IDEAS FOR TRANSFER OF LEARNING FOLLOWING CASE ASSESSMENT AND PLANNING TRAINING

It is well established that activities that integrate the content of training once a worker returns back to work are critical in supporting learning. The impact of training events on practice is enhanced when a worker gets the opportunity to examine and apply what he or she has just learned. The supervisor plays a pivotal role in supporting training content and helping a worker move from intellectual learning to application and skill development. In addition, transfer of learning activities provide an opportunity for the supervisor to know the worker better and assess specific elements of his or her value system, knowledge and skill set.

Transfer of learning activities are generally seen as beneficial, but the pressures of daily practice make it difficult to give them the attention most supervisors would like. In order to support supervisors in their role as teachers and coaches to their workers, we are supplying this listing of possible transfer of learning activities. The list is long to offer variety and address the various aspects of practice that may seem pertinent to you for a particular worker. The activities are organized by the section of training to which they apply.

FIRST PRIORITY - ACTION PLAN

Each worker will complete an Idea Catcher that asks him or her for reactions to many of the sections of the training. At the end of the training, they will review their Idea Catcher and, from that, will build an Action Plan. The Action Plan will include three activities they would like to complete in the month following training. Review the Action Plan with the worker and make plans for completing the priorities identified there. (See attached Idea Catcher.)

CHANGE PROCESS

- Review the worker's Idea Catcher to consider ideas he or she generated for how this content can be integrated into practice.

- Use the handout "Applying Training Content on Stages of Change". This provides a structure for experimenting with the use of this approach with a client. (See handout.)

- If this model is exciting for the worker, explore options for additional Motivational Enhancement training. This would offer opportunity to further explore and practice the interviewing techniques introduced in Family-Centered Case Assessment and Planning.

INTERVIEWING

- Review the worker's Idea Catcher including self-observations about interviewing. Help the worker plan for improving those interviewing skills.

- Help the worker plan an interview in advance of meeting with family members. This should include both content (purpose, topics, issues, etc.) and process (techniques and approaches) planning. (Note: this could be combined with Change Process transfer of learning.)

FAMILY ENGAGEMENT AND ASSESSMENT

- Review the worker's Idea Catcher from this section. It will include ideas for connecting with clients and explaining the ongoing case process. This may be particularly salient for new workers.

- The worker could shadow an experienced worker with similar job responsibilities who is making an initial visit to a family. The newer worker should note techniques for engaging with family members.

- Use the handout "Apply Training Content on Engaging Families" to develop a plan for approaching a family in a newly assigned case. (See handout.)

- Discuss the role of the supervisor in regard to the relationship between the worker and family. Include conversation about the need for supervisor feedback regarding boundary issues and the balance of help and authority roles. Discuss the role the supervisor plays in helping workers process feelings elicited by clients.

- Apply the Reference Guide when conducting a Family Assessment and discuss the justification for the worker's ratings.

- Discuss the agency expectations regarding how safety is assessed at Family Engagement and Assessment.

STRENGTH-BASED FAMILY ASSESSMENT

- The new worker can shadow an experienced worker and identify strength-based questions from the interviews.

- Ask the worker to identify strengths and how they can be used to support change within a family.

- When preparing for an interview, develop strength-based questions using the "Five Types of Questions to Identify Strengths" handout. This practice will encourage advanced thinking about strength—based questions. The questions are not intended to be used as a checklist during the interview.

INTEGRATING THE CASE PROCESS, THE CHANGE PROCESS AND THE COURT PROCESS

- Discuss how the case process integrates with the court process within your community, the challenges to integration, and techniques for using court to support the child welfare decision making and case process. (See attached handout "If Life Were Perfect".)

CASE PLANNING

- Review the worker's Idea Catcher from this section and discuss the worker's ideas about how they can more actively involve family members in case planning.

- Discuss the factors that contribute to successful outcomes and the worker's ability to influence them. (See handout "Factors that Facilitate Successful Outcomes".)

- Discuss the agency philosophy regarding case planning including the relationship between the case plan and the court order, timeframes and expectations regarding family involvement. How does this fit with the philosophy of the training?

- Give the worker a closed case with a case plan. This case may include goals that do not meet the criteria for well-written goals presented in the training. Explain that the expectations for case planning within child welfare have evolved across time. Ask the worker to re-write the goals to meet the criteria for well-written goals. Emphasize that this is an exercise for technical practice only. In any open case, goals must be developed with active participation of family members. (See handout "Qualities of Goals".)

- When developing a case plan for a new case, discuss how the worker will prepare the service provider so that they can fulfill their role. Include discussion of information the provider must receive regarding the agency's expected outcomes for the family, ongoing communication expectations, confidentiality issues and documentation expectations. (See handout "Case Manager Role with Service Providers".)

CASE PROGRESS EVALUATION

- Review the worker's Idea Catcher from this section that includes the worker's ideas for making case progress evaluation helpful to families and assures a process that provides the information necessary for child welfare decision making.

- Discuss the role of multidisciplinary case staffings in case progress evaluation. (These are meetings of the service providers involved with a particular family for the purposes of planning, as opposed to internal unit staffings of a case.) Discuss any model the agency uses, identification of appropriate participants and roles of participants in case staffings.

- Review the CPS Ongoing Services Standards and Guidelines for who must be involved in case progress evaluation.

- Use the handouts "Reviewing Service Provision – Provider Information" and "Reviewing Service Provision – Client Information" to gather information for a case progress evaluation. (See handouts.)

- Discuss agency expectations regarding case progress evaluation timelines.

CASE CLOSURE

- Review the worker's Idea Catcher that includes the worker's ideas for how he or she can improve the case closure process for clients.

- Discuss how it is determined within your agency that a case should be closed.

- Discuss agency expectations regarding case closure timelines and documentation.

- Ask the worker to plan a case closure process, paying attention to the client's emotional needs. Be sure to include a plan for addressing problems that the family may have in the future.

CLIENT SATISFACTION

- Discuss contributors to client satisfaction with child welfare services and how your agency strives to foster satisfaction among clients. (See handout "Client Satisfaction Survey".)

The Handouts Referenced Include and Can be Found at http://www.uwgb.edu/newpart/PostTraining.htm:

- Overview of Family-Centered Case Assessment and Planning Curriculum
- Competencies
- Agenda
- Selected Resources
- Blank Idea Catcher
- Strength-Based Definition
- Strength-Based Assumptions
- Types of Strengths
- Five Types of Questions to Identify Strengths
- Apply Training Content on Stages of Change
- Apply Training Content on Engaging Families
- If Life Were Perfect
- Factors That Facilitate Successful Outcomes
- Qualities of Goals
- Case Manager Role with Service Providers
- Who to Involve in Case Progress Evaluation
- Reviewing Service Provision – Provider Information
- Reviewing Service Provision – Client Information
- Client Satisfaction Survey
- Child Welfare Article on Stages of Change

New Information for Supervisors to obtain:

- You can obtain the *Enhancing Motivation to Change in Substance Abuse Treatment* by William R. Miller, Consensus Panel Chair from the US Department of Health and Human Services, Center for Substance Abuse Treatment. (1999) Treatment Improvement Protocol (TIP) Series # 35 at 800-729-6686 for free.