundwork already done:
 - Engaging the family and supports
 - Understanding the family's goals and needs,
 - Matching services to the family's voice, choice, and values, and
 - Being prepared to advocate alongside the family, not for them
- It is important to:
 - Utilize harm, worry, and goal statements to promote shared understanding of what needs to happen
 - Re-anchoring difficult conversations in a shared purpose
 - Supporting the family and achieving safe reunification or permanency
 - Ongoing coordination, collaboration, and follow-up, including honoring commitments and maintaining regular communication as part of diligent efforts

Think about a provider partnership that worked well. What contributed to the success of that collaboration?

When you and a service provider have different perspectives about a family's progress, what helps move the conversation back to a shared purpose?

Family-Centered Permanency Planning Learning Lab

Child and Family Team Meetings



Activity: Child and Family Team Meeting Role-Play

What to do:

- Volunteers will role-play a CFT Meeting
- Use the Activity Worksheet to support your role if you are a volunteer

What is one word that you would use to describe how you felt during this activity?

Activity Worksheet: Child and Family Team Meeting Role-Play

Assigned Role: _____

Draft a statement that the person you have been assigned might say during a CFT meeting

Activity Discussion Questions

What did this activity reveal about what children and families may experience during a CFT meeting?

What factors help ensure important perspectives are heard and understood during a CFT meeting?

Based on this activity, what is one thing you will do differently when facilitating or participating in a CFT meeting?

Honoring All Perspectives

Activity: Honoring All Perspectives

What to do:

- If the class is large enough, each CFT volunteer from the last activity will find two partners who did not volunteer (otherwise, groups of three will be formed)
- There will be three rounds of sharing
- Each round will be two minutes for listeners to practice validating feelings and honoring perspectives
- In each two-minute round:
 - Sharers read their statement to the two listeners
 - Listeners validate the sharer's emotions and honor their perspective
 - Listeners are not to provide feedback or critique the sharer's statement in any way
 - Sharers can give feedback about whether they feel validated or heard
 - Listeners can try again if their first attempt doesn't land

Notes

Case Planning with Families

PPFCP: Find & Fix the Flaws

Activity: Find & Fix the Flaws in the PPFCP

What to do:

- Access the PPFCP instructions (PATH NC DSS-5240ins) on the state website
- Review the INTENTIONALLY INCORRECT Lewis family PPFCP
- Spend seven minutes finding the flaws in the Lewis Family PPFCP
- For this activity, the Lewis Family PPFCP has only 5 sections:
 - Family Information
 - Family Strengths and Supports
 - Reasonable Efforts to Prevent Removal
 - Objectives & Behavior Changes to Address Identified Need and Barriers
 - Objectives to Address Barriers to Identified Permanency Plans
- Be prepared to share what flaws you found
- Use the “Fix the Flaws” activity worksheet and the Harm, Worry, and Goal Statements created earlier in this training to rewrite two sections:
 - Objectives & Behavior Changes to Address Identified Need and Barriers
 - Objectives to Address Barriers to Identified Permanency Plans
- ^o Use the SMART approach when writing the objectives and describing behavior changes
 - S= Specific
 - M= Measurable
 - A= Achievable
 - R= Relevant
 - T= Timebound
- When time is up, find a partner and review each other’s work

Notes

Handout: Lewis Family PPFCP

PERMANENCY PLANNING FAMILY CASE PLAN

County: County

Case Number: 123-456

Purpose: ☒ Initial Case Plan ☐ Case Plan Update

Date: 32 days after placement

Family Information

Case Name: Monica Lewis	
Agency Worker Name, Phone Number & Email	Sam Worker, 777-888-9999, sworker@county.org
Agency Supervisor Name Phone Number & Email	Sawyer Super, 777-888-9999, ssuper@county.org

Name (First, Last)	DOB/Age mm/dd/yy	Date of Custody (mm/dd/yy)	Living Arrangement Type	Primary Permanency Plan	Secondary Permanency Plan
Youth: Vanessa Jackson	10 / 06 / yrs	/ /	Licensed Foster Home	Reunification	Guardianship with a Relative
Youth: Raymond Jackson	06 / 14 / yrs	/ /	Licensed Foster Home	Reunification	Guardianship with a Relative
Youth:	/ /	/ /			
Youth:	/ /	/ /			
Youth:	/ /	/ /			

Parent/Caretaker Information	Any updates to parent/caretakers contact information (address, phone number, email)?
Parent Name: Monica Lewis Parent of:	☐ Y ☒ N If yes, caseworker update parent contact information in PATH NC.
Other Respondent (Caretaker): Respondent (Caretaker) of:	☐ Y ☒ N If yes, caseworker update respondent/caretaker contact information in PATH NC.

Parent/Caretaker Information	Any updates to parent/caretakers contact information (address, phone number, email)?
Parent Name: George Parent of: Jackson-Bailey	☐ Y ☒ N If yes, caseworker update parent contact information in PATH NC.
Other Respondent (Caretaker): Respondent (Caretaker) of:	☐ Y ☒ N If yes, caseworker update respondent/caretaker contact information in PATH NC.

