



**209**

**Integrating Concurrent Planning  
into Child Welfare Practice**

**A Training Outline**

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**For the  
Pennsylvania Child Welfare Training Program**

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## **209: Integrating Concurrent Planning into Child Welfare Practice (6 hours)**

### **Acknowledgements**

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## 209: Integrating Concurrent Planning into Child Welfare Practice (6 hours)

### Agenda for a One-Day Curriculum on Integrating Concurrent Planning into Child Welfare Practice

#### Day One

<b>Estimated Time</b>	<b>Section Name</b>	<b>Page Number</b>
20 Minutes	<b>Section I:</b> Introduction	3
55 minutes	<b>Section II:</b> Knowledge Review	6
30 minutes	<b>Section III:</b> Tuning in to Others: The Impact of Sequential Planning on Children	7
45 minutes	<b>Section IV:</b> Planning for Permanency: A Three-Stage Process	8
30 minutes	<b>Section V:</b> Collaborative Communications & the Full Disclosure Interview	9
1 hour, 15 minutes	<b>Section VI:</b> Three-Stage Case Planning Skills Practice	11
1 hour, 30 minutes	<b>Section VII:</b> Full Disclosure Interview Skills Practice	12
15 minutes	<b>Section VIII:</b> Transfer of Learning & Evaluation	13

Section Name	Estimated Time	Key Concepts	Resources Used
<b>Section I:</b> Introduction	20 Minutes	<p><b>Method of Presentation:</b> Lecture, Large Group Discussion, or Optional Individual Work or Small Group Activity</p> <p><b>Trainer Note:</b> Before the session, using flip chart paper, prepare a <i>Parking Lot</i>, <i>What's In It For Me (WIIFM)</i>, as well as flip charts titled <i>Barriers</i>, <i>Successes</i>, and <i>What I Need to Know about Concurrent Planning</i></p> <p>An optional <b>Appendix #1: PowerPoint Presentation: Integrating Concurrent Planning into Child Welfare Practice</b> is available for use, which offers all overheads used in the workshop. Not all training facilities offer the means to use PowerPoint.</p> <p>Post <b>Appendix #3 (Concurrent Planning for Timely Permanency)</b> for later use.</p> <p>Please be sure to review the <b>Pre-work</b> that participants were requested to complete; and, refer to these items throughout the appropriate points of the training day.</p> <p><b>Appendix #4 (ASFA) &amp; Appendix #5 (Concurrent Planning in Public Child Welfare Agencies: Oxymoron or Work in Progress)</b> are provided as a resource for the trainer for him/herself and/or to share with participants in conjunction with content.</p> <p><b>Key Concepts:</b></p> <ul style="list-style-type: none"> <li>• <u>Welcome/Housekeeping Items</u> <ul style="list-style-type: none"> <li>○ Review training program guidelines reminding participants</li> </ul> </li> </ul>	<p>Flip Chart Stands/Pads Laptop Computer (optional) LCD Projector (optional) Markers Name Tents Overhead Projector/Screen Prepared Flip Charts</p> <p><b>Appendix #1 (PowerPoint Presentation: Integrating Concurrent Planning into Child Welfare Practice)</b> (optional)</p> <p><b>Appendix #3 (Concurrent Planning for Timely Permanency)</b></p> <p><b>Appendix #4 (ASFA)</b></p> <p><b>Appendix #5 (Concurrent Planning in Public Child Welfare Agencies: Oxymoron or Work in Progress)</b></p> <p>Handout #1 (Learning Objectives/Agenda) Overhead #1 (Learning Objectives) Overhead #2 (Agenda) Overhead #3 (Concurrent Planning) Overhead #4 (Key Points) <b>Pre-work #1 (Pre-work Letter)</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
		<p>to turn cell phones on vibrate and to refrain from sending text messages and Email until break.</p> <ul style="list-style-type: none"> <li>• <u>Introduction of Trainer</u> <ul style="list-style-type: none"> <li>○ Display your name, county, and role on a flip chart sheet, as a sample name tent for the participants. Also, share a barrier, success, and what you need to know about concurrent planning, related to integrating concurrent planning into child welfare practice.</li> </ul> </li> <li>• <u>Participant Introductions</u> <ul style="list-style-type: none"> <li>○ Ask participants to complete name tents. <ul style="list-style-type: none"> <li>▪ Ensure that they identify their service units, as, for activities, participants may be grouped by service specialty.</li> <li>▪ On the inside of the name tent, ask participants to list at least one (1) challenge that they have regarding concurrent planning and planning for permanency for the children on their case load.</li> </ul> </li> <li>○ Have participants introduce themselves to the other participant at their table and instruct them to share their barriers, successes as well as what they need to know about concurrent planning. Have a representative from each table share an example of each to the large group. Write their responses on the corresponding flip chart sheet.</li> </ul> </li> <li>• <u>WIIFM</u> <ul style="list-style-type: none"> <li>○ Capturing participant feedback on the respective prepared flip charts, review the successes, barriers, and what participants need to know about concurrent planning – identifying content that will be covered in the curriculum and items for the <i>Parking Lot</i>. Explain the <i>Parking Lot's</i> purpose.</li> </ul> </li> </ul>	<p><b>Pre-work #2 (Pre-work)</b>  <b>Pre-work #3 (Concurrent Planning: Benefits and Pitfalls)</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
		<ul style="list-style-type: none"> <li>○ As appropriate, inform participants that you will incorporate information throughout the training day that will meet their needs – so they leave the room with knowledge/skills that will assist them with their challenge – or will refer them to a resource that will assist them with their challenge.</li> <li>● <u>Challenges Discussion</u> <ul style="list-style-type: none"> <li>○ Facilitate a large group discussion regarding the challenges emphasizing that the challenges they listed are also factors that could adversely affect concurrent planning efforts, ensuring that the following points are covered: <ul style="list-style-type: none"> <li>▪ Lack of training and support for resource families – this can disrupt the child’s placement and put resource families and biological in an adversarial relationship</li> <li>▪ Equating concurrent planning with adoption – concurrent planning is not designed to fast track adoption</li> <li>▪ Ignoring cultural differences in developing family services plans and assessing – this sets up families to fail</li> <li>▪ Interpreting twelve (12) months as an absolute limit on reunification efforts – consideration must be given to parents’ motivation, progress and the likelihood of reunification (e.g., a parent in long-term addiction treatment)</li> <li>▪ Lack of education and/or conflict with juvenile court judges and attorneys</li> <li>▪ Not appropriately selecting families</li> <li>▪ Recruiting appropriate resource families to be placement option B – not all resource families, both relative and foster, are ready for this difficult and</li> </ul> </li> </ul> </li> </ul>	

