CHILD AND FAMILY TEAM MEETING DOCUMENTATION INSTRUMENT

County of

I. GENERAL INFORMATION

1. Case Name:
2. Case Number:
3. Social Worker Name:
4. Supervisor Name:
5. Facilitator Name:
6. Facilitator Type: --
7. Time Held:
8. Location Held:
9. Meeting Type: --
10. Current Risk --
11. Case Decision Date:
12. Meeting Initiated By:

II. PLANNING AND PREPARATION

13. Meeting Objective as Agreed Upon with the Family:
14. Meeting Introduction and Explanation to the Child/Youth and Family:
15. Child Involvement:
16. Describe How Meeting Participants were Identified by the Family with Help from the Social Worker:

III. MEETING DOCUMENTATION

17. Meeting Participants and Participant Preparation:

Name/Relationship	Preparation Date(s)	Attended or Participated
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18. Document Family Strengths Identified by the Team:

19. Document the Issues Identified by the Team in Priority Order:

20. Services Already Provided to the Family and Family's Use of Those Services:

21. Family / Support Involvement in Family Services Agreement Development:

22. Contingency Plan as Agreed Upon with the Family:

23. Follow-Up Planning:

24. Date of Next Meeting:

25. Issues to be Reviewed / Discussed at Next Meeting:

26. Missing Team Members to be Invited

27. Person Responsible for Inviting These People:

28. Meeting Issues That Need to be Changed, and How the Team Address These Needs:

INSTRUCTIONS FOR COMPLETION OF
CHILD AND FAMILYTEAM MEETING DOCUMENTATION TOOL

The documentation of the Child and Family Team (CFT) Meeting is critical in order to assure that all policies and practice requirements are being met as well as to create an accurate record for subsequent social workers. CFT Meetings should not be viewed as a single event. Rather, they are a process. Documenting the process is as important as documentation of the actual meeting. This documentation should begin during the CPS Assessment and will be completed after the meeting is held. Documentation for the follow-up meeting will then begin on a new form. Below is an explanation of each field. Keeping in mind the process of planning and holding a CFT meeting, the Documentation Tool has been divided into three sections.

The first section, *General Information*, will capture basic information. This portion may be partially completed during the CPS Assessment, when the family is first introduced to CFT Meetings. Introducing CFT Meetings to the family during the CPS Assessment allows adequate time for the family to ask questions and think about whom they would like to have on their team prior to the meeting being scheduled. This portion of the form may be filled out by the assigned CPS Assessment Social Worker, the CPS In-Home Services Social Worker or the facilitator or a combination of these individuals. This form is designed to be shared electronically so that more than one person can add information easily.

The second section, *Planning and Preparation,* will capture the work done before the meeting to prepare all team members as well as the discussions around meeting focus and objectives. This section can be filled out before the meeting takes place, and should be completed by the person who does these tasks. In some counties that will be the assigned social worker. In others, it will be the meeting facilitator.

The third section, *Meeting Documentation,* will capture the work accomplished during the meeting, as well as the preliminary planning for the next meeting. Either the assigned social worker or the meeting facilitator, at the agency's discretion, can complete this section.

Once this form has been completed it should document the process and implementation of one team meeting. Subsequent planning and implementation of follow-up meetings will be documented on a new CFT Meeting Documentation Tool.

NOTE: Exactly who completes each section of this form is left to the discretion of each agency. Some counties may have facilitators who complete the documentation, while other counties may assign this task to the social worker assigned to the case. The information required by this form need not be duplicated elsewhere in the record

I. GENERAL INFORMATION

1. Case Name – This should reflect the name the agency uses to identify the case.

2. Case Number – This should reflect the case ID number the agency uses to identify the case.

3. Social Worker Name – Name of the assigned social worker

4. Supervisor Name – Name of the supervisor of the assigned social worker

5. Facilitator Name – Name of the person facilitating this CFT Meeting

6. Facilitator Type - This is a drop down menu, the choices are described below:
   - Agency Facilitator - This refers to a facilitator employed and/or contracted by the convening agency, whose full-time job is facilitation of CFT Meetings for the convening agency.

   - Outside Facilitator – This refers to a facilitator who is employed by another agency. The convening agency may contract with facilitator's agency for facilitation services.

- Agency Social Worker (not assigned) – This refers to a social worker within the agency, other than the social worker assigned to the case, who has been trained to facilitate CFT Meetings.

- Agency Social Worker (assigned) – This refers to the social worker assigned to the case, this option should only be used in moderate risk cases when no other facilitator is available.

- Supervisor (not assigned) – This refers to a Supervisor within the agency who does not supervise the assigned social worker, and who is trained to facilitate CFT Meetings.

- Supervisor (assigned) – This refers to the Supervisor supervising the assigned social worker. This option, also, should only be used in moderate risk cases when no other facilitator is available.

- Other – This refers to any other person who is trained as a facilitator that does not fit into one of the above categories.