Name	Phone Number	Email
Guardian ad Litem (for child): Betsy Burch	562-555-2222	bburgin@GAL.com
Guardian ad Litem (for parent, if applicable):		
Attorney for Parent: Aly McBeal	365-856-6597	aliv@mcbeal.com
Attorney for Parent: Ben Matlock		bmatlock@matlock.com

DSS-5240 PATH NC (Rev. 05/2026)
Child Welfare Services

PERMANENCY PLANNING FAMILY CASE PLAN

Family Strengths and Supports

Identified strengths of the parents/caretaker from the Family Strengths and Needs Assessment (FSNA):

- SN1. Emotional/Mental Health
- CSN2. Social Relationships and Skills
- CSN3. Relationship with Caretakers

Identify natural supports and their involvement with the family and any other strengths not captured on the FSNA:

Ms. Rosa (neighbor), Michelle Boyd (maternal aunt), Samantha Warren (Van's best friend's mom), and William Bailey-Jackson (stepdad).

Reasonable Efforts

Description of the services offered and provided to prevent removal of the child from the home (reasonable efforts to achieve the goals of the permanency plan must be outlined in the parent and child(s) case plan):

Safety planning with the family, provided information about child behaviors and coaching around non-physical discipline techniques to George and William, efforts made to secure a Temporary Placement Provider

Priority Needs from most recent Caretaker SNA:

SN2 Caretaking Skills and Practices, SN11 Challenging Child Characteristics

Priority Needs from most recent Child SNA:

CSN1 Family of Origin relationships, CSN5 Emotional/Behavioral Health, CSN8 Life Skills

PERMANENCY PLANNING FAMILY CASE PLAN
Objectives and Behavior Changes to Address Identified Needs

Who the need pertains to: George Jackson-Bailey

This objective is to accomplish the ☒ **Primary Plan - Reunification** ☐ **Secondary Plan - Guardianship**

Need (from FSNA or CSNA)	Describe behaviors of concern:	Objective/Desired Outcome: (How will we know if the worry is resolved? Identify behavioral change goal.)
To which child(ren) does this need apply? <u>Raymond and Vanessa</u>	George abuses Raymond	
(What already happened?) George abused Raymond. Raymond was injured.	(What we worry will happen next?) If George doesn't stop spanking Raymond, Raymond is going to get really hurt.	George will stop hitting Raymond.

Activities Related to Identified Needs:			
Service(s) to be offered or provided to address the above need:	Who is the service for?	Responsible person(s)	Date Referral or Resource Made
Parenting classes and therapy	George and William	George	one week after plan created
			six months

Progress Achieving the Objective/Desired Outcome:	
Behavior Change status: ☐ Achieved in full ☐ Partially achieved ☐ Not Achieved ☐ No longer needed	Service status: Was the service(s) made available by the agency? ☐ Y ☐ N Has the family participated in services provided? ☐ Y ☐ N Have any of the services been completed? ☐ Y ☐ N Have services been added or discontinued? ☐ Y ☐ N
Date: _____ Comments: _____	

PERMANENCY PLANNING FAMILY CASE PLAN
Objectives and Behavior Changes to Address Identified Needs

Who the need pertains to: George Jackson-Bailey

This objective is to accomplish the ☒ **Primary Plan -** Reunification ☐ **Secondary Plan -** Guardianship

Need (from FSNA or CSNA)	Describe behaviors of concern:	Objective/Desired Outcome: (How will we know if the worry is resolved? Identify behavioral change goal.)
To which child(ren) does this need apply? <u>Raymond</u>	Raymond has ADHD and George doesn't know how to handle his behaviors	
(What already happened?) George abuses Raymond when Raymond doesn't do his chores, forgets things, or his ADHD is out of control	(What we worry will happen next?) Raymond will keep forgetting to do things, not doing his chores, and his ADHD will get worse.	Raymond will do his chores. George will know how to handle Raymond.

Activities Related to Identified Needs:			
Service(s) to be offered or provided to address the above need:	Who is the service for?	Responsible person(s)	Date Referral or Resource Made
Raymond will have an ADHD evaluation and get on better medication.	Raymond	George	one month after plan created
			six months

Progress Achieving the Objective/Desired Outcome:		Date:
Behavior Change status:	Service status:	Comments:
☐ Achieved in full	Was the service(s) made available by the agency? ☐ Y ☐ N	
☐ Partially achieved	Has the family participated in services provided? ☐ Y ☐ N	
☐ Not Achieved	Have any of the services been completed? ☐ Y ☐ N	
☐ No longer needed	Have services been added or discontinued? ☐ Y ☐ N	

PERMANENCY PLANNING FAMILY CASE PLAN

Objectives to Address Barriers to Identified Permanency Plans

To which child(ren) does this barrier apply? Raymond and Vanessa

This objective is to accomplish the ☒ **Primary Plan** - Reunification

☐ **Secondary Plan** - Guardianship

Identify the barrier to achieving the permanency plan: Monica is in jail and will not get out for another 3 years. She has not been visiting with the children.