Section Name	Estimated Time	Key Concepts	Resources Used
		<p style="text-align: center;">sometimes painful role</p> <ul style="list-style-type: none"> <li>• <u>Overview of the Training Day</u> Review <b>Handout #1 (Learning Objectives/Agenda)</b>, <b>Overhead #1 (Learning Objectives)</b> and <b>Overhead #2 (Agenda)</b> are available for display. Conclude this section by providing a broad overview about Concurrent planning. <b>Overheads #3 (Concurrent Planning)</b>, and <b>Overhead #4 (Key Points)</b>, are available.</li> </ul> <p><b>NOTES:</b></p>	
<p><b>Section II:</b> Knowledge Review</p>	<p>55 minutes</p>	<p><b>Method of Presentation:</b> Trainer Lecture, Small Group Activity, Large Group Discussion</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Trainer Note:</b> You may conduct this section by displaying the individual pages of <b>Overhead #5 (Concurrent Planning Knowledge Review)</b> one at a time or by using <b>Handout #2 (Concurrent Planning Knowledge Review)</b>. The activity is more interactive for the participants and raises more questions when you display one question at a time. The answers are provided in <b>Appendix #2 (Concurrent Planning Knowledge Review Answer Key)</b>.</p> </div> <p><b>Key Concepts:</b></p> <ul style="list-style-type: none"> <li>• <u>Knowledge Review</u> <ul style="list-style-type: none"> <li>○ Display page one (1) of <b>Overhead #5 (Concurrent Planning Knowledge Review)</b> to ensure that all participants understand the guidelines for the knowledge</li> </ul> </li> </ul>	<p><b>Appendix #2 (Concurrent Planning Knowledge Review Answer Key)</b> <b>Handout #2 (Concurrent Planning Knowledge Review)</b> <b>Overhead #5 (Concurrent Planning Knowledge Review)</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
		<p>review activity.</p> <ul style="list-style-type: none"> <li>• <u>Trainer Lecture - Knowledge Review Competition</u> <ul style="list-style-type: none"> <li>○ Distribute <b>Handout #2 (Concurrent Planning Knowledge Review)</b> as a reference.</li> <li>○ Display questions and answers <b>Overhead #5 (Concurrent Planning Knowledge Review)</b>, including key concepts. Using this interactive method provides interaction for the participants and maintains engagement while reviewing the historical perspective and key concepts of concurrent planning. After each question, ask whether participants have any questions, and as applicable, facilitate a large group discussion, offering any key points where appropriate.</li> </ul> </li> </ul> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Trainer Note:</b> If there is a tie, for additional points, feel free to ask a bonus question such as: Well-being has three components, what are they – Mental Health, Physical Health, Education.</p> </div> <p><b>NOTES:</b></p>	
<p><b>Section III:</b> Tuning in to Others: The Impact of Sequential Planning on Children</p>	<p>30 minutes</p>	<p><b>Method of Presentation:</b> DVD, Trainer Lecture, Large Group Discussion</p> <ul style="list-style-type: none"> <li>• <u>Introduction to DVD</u> <ul style="list-style-type: none"> <li>○ Inform participants that they are going to see a DVD that demonstrates the worst-case scenario impact of sequential planning. Explain that the DVD will illicit an emotional response and, following the DVD, they will be asked to use the skill Tune in to Self and Others to reflect</li> </ul> </li> </ul>	<p><b>DVD (Multiple Transitions: A Young Child’s Point of View on Foster Care and Adoption)</b> (AKA, Multiple Transitions)</p> <p><b>Handout #3 (Multiple Transitions Participant Reflections)</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
