Coordinated Case Planning
Overview

Excerpt from CCP Cluster Workshop
Linkages Fall Convening
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Workshop learning objectives

- Review benefits/challenges of coordinated case planning with Linkages families
- Learn about variety of methods Linkages counties are using to put coordinated case planning into practice
- Identify continuing issues for the CCP Peer Cluster to examine in future teleconferences
Why create coordinated case plans?

- Integrative power of collaboration: economic self-sufficiency helps reduce maltreatment risk; more stability at home improves likelihood of work participation
- Recognize and meet basic needs of families first (think Maslow’s hierarchy of needs)
- Streamline conflicting expectations to improve family’s achievement of case plan goals
- Focus on client strengths, skills & potential more than insights/judgments
- Maximize coordinated time & attention spent with family by Linkages team to promote success
How CCP helps Linkages families

- Family-focus of Linkages supports meeting parent’s needs to broaden traditional child-centered case planning process (WIIFM)
- Active involvement in WtW implies commitment to a better future; team encourages parent to transfer this strength to build parenting capacity
- Blending goals of self-sufficiency and family stability creates sense of hope for the future, rather than compliance only
- Shared understanding of case information in advance helps define service responses better matched to actual needs
What conditions promote CCP?

- Leadership endorsement to set expectations and visibly reinforce CCP
- Integrate CCP for Linkages families into existing collaborative forums (MDT, FTM, TDM, etc.)
- Family involvement essential for effective CCP
- Blending cultures (an intention that can be expressed in many ways)
  - Co-location
  - Meet & greets
  - Technology
  - Joint training
  - Stories, videos, newsletters
Key issues identified by cluster

- Need for simple “cover sheet” to document Coordinated Services Plan (rather than attempting unified case plan)
- Ensuring coordination is ongoing through mutual case life span (rather than only at case opening—when it’s crisis time)
- Build on examples from other counties…
What approaches are counties taking to implement CCP?

Coordination is organized around 3 main concepts:

- Needs
- Services
- Costs
Examples from your peers...

- El Dorado
- Madera
- San Francisco
- San Luis Obispo
- Shasta
- Stanislaus
- Tehama
- Trinity
- Tulare
Glossary of Terms

- CCP = Coordinated Case Plan
- CWS = Child Welfare Services
- ETW = Employment & Training Worker
- EW = Eligibility Worker
- FM = Family Maintenance
- FR = Family Reunification (AB 429)
- PS = Protective Services
- SW = Social Worker
- VFM = Voluntary Family Maintenance
- WtW = Welfare to Work
El Dorado County

• Coordinates services for mutual VFM, FR and Court FM mutual cases.
• Early in the case plan process, initial staffing held between WtW and CWS workers—does not include the family.
• Linkages Services & Cost Designation Form used to prioritize service needs & which program will provide services.
• Form sits “on top” of WtW & CWS plans. Updated when these plans change.
El Dorado County (cont.)

- Linkages Services & Cost Designation Form (see Toolkit)
- WtW & CPS workers collaborate to prioritize service needs and determine which program will provide services
- Covers all domains of service needs
- Prompts workers to check with Eligibility Worker to ensure family receives all benefits to which they are eligible
Madera County

- Mutual cases identified at intake and scheduled for Linkages staffing.
- WtW & CWS case managers collaborate with family to develop joint case plan.
- Case mgrs continue service coordination for FM/CalWORKs and FR/CalWORKs cases until CWS case closed.
- Of 19 linked cases in FY 08-09 → No abuse or neglect recurrence at 3, 6 and 9 months
San Francisco County

- Linkages cases ID’d via monthly match list
- All Linkages cases have CCP meeting w/in first 3 months of CWS case opening for:
  - Families receiving CalWORKs & court FM services
  - Families receiving CalWORKs & voluntary FM
  - Families eligible for AB429 (CalWORKs/FR)
- Parent(s) critical players in CCP meeting
- CWS worker & CalWORKs worker engage in ongoing communication from intake thru case closure
San Francisco County (flow chart)

Unit Supervisor

Monthly match list

Assigned SW

Confirm Linked Case

Linkages Coordinator

Pre-Staffing

CCP Meeting

By 60-90 days

• Parent(s)
• Assigned SW
• CalWORKs ES
• CalWORKs EW
• Other providers
• Others w/role in case plan(s)

CWS Plan

WtW Plan

Family Plan Summary

Linkages Coordinator

Linkages After Care Meeting

Assigned SW

At CWS case closure

Pre-Staffing

CWS Plan

WtW Plan

Family Plan Summary
San Luis Obispo County

- Uses “One Door Model”
- All Linkages cases eligible for CCP
- PS & CWS workers consult w/in 3-5 days of intake assessment (see SLO decision trees)
- CCP developed with family to align goals, services & timelines of CWS & WtW plans
  - Best practice timing: Family Team Mtg held prior to CWS case plan submission to court
  - See packet for CCP documentation
San Luis Obispo County (cont.)