Activities Related to Identified Barriers:				
Service(s) to be offered or provided to address the above need:	Who is the service for?	Responsible person(s)	Date Referral or Resource Made	Projected Service Completion Date
Substance Use Assessment Visits with the children	Monica	Monica	one week after plan created	six months
	Monica, Raymond, Van	Monica		
Updates:				
		Comments:		

PERMANENCY PLANNING FAMILY CASE PLAN

Objectives to Address Barriers to Identified Permanency Plans

To which child(ren) does this barrier apply? Raymond and Vanessa

This objective is to accomplish the ☐ Primary Plan - Reunification

☒ Secondary Plan - Guardianship

Identify the barrier to achieving the permanency plan: Relative to assume guardianship has not been identified

Activities Related to Identified Barriers:				
Service(s) to be offered or provided to address the above need:	Who is the service for?	Responsible person(s)	Date Referral or Resource Made	Projected Service Completion Date
Parents will provide a list of relatives	Raymond and Van	George	n/a	six months
Updates:				
Comments:				

Activity Worksheet: Fix the Flaws in the Lewis Family PPFCP

Rewrite the PPFCP Sections using a SMART approach:

Objectives & Behavior Changes to Address Identified Need and Barriers

Objectives to Address Barriers to Identified Permanency Plans

Pair & Share SMART Worksheet: Checking your partner's work

Use the SMART approach to help your partner check their work:

How is it Specific?

How is it Measurable?

How is it Achievable?

How is it Relevant?

How is it Time-bound?

Quality Contacts

Importance of Quality Caseworker Contacts

Importance of Quality Contacts

Purposeful interaction between caseworkers and children, youth, parents, and resource parents that reflect engagement and contribute to assessment and case planning processes.

- Purposeful interaction during contacts reflects engagement and contributes to assessment and case planning processes
- Ongoing quality contact is key to many of the essential functions of child welfare practice that promote safety, permanency, and well-being

Describe what quality implies when we talk about quality contacts?

Contacts Policy Requirements

	Initial Contacts	Ongoing Contacts
Child	• Within 7 days of placement • Within 7 days of any subsequent placements	• Face-to-face contact monthly • Majority in the residence • More frequent contact as indicated by the child's needs
Parents	• Within 7 days of initial placement	• Monthly • Half of the contacts in the parent's home
Placement Provider	• Within 7 days of placement	• At least one provider monthly • All providers quarterly • Assess the home quarterly

- Reinforce that the outlined timelines and frequencies, initial and ongoing contacts, are minimum standards
- Caseworkers must increase the frequency of contact when a child's or family's needs, transitions, or safety concerns indicate it
- Highlight that requirements differ for children, parents, and placement providers, and that each contact must be intentional, focused on assessment, engagement, progress toward case goals, and safety, not just compliance
- Emphasize the importance of documenting required contacts, collateral contacts, and any delays or barriers, including the rational and diligent efforts made, and link this directly to accountability, supervision, and court expectations

Notes

Collateral Contacts

Who and when?

- Significant knowledge
- Monthly contact

Holds pieces to a family's puzzle

Creates a deeper understanding

Documentation and diligent efforts



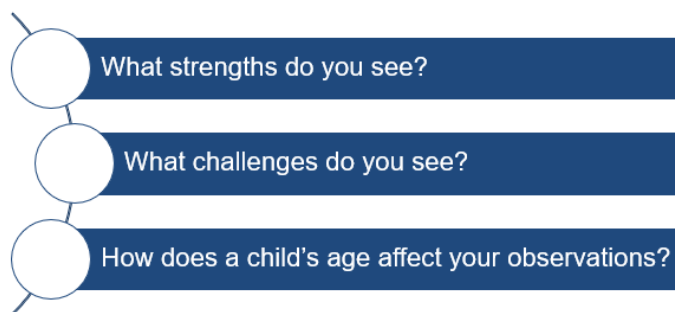
- Collateral contacts provide critical, multi-perspective information
- Collateral contacts are individuals with significant knowledge of the child and family and are essential for assessing safety, risk, progress, and barriers over the life of the case
- Caseworkers must exercise discretion when selecting collaterals to protect confidentiality, advise parents of professional collaterals being contacted, and seek permission whenever required, using engagement and relationship-building to explain the purpose and benefit of collateral involvement
- Collateral contacts must be documented clearly, including who was contacted, when, observations related to safety and case progress, and any attempts or delays
- Collateral contacts are part of diligent efforts and help workers assess behavioral change, safety, and progress toward permanency goals, not just gather information

Think about a case where a collateral contact changed or significantly strengthened your understanding of a family's situation. What did you learn?

How do collateral contacts help you determine whether behavioral change is occurring outside of your direct observation?

When collateral contacts are difficult to obtain, what diligent efforts can you make to gather the information needed to support sound decision-making?

Assessing Safety During Home Visits



- Home visits are an opportunity to assess safety, risk, well-being, and behavioral change over time, not simply observe
- Assessments should focus on how observed conditions relate to the family's identified needs, case plan goals, and protective capacities
- Safety indicators look different depending on the child's age, developmental stage, and individual needs
- Full disclosure builds trust by helping families understand what is being assessed and why
- Observations should inform ongoing decisions about safety, permanency, and next steps in the PPFCP

What observations during a home visit might indicate progress toward a family's identified case plan goals?