7. Time Held – The time the meeting began.

8. Location Held – Where the meeting was held (school, community agency, church, D.S.S., etc.)?

9. Meeting Type – This refers to the point during the life of the case in which the meeting is being held. This is a drop down menu, the choices are described below:
   - CFT During CPS Assessment (210) – This refers to a CFT Meeting that is held prior to a case decision in the CPS Assessment. Care should be taken that this meeting is not allowed to turn into a fact-finding meeting, as well as to assure that there are valid decisions on which the family can have input.

   - Initial CPS In-Home Services CFT (215) – This refers the first CFT meeting held during the provision of CPS In-Home Services. This meeting should be held with 30 days of the case decision in CPS Assessment.

   - Follow-Up CPS In-Home Services CFT (215) – This refers to any subsequent CFT Meetings held after the initial meeting. These meetings are required to be held at least every quarter in order to review and update the Family Services Agreement, but may be held whenever necessary to assure that the plan continues to be appropriate and workable.

   - CFT Prior to CPS In-Home Services Closure (215) – This refers to a required meeting that is being held because the family has received CPS In-Home Services previously in order to assure that the family knows the resources available to them and that the family has a clear plan to avoid future CPS involvement.

   - CFT Prior to Removal – This refers to a meeting that is being held just prior to a possible removal to ascertain if there are any possible options to removal, and if that is not possible, what the placement options are and how they will be implemented. A CFT shall be held before removal unless the safety of the child(ren) would be compromised by the time it would take to hold a meeting. In this case, a CFT Meeting shall be held as soon after the removal as possible to begin developing a plan to work towards a permanent plan.

   - Initial Foster Care CFT (109) – This refers to the first CFT Meeting during the provision of Foster Care Services. This meeting should be held within 30 days of the child coming into care.

- Follow-Up Foster Care CFT (109) – This refers to any subsequent meetings following the initial meeting held during the provision of Placement Services. These meetings should be held at any interval, at which a Permanency Planning Action Team (PPAT) Meeting is required, or any time the plan needs to be reviewed or changed, as well as at the request of any team member.

- CFT Prior to Placement Change – This refers to a meeting held prior to a change in a child's placement. It is required that a meeting be held prior to a placement change whenever possible, to assess what services might be accessed to stabilize placement, or to discuss what the best placement will be for the child.

- CFT Prior to Foster Care Case Closure (109) – This refers to a meeting that is designed to ensure the family knows the resources available to them and has a clear plan to avoid future CPS involvement.

- Family Requested CFT Meeting – This refers to any CFT Meeting that the family requests be held.

10. Current Risk – This is a drop down menu of Intensive, High, Moderate, or Low. This field is meant to capture the risk rating for the family ***coming into*** the meeting. Risk should be reassessed during the meeting and may different at the end of the meeting.

11. Case Decision Date – Date of most recent finding of In Need of Services or Substantiation.

12. Meeting Initiated By – This field documents the person that requested this meeting. CFT Meeting policy reflects that any team member may request a CFT Meeting. Please include the name of the person or agency requesting the meeting and their relationship to the child(ren).

II. PLANNING AND PREPARATION

13. Meeting Objective as Agreed Upon with the Family – Each CFT Meeting should have a clear purpose that is developed and agreed upon in advance by the family and the social worker. The purpose should be specific to the family. For example: "To create a plan for how Susie will be disciplined without leaving marks or using instruments" would be appropriate while, "To develop a case plan for the Smith family" would not be appropriate. The person who worked with the family to develop the meeting objective is most likely to have the best information to complete this field.

14. Meeting Introduction and Explanation to the Child/Youth and Family – This field reflects the date that CFT Meetings were first introduced to the family and a brief description of how that was completed. This may include the use of a brochure and the family's response to the idea, as well as any other education the social worker did with the family to assist them in understanding the purpose and benefits of a CFT Meeting. Ideally, the family is introduced the CFT Meeting process during the CPS Assessment. If so, the CPS Assessment Social Worker would be the person to complete this field. Note: This field is not meant to capture the child/youth or family's response during the actual meeting; this will be captured in the subsequent sections of the documentation tool.

15. Child Involvement – This field captures how the children will be involved, and what needs the child has in order to participate. The narrative should include a description of child/youth's input as well as that of the family's. Children ***shall*** be involved in CFT Meetings. However, their involvement may occur in different ways. Please describe how the child(ren) will be involved in this meeting and what, if any, concerns were taken into account when choosing this type of involvement.

It is very important that the child(ren) be consulted on this issue, and their views summarized here. Note: This field is not meant to capture the child/youth or family's response during the actual meeting; this will be captured in the subsequent sections of the documentation tool.

16. Describe How Meeting Participants were Identified by the Family with Help from the Social Worker– This field captures the process by which team members were identified by the family with the assistance and guidance of the social worker. This field should also document use of specific tools such as genograms or eco-maps, as well as a description of conversations held with the family about identifying team members, addressing concerns family members may have about inviting certain people, and how those concerns might be alleviated.

17. Meeting Participants and Participant Preparation - This field will capture the names of everyone who was invited to the CFT Meeting, and the date that each person was prepared for the meeting by having roles and rules (norms) for the meeting explained. Specifics of this preparation should be in the on-going case documentation on the date recorded here. Finally, a "yes" or "no" drop-down box captures whether each person invited actually attended the meeting.