- CWS case plan requirements take priority over WtW plan requirements
  - Use CWS case plan activities to fulfill 32/35 hour work requirements for WtW

- Ongoing coordination includes:
  - Monthly joint visits
  - Monitor CCP progress
  - Ensure after care supports are in place
Shasta County

- Service coordination initiated at front end for all AB 429-FR & FM/VFM mutual cases to assist families early.
- Parents participate in coordinated case planning meeting when CWS case opens.
- Goal is to identify services to help stabilize the family & promote reunification.
- Linkages Coordinator ensures WtW and CWS workers communicate from intake to case closure.
Shasta County (flow chart)

Screen family for Linkages eligibility at referral → Promote to case → FR/CalWORKs → FM/CalWORKs → Flag as Linkages in data systems

Parent(s) receive CalWORKs supportive services (up to 6 months)

Complete Coordinated Case Plan
- Refer parent(s) to coordinated services
- Notify fiscal of who pays for what

Conduct CCP Meeting

Meeting Participants:
- Parent(s)
- CWS social worker
- WtW worker
- Service providers
- Linkages Coordinator
Stanislaus County

- All new voluntary FM cases screened for family’s participation in or potential eligibility for CalWORKs
- Also screened at time of trial visit for FR
- If “Linked”, then CWS and CalWORKs:
  - share assessments of family’s safety & self-sufficiency needs
  - identify roles and responsibilities
  - plan what resources & services will be utilized (see Toolkit)
Stanislaus County (cont.)

Strategy for Solutions and Goal Setting

- Family’s Concerns
  - Parenting Support
  - Child Behavior
  - Substance Abuse
  - Mental Health
  - Domestic Violence
- Agency’s Concerns
  - Parenting Support
  - Substance Abuse
  - Mental Health
  - Domestic Violence
  - Child Behavior
  - WTW Sanction
  - Disability
  - Other

Responsibilities

Social Worker
To make referral to:
* Parenting Support
* Child behavior

Customer
To comply with all recommendations:
* Attend Parenting
* Attend Substance Abuse evaluation

BHRS Counselor
To set up evaluation for:
* Domestic Violence
* Substance Abuse

Homeless:
* Received temp only

FSS
To make referral to:
* GED services
* Behavioral Health

Other Partners
To make referral to:
* WIA
* Public Health

Time Limits:
* 36 months remaining
Tehama County

- All CSW & employment services (ES) referrals screened for suitability for CCP
  - Families in CalWORKs and CWS
  - Families eligible for AB 429 services
- Linked cases: SW, ETW & EW meet to coordinate case plans
- Each plan has same case plan components
- TLC Fiscal Case Plan (see Toolkit) shows which program will pay for each service planned
Tehama County (cont.)

- TLC Fiscal Case Plan completed w/in 10 days of detention (or CWS case opening)
- CSW worker & ETW encouraged to talk frequently about mutual cases
- Schedule case staffing whenever parent is:
  - Not meeting requirements for either program
  - Due to be discontinued from either program
  - Is going off cash aid
  - Or anytime SW, ETW or EW feels staffing is necessary
Trinity County

- Family ID’d by Linkages Coordinator & presented at monthly Linkages meetings.
- Eligible families added to Linkages Coordination Worksheet—monitor until case closed with CPS.
- Complete CCP outlining family’s responsibilities, goals & all units involved.
- Review family’s progress & cooperation at monthly meetings.
Tulare County

- When family enters Linkages program, Linkages Team* shares separate CWS & CalWORKs family assessments
- Within 2 weeks Linkages Team meets with parents to develop CCP (see Toolkit)
- Family’s strengths, barriers, needs, concerns, activities & required hours are integrated into the CCP & determines next steps with the parents

* Self Sufficiency (SS) Counselor, SS Resource Specialist, SS Sup, CWS Worker, CWS Team Leader, and CWS & TulareWORKs Liaisons
Tulare County (cont.)

- CCP meeting may result in changes to any existing WtW plan or CWS case plan
- CWS worker & Self Sufficiency Resource Specialist monitor progress & compliance in their respective areas of the CCP
- Throughout case* life cycle, Linkages Team & parents meet as necessary to jointly discuss any plan modifications

* Target populations for CCP: VFM, FM, Diff Resp. and FR
For more specifics...

- Return to the Linkages Toolkit for a table of documents further detailing the coordinated case planning protocols from various counties.

- For each county listed, you’ll find:
  - Overview of CCP protocol
  - Policies & Procedures
  - CCP Forms
For more information…

How could we use that idea in our county?

How can we get staff to buy-in?

Who can I contact to learn more?

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