What observations during a home visit might indicate progress toward a family's identified case plan goals?

How can full disclosure during a home visit improve family engagement and assessment quality?

Permanency Planning Contact Record

Contact Record

The Permanency Planning monthly contact record is not a checklist; it's an engagement tool!

- The Permanency Planning monthly contact record supports quality contacts by guiding assessment, engagement, follow-up, and documentation
- The tool helps workers explore safety, well-being, relationships, education, health, normalcy, and permanency
- The Contact Record is an engagement tool, not a checklist. Questions should promote conversation and understanding
- Quality responses gathered through the Contact Record contribute to ongoing assessment and decision-making

Notes

Activity: Performing and Documenting Contacts

What to do:

- Review the North Carolina Monthly Permanency Planning Contact Record on the state website
- Each group will be assigned 2-3 sections from the contact record
- Circle the sections that your group has been assigned
- Create engaging questions or statements that allow for a conversation about the topic, rather than a "Yes/No" checklist

Activity Worksheet: Performing and Documenting Contacts

Circle your group's assigned contact record sections:

- Changes in the household
- Relationships between the child and the placement provider(s)
- Social support and respite
- Services and training
- Shared Parenting
- Physical and mental health needs of placement provider(s) and other members of the household
- Relationship with the agency, court process, child's plan, upcoming events
- Safety and supervision in the placement
- Child behaviors
- Schooling/education of the child
- Physical, dental, and mental health needs of the child
- Child's medications
- Child's access to and participation in age- or developmentally-appropriate activities.
- Maintaining connections
- Lifebooks

Scenario: Imagine you are meeting with a 14-year-old youth and their placement provider.

Contact Record Topic: _____

Checklist Item: _____

Engaging Questions or Statements

Contact Record Topic: _____

Checklist Item: _____

Engaging Questions or Statements

Contact Record Topic: _____

Checklist Item: _____

Engaging Questions or Statements

Quality Contact Visits

What Do Quality Contacts Accomplish?

Quality Contacts Outcomes		
Know • Facts • Safety • Progress	Understand • Perspectives • Strengths • Barriers	Act • Plan • Advocate • Follow-Up

- Quality contacts strengthen relationships and engagement with children, parents, and placement providers
- Quality contacts help caseworkers gather information needed to assess safety, well-being, behavioral change, and progress toward permanency goals
- Quality contacts support better decision-making by providing a fuller understanding of family strengths, challenges, protective capacities, and service effectiveness
- Quality contacts should lead to purposeful follow-up actions, adjustments to planning, and improved outcomes for children and families

Notes

Activity: What Should Quality Contacts Accomplish?

What to do:

- Each group will be assigned a category:
 - Child
 - Parent
 - Placement provider
- Write a title on the flipchart paper, “After a Quality Contact, I should:”
- Make three columns on their flipchart paper,
 - Know
 - Understand
 - Be prepared to do next
- Create lists in each column for your group’s assigned category
- Be prepared to share your answers with the larger group

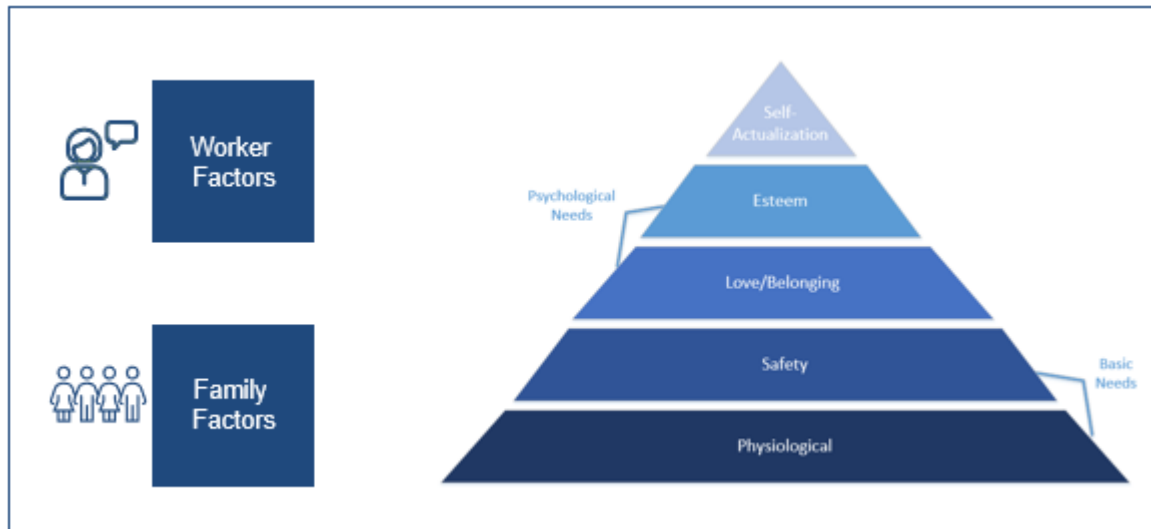
Activity Worksheet: What Should Quality Contacts Accomplish?