III. MEETING DOCUMENTATION

Note: The information gathered in the following fields should come from information gathered **during** the actual CFT Meeting. Counties are cautioned, however, that this tool should not be completed during the actual meeting as the focus should be on the meeting itself and its outcomes. It is completely appropriate, however, to complete the Family Services Agreement during the meeting.

18. Document Family Strengths Identified by the Team – This field documents strengths of both the child/youth and the family. It is very important that time is allocated to thoroughly discuss strengths, as they will be the building blocks of the Family Service Agreement and provide guidance for what interventions might be most effective for the family.

19. Document the Issues Identified by the Team in Priority Order – This field captures the issues identified during the CPS Assessment. For ***Initial CFT Meetings***, this field will capture the issues that were identified during the CPS Assessment. These issues should not come as a surprise to family members as they should have been thoroughly discussed in both the assessment and during preparation for the meeting. This field will also capture discussions the worker has had with the family about prioritization of issues, as often it is overwhelming for families to correct all of their issues at once. For ***Subsequent CFT Meetings***, this field will capture issues carried forward from the previous meeting as well as any issues that may have arisen since the last meeting. These issues should be discussed with the family prior to the meeting as way to develop the meeting objectives. Again, this field will capture discussions the worker has had with the family about prioritization of issues, as often it is overwhelming for families to correct all of their issues at once.

20. Services Already Provided to the Family and Family's Use of Those Services – This field captures a summary of the services that have been offered to the family and the family's response or participation in the services offered, and the outcome or progress achieved.

21. Family / Support Involvement in Family Services Agreement Development - Describe how the family and their supports were involved in the development of the Family Service Agreement, including any ideas put forth by the family that were used, or modified and then used. The primary goal of a CFT Meeting is to join ***with*** the family to create a plan in which they can believe and invest. This field should capture ideas that were put forth by family members and their supports, and then discuss how those ideas were used. Once the strengths and concerns have been identified and resources identified and described to the family, it might be helpful for the "professionals" to leave the room and allow the family some time to come up with a plan.

22. This lets them know that their input really is important and gives them a chance for private discussion. It will also be imperative for the family to understand that the plan will still have to be accepted by D.S.S. (and the court, in some cases). If *family private time* is used, it will also be important that the family know exactly what the parameters are, and understand any *non-negotiables.*

23. Contingency Plan as Agreed Upon with the Family - In this field, document the alternative plan developed with the family in the event the primary plan does not work out. This might include a follow up CFT Meeting, a safety resource placement, or even changing the Permanent Plan, as well as any number of other back ups the team might create. This plan should not be used as a threat to the family, but instead as a way of providing transparency while encouraging continued partnership.

24. Follow-Up Planning – This field captures the follow-up plan, including how the family and team will know if the plan is not working. This field also captures the person(s) responsible for determining the progress of the plan. This does not need to be the sole responsibility of the social worker and it is often more effective when natural supports or community members take part in this task. However, the social worker's responsibilities should also be documented here. It is also important to discuss team expectations to determine if the plan is being followed and if risk of harm is being reduced. For example, if one of the plan goals states, "mom will read literature on discipline strategies, discuss it with her sister, and decide on new discipline strategies to try with her child" then mom's sister can agree to have in-depth conversations with mom, and assist her in choosing some strategies that might work best. The child's teacher might agree that the child would report different discipline strategies when asked. The family's neighbor might report that she would no longer see mom "yank the child by her arm, but instead would see her redirecting child in a safer way." Having discussed this in the CFT Meeting will help focus all team members on what they responsibilities they each team member has once they leave the meeting.

25. Date of Next Meeting – It is important that all team members know that they can request that the team be brought back together at any time they feel it is necessary. However, setting a date and time for the next meeting is equally important as it gives team members a clear understanding of when they will need to report back on the progress of the plan.

26. Issues to be Reviewed / Discussed at Next Meeting – This field captures the issues that the team knows in advance will need to be discussed. While the team may know not all issues that will need to be addressed within the next 60-90 days from this meeting, it is helpful to identify any known issues. This is also an opportunity for the team to review its prioritized list of issues and decide when to bring a new concerns or goals to the table. The child/youth or family may have issues that are important to them that they would like to have put on the agenda as well.

27. Missing Team Members to be Invited – This field captures anyone that was not present for this meeting, but identified by the team as someone who would be appropriate to be invited to the next meeting. This may be someone that the child/youth or family was not initially comfortable inviting or someone that had not been thought of previously.

28. Person Responsible for Inviting These People – While the social worker or facilitator will need to assist in preparing people, it may be that someone on the team will make the initial invitation to the person(s) listed in field 26.

29. Meeting Issues That Need to be Changed, and How the Team Address These Needs – This field captures the individual needs and beliefs of the child/youth or family and the way in which those needs and beliefs will be incorporated into the next meeting. Families may be unable to express ideas that would make the meeting more comfortable for them until they have experienced a meeting. This is an important place to repeat the question of any opening or closing rituals, ground rules or other ways that the meeting can be customized for each family.