Assigned Category: _____

After a Quality Contact, I should:

Know	Understand	Be prepared to do next

Factors that Affect Quality Contacts



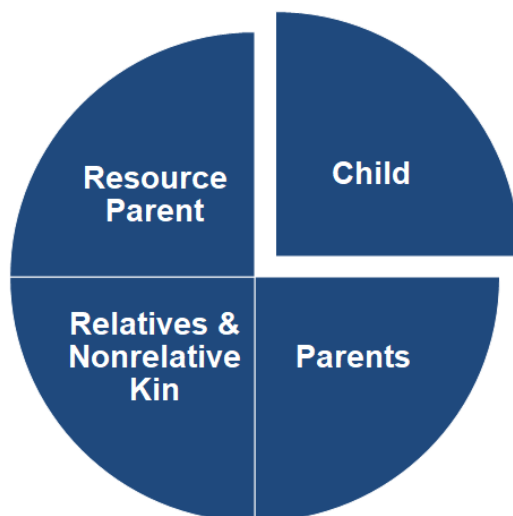
- External factors may impact the quality of a home visit, such as access to food, water, or transportation, weather conditions, extreme weather events, or health and medical conditions
- External factors that impact contact quality may apply to the family, collateral contacts, or the caseworker

Other than basic needs, what else might affect the visit?

Notes

Preparing for Permanence

Preparing for Permanence

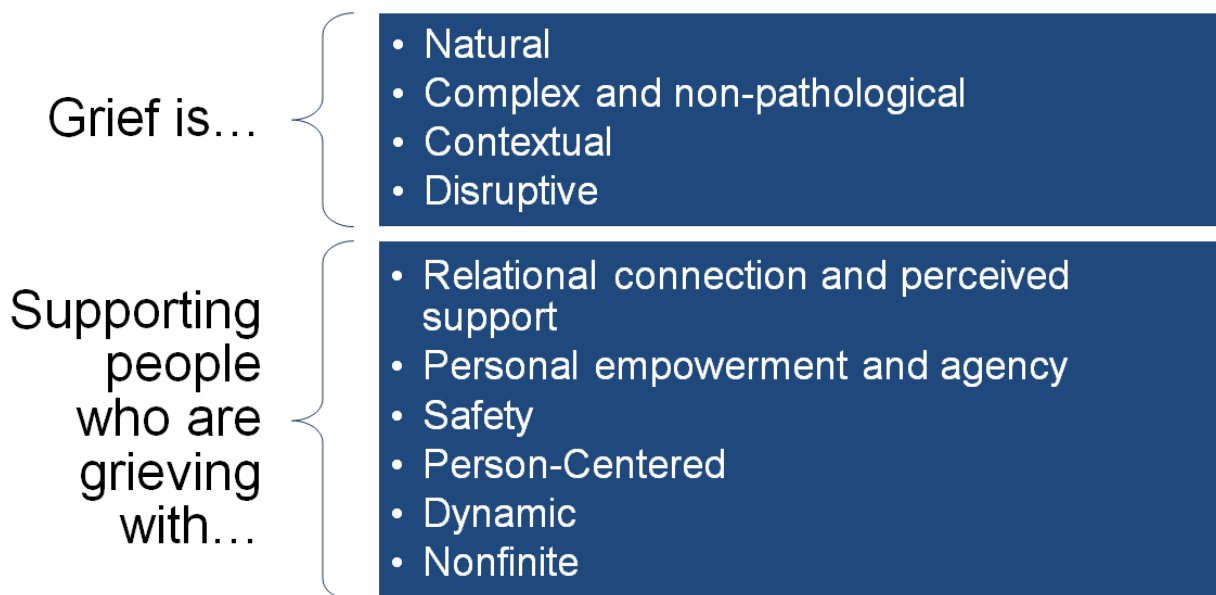


- Preparation for permanence:
 - Begins when a child enters care
 - Occurs throughout the life of the case
 - Involves preparing children, parents, relatives/kin, and permanency resources for the emotional, relational, and practical transitions associated with permanency
- Every interaction, including family time, shared parenting, quality contacts, Child and Family Team meetings, case planning, and concurrent planning, helps prepare children and families for permanence

Think about a child or family you have worked with. What helped prepare them for a major permanency transition, and what additional support might have been helpful?

Loss and Grief

Ten Core Principles of Grief-Informed Care



- Grief is a natural, complex, and lifelong experience, not a disorder
- Grief looks different for everyone, can affect emotional, physical, spiritual, and relational well-being, and should be understood within personal, ethnic, and contextual experiences rather than pathologized
- Grief-informed care moves from understanding to action
- Being grief-informed means not only knowing how grief shows up, but intentionally responding in ways that prioritize relational connection, safety, empowerment, person-centered support, and flexibility over time

Notes

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Activity: Grief-Informed Care

What to do:

- Review the “#UnderstandGrief” handout
- Form a small group and discuss the ten principles of Grief-Informed Care

Group Discussion Notes

Handout: #UnderstandGrief

#UnderstandGrief

Being Grief-Informed: From Understanding to Action

Donna L. Schuurman, EdD, FT & Monique B. Mitchell, PhD, FT

Grief is a natural response to loss. How people grieve privately or publicly varies and is based on many factors, including their personality and what their social context has shown, taught, or demonstrated as “appropriate.” A dominant attitude in “mainstream” society is that grief is an individual emotional experience which has predictable stages and a defined timeline. Defining grief this way suggests that if your “symptoms” last too long, or are too intense, you may have a “mental disorder” needing treatment. And this is problematic.

Everyone responds to grief in a unique way and grief can last a lifetime...and that is completely normal. This doesn't mean grieving is easy or that people won't experience emotional, physical, spiritual, and/or relational challenges. Rather than label people “disordered” or “dysfunctional,” we need to understand the holistic nature of grief. To be grief-informed not only means having knowledge about grief, it also means knowing how to put this understanding into action.

10 CORE PRINCIPLES OF BEING GRIEF-INFORMED

To become grief-informed begins with the initial step of identifying and embracing ten core principles about grief. These core principles involve recognizing what grief is and best practices for supporting people who are grieving.

 **Natural.** Loss is a normal, inevitable, and universal human experience. People have an innate capacity to adapt to loss and function healthily.

 **Complex and Nonpathological.** Grief is an adaptive, nonpathological response to loss. Grief is complex and complicated because people and relationships are complex and complicated.

 **Contextual.** Grief is not solely an individual experience; grief is interwoven in a sociocultural context, influenced by family, community, and other social systems. Acknowledging and addressing the sociocultural and historical factors that impact grief can reduce disparities and promote equity and inclusion.

 **Disruptive.** Grief challenges our identity, relationships, beliefs, and assumptions about the world and our role in it.



Relational Connection and Perceived Support.

Having people who care and support us after a loss helps us navigate the changes in our lives. Feeling heard and having people to share with helps us know we're not alone in our grief.



Personal Empowerment and Agency. Experiencing loss and grief can make us feel helpless or out of control. Choosing our own healthy responses, rather than what others tell us to do or not do, can help us regain a sense of balance and person “agency.”



Safety. Experiencing loss challenges our sense of safety in the world. Paying attention to our physical, emotional, and spiritual needs will help us cope with all the changes that happen after a loss.



Person-centered. The intensity and experience of grief are unique for every individual.



Dynamic. The dynamic nature of grief cannot be fully captured by stage, phase, or other prescriptive models. There are no universally acceptable or “correct” ways to grieve.



Nonfinite. Loss is interwoven into our identity; therefore, grieving is not a finite experience. Grief doesn't have some magical end point. We can grieve someone throughout our lives.

While knowledge of the ten core principles is a critical first step to becoming grief-informed, we must recognize that knowledge is most impactful when it is put into action. It is time that we as a nation take a stand and acknowledge grief for what it truly is: a natural and normal response to loss that is interwoven into a sociocultural context. Grief is not an experience that needs to be “silenced,” “treated,” or “pathologized.” Grief, and all the many complications it imposes on the griever, is an experience that needs and deserves understanding, support, and community. Here are 10 action steps to implementing grief-informed knowledge.

continued...

This is a condensed version of a longer document. For the full position paper, please visit: www.dougy.org/grief_informed

CALL TO ACTION

- 1. Advocate that grief is not a mental disorder; our social and cultural context impacts how we grieve.** We are impacted by the people in our lives and the world in which we live. As you listen to or read about how grief is an individual experience (i.e., grief happens in isolation of the world around us), question the narrative of "mental disorders" and consider all the factors that can contribute to how a person responds to the death of someone in their lives.
- 2. Consider the language you use and how it can impact people.** The language we use to describe people and experiences shapes how we view and respond to them. When it comes to grief and grieving, we have the potential to be helpful or harmful. People who are grieving often receive patronizing responses to "move on" or "find closure" when what they need most is to feel understood.
- 3. Educate others about being grief-informed.** Share the 10 core principles of being grief-informed with your friends, family, coworkers, and others who want to know how to support people who are grieving. If or when you notice someone is misinformed or misrepresenting grief, respond! For example, if you don't agree with what is portrayed in the news or media, write a letter to the editor, contact a reporter... weigh in with your opinion and experience.
- 4. Broaden the dialogue about the need for diversity and inclusivity in grief research and support.** Many of the studies in the field of thanatology (the study of death, dying, bereavement, and loss) in the U.S. are based on studies of adults in "mainstream" culture, and have been used to represent the "standard" of how people grieve and how to support them. We need to reach beyond these limited and narrow perspectives to understand and support how grief is experienced by people of different beliefs, cultures, ethnicities, backgrounds, abilities, and experiences.
- 5. Challenge myths about grief.** Grief doesn't follow an orderly path of stages, tasks, or assignments to complete. When someone is grieving, don't impose expectations on them about how they should feel or respond, or how long their grief should last. Every experience of loss is different and how people feel or respond to loss will be influenced by their relationship with the person who died, their beliefs, experience, social support, and many other factors.
- 6. Acknowledge and address the injustices of labels.** Does yearning for someone who died mean that someone has a mental disorder (e.g., "Prolonged Grief Disorder")? Rather than labeling people who are grieving with a mental disorder, or permitting others to label us, consider framing the challenges we face when we're grieving as just that: challenges we experience when coping with the death of someone in our lives.
- 7. Recognize and acknowledge that every experience of loss is a unique experience.** People will likely respond to the death of each person in their life differently because every relationship is unique. Let's not assign people who are already struggling into preconceived and stereotypical boxes.
- 8. Strengthen relational connections.** Our mainstream society values independence and, as such, the challenges experienced when grieving are often viewed as occurring "within the individual." Unfortunately, this unrealistic position underestimates, and may even ignore, the value of interpersonal support when someone is grieving. We need connections with others who are understanding and compassionate, especially when difficult and painful things happen.
- 9. Honor lived experience.** There are as many ways to grieve as there are people in the world, and there's no "right way" or "wrong way." It's important to know how to support others, even when their lived experience and grieving responses differ from our own. When we place expectations and judgments on others because they are different from us, it can create barriers rather than relational connection and perceived support. To honor the lived experience of others involves offering the gift of nonjudgmental listening, open mindedness, and support.
- 10. Be compassionate with yourself and with others.** Oscar Wilde famously stated that "only the shallow know themselves," suggesting that there's always more to learn about ourselves and others, no matter our age, education, or social status. One of the ways we can "walk our talk" is to demonstrate the same compassion toward ourselves that we hope others will have for themselves, particularly when we're grieving.



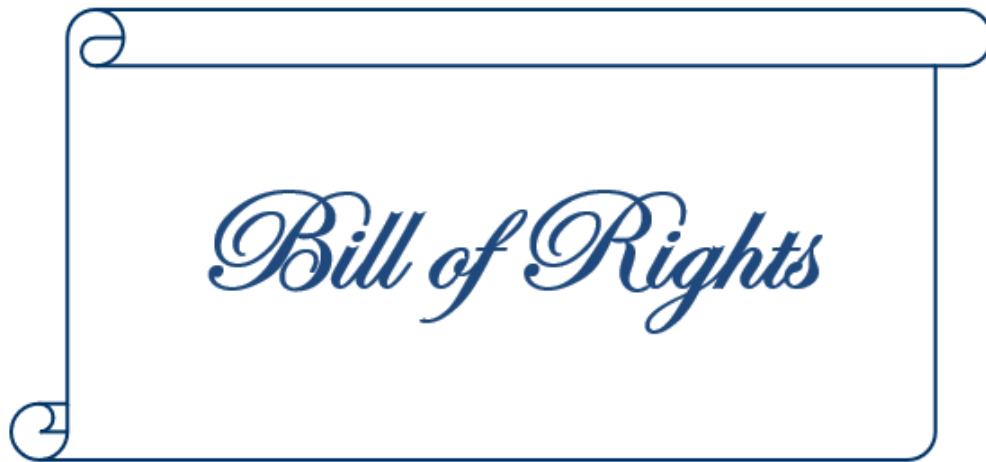
The National Grief Center
for Children & Families

Join this national call to action!

Let us know what you and/or your organization are doing to raise national consciousness on being grief informed. We'd love to hear from you! On social media use #UnderstandGrief and tag us at @thedougycenrer. Go to doug.org/UnderstandGrief for more.



The Bill of Rights for Youth in Foster Care Who are Grieving



What other best practices did you see reflected in these rights?

What challenges might you face when it comes to ensuring the rights of youth in foster care?

How might you navigate those challenges?

Handout: Bill of Rights for Youth in Foster Care Who are Grieving

Bill of Rights

Created by teens at Dougy Center for teens who are grieving

As grieving teens, we have the right to...

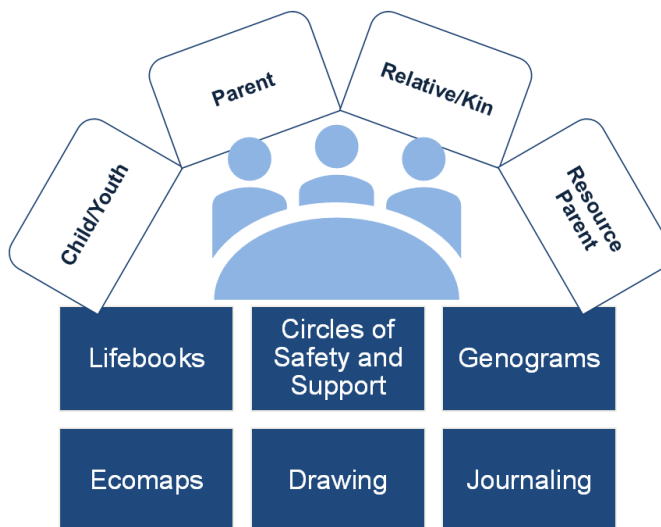
- Know the truth about the death, the person who died, and the circumstances surrounding the death
- Ask questions and have them answered honestly
- Be heard and listened to without receiving unsolicited advice
- Be silent and not share our thoughts and emotions out loud
- Disagree with your perceptions and conclusions
- See the person who died and the place where they died, if we choose to
- Grieve in our own ways — without hurting ourselves or others
- Feel all the feelings and to think all the thoughts of our own unique grief
- Not have to follow the “Stages of Grief” as outlined in a high school health book
- Be angry at death, the person who died, God, ourselves, and others
- Disagree with people who are insensitive especially those who spout clichés
- Have our own beliefs about life and death
- Be involved in the decisions about the rituals related to the death
- Have irrational guilt about what we could have done to prevent the death

#UnderstandGrief



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Preparing for Permanence



Activity: Preparing for Permanence

What to do:

- Around the room, you will see flipchart pages for three permanency outcomes:
 - Reunification
 - Adoption
 - Guardianship
- Share your thoughts about:
 - Identity and relationship factors that are important to the family
 - How would you prepare each person for each realm of permanency:
 - Legal
 - Relational
 - Identity
 - Describe the tools that you would use when working with each individual
 - How you would use these tools to support the conversation

What tool stands out for you as one that you would use most frequently?

--

Why did you choose that tool?

--

What tool feels challenging to you?

How might you approach an older youth about each permanency outcome?

What is important to consider when approaching an older youth from your perspective?

What tools might you use in approaching the youth?

Older Youth

Engaging Youth in Permanency Planning



- Older youth have unique permanency planning needs
- Permanency planning with older youth must be honest, direct, and transparent, actively inviting youth input, respecting their perspectives, and giving them a meaningful role in decisions that affect their future
- P.L. 113–183 reinforces the vital role of meaningful youth engagement in achieving permanency and underscores how it can lead to youth-centered practices that achieve better outcomes in all areas of child welfare; when agencies and courts select and approve APPLA as the permanency plan, the permanency provisions focus on including youth voice and engaging youth in the case planning process; courts are required to ask youth about their desired permanency goal when the child welfare agency seeks an APPLA plan; this engagement can provide insight into barriers to permanency as well as potential services and supports to overcome those barriers; in addition to the legal requirements for youth engagement in court and case planning, best practice recommends including youth in the work conducted to achieve permanency
- Youth need to understand the efforts and actions taken to find or reconnect them with family; when youth, agencies, and courts collaborate and develop “buy-in,” trust, and understanding, the chances for successful outcomes increase

Tips for engaging older youth:

- Help youth understand what family, belonging, and permanency mean
- Help youth explore their permanency options: what they want and why
- Recognize that family loyalties may affect youths’ desire to pursue permanency
- Encourage birth family connections
- Give youth a voice in permanency planning
- Be honest and direct with the youth you serve

Notes

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Activity: Engaging Youth in Permanency Planning**What to do:**

- Review the scenario and three potential responses
- Discuss the three responses with your partners or small group

Scenario:

Jeff is a 17-year-old who wants to live with his mother. His mother has struggled with substance use disorder and has not always kept her commitments to Jeff, such as going to rehab or AA meetings or bringing Jeff home from the group home for holidays. Jeff has been in foster care for almost two years, and DSS is seeking TPR due to a lack of progress in making necessary behavioral changes to remedy safety concerns. Jeff is furious about this and says that no matter what DSS does, he will go back to his mom when he is 18.

Response 1:

- DSS continues with its petition to terminate parental rights
- It cannot find justification for exempting the agency from this ASFA requirement
- The agency will not even consider allowing Jeff to visit his mother, given her lack of progress and the liability issues they could face were something to happen

Discussion Notes

Response 2:

- DSS refers Jeff to a therapist to help him with his anger and frustration with his mother
- The caseworker meets with Jeff regularly to develop an alternative plan, which includes his signing a Voluntary Placement Agreement and continuing in school so he can get his diploma, even though he will be 19 when he finishes
- Jeff expresses no interest in this option. DSS explains the benefits of the LINKS Special Funds program, and how the agency will be able to help him set up his own place, to rent an apartment, and to get further training
- When Jeff does not participate in some of his planning meetings, the plan is discussed without him

Discussion Notes

Response 3:

- DSS accepts Jeff's plan to return to his mother's home and stops the TPR proceedings
- The Family Case Plan includes increasing visitation with the mother, including school holidays, and Jeff will be responsible for arranging his own transportation.
- The focus of social work time will be on helping Jeff to develop strategies to cope with issues that confront him
- DSS makes available services and resources that Jeff needs to explore his plans, always open to the option of changing the plan if this does not work out as he hopes

Discussion Notes

Engaging Relatives

Relative and Kin Contributions



- Caseworkers contribute to attachment, shared parenting, cultural and relational permanency, and safety networks by practicing family-centered, safety-focused, and trauma-informed case management

Notes

Activity: Master Your Stories**What to do:**

- This is a “Snowball Fight” activity
- You will find multiple sheets of blank paper at each table
- On a piece of paper, write”
 - One thought about how bias could impact children and families
 - One strategy to combat that bias
- You may use multiple sheets of paper, if you have more than one bias and strategy to overcome that bias
- As you complete each paper, crumple up the piece of paper
- When the training facilitator says, “Snowball fight!” throw the crumpled papers around the room
- When time is up, pick up one “snowball” and share the information on the paper with your table or small group

Notes

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Appendix

Reflections and Check-In

Reflections and Check-In		
		
Self-Values Reflection	Reasonable Efforts	Two-Level Decision-Making

Reflections and Check-In		
		
Self-Values Reflection	Reasonable Efforts	Two-Level Decision-Making