		<p>upon their emotional response to the DVD.</p> <ul style="list-style-type: none"> <li>• <u>DVD</u> <ul style="list-style-type: none"> <li>○ Play the entire <b>DVD (Multiple Transitions)</b>, (16 minutes).</li> </ul> </li> <li>• <u>Self Reflection</u> <ul style="list-style-type: none"> <li>○ Upon DVD completion, ask the group to spend sixty (60) seconds reflecting on the DVD's content.</li> <li>○ After sixty (60) seconds, ask participants to complete <b>Handout #3 (Multiple Transitions Participant Reflections)</b>. During the activity if needed, walk around the room encouraging reluctant participants to complete the handout.</li> </ul> </li> <li>• <u>Trainer Lecture and Sharing</u> <ul style="list-style-type: none"> <li>○ After allowing at least five (5) minutes for handout completion, lead group sharing by discussing your answers to <b>Handout #3 (Multiple Transitions Participant Reflections)</b>.</li> <li>○ Encourage participants who want to share their responses with the larger group.</li> </ul> </li> </ul> <p><b>NOTES:</b></p>	
<p><b>Section IV:</b> Planning for Permanency: A Three-Stage Process</p>	<p>45 minutes</p>	<p><b>Method of Presentation:</b> Trainer Lecture, Large Group Discussion</p> <ul style="list-style-type: none"> <li>• <u>Trainer Lecture</u> <ul style="list-style-type: none"> <li>○ Referencing the poster, <b>Appendix #3 (Concurrent Planning for Timely Permanency)</b>, show <b>Overhead #6 (Concurrent Planning for Timely Permanency)</b>; and, distribute <b>Handout #4 (Concurrent Planning for Timely</b></li> </ul> </li> </ul>	<p><b>Appendix #3 (Concurrent Planning for Timely Permanency)</b> <b>Handout #4 (Concurrent Planning for Timely Permanency)</b> <b>Handout #5 (Concurrent</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
		<p><b>Permanency</b>). These items show how the three-stage concurrent planning model works in unison with the case planning process/timeline.</p> <ul style="list-style-type: none"> <li>○ Using <b>Handouts #5 (Concurrent Planning: A Three-Stage Model of Casework)</b>, explain the Three-Stage Planning Process. Emphasize the need to focus on parent behavior – not promises, clear reporting to all involved parties (including the legal team), as well as the child’s need for stability. <b>Overhead # 6a (Concurrent Planning: A Three-Stage Model of Casework)</b> is available to help facilitate discussion.</li> <li>● <u>Trainer Lecture</u> <ul style="list-style-type: none"> <li>○ Explain that, in the afternoon, they will apply a case to the Three-Stage Case Planning Process.</li> </ul> </li> </ul> <p><b>NOTES:</b></p>	<p><b>Planning: A Three-Stage Model of Casework)</b>  <b>Overhead #6 (Concurrent Planning for Timely Permanency)</b>  <b>Overhead #6a (Concurrent Planning: A Three-Stage Model of Casework)</b></p>
<p><b>Section V:</b>  Collaborative Communications &amp; the Full Disclosure Interview</p>	<p>30 minutes</p>	<p><b>Method of Presentation:</b>  Trainer Lecture, Large Group Discussion</p> <ul style="list-style-type: none"> <li>● <u>Trainer Lecture</u> <ul style="list-style-type: none"> <li>○ Ask participants whether they currently explain ASFA timelines to their clients and all other parties involved with the child – alternative caregivers, collaborating agencies, etc. Follow the question by asking participants what points they include in their discussion.</li> <li>○ Explain that the Full Disclosure Interview (FDI) is a key part of effective concurrent planning. As stated earlier in the training, effective concurrent planning includes honest discussions with all parties that focus on the child’s need</li> </ul> </li> </ul>	<p><b>DVD (Concurrent Planning Full Disclosure Interview)</b>  <b>Handout #6 (Concurrent Planning Full Disclosure Interview)</b>  <b>Overhead #7 (Concurrent Planning Full Disclosure Interview)</b></p>

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		<p>for safety, well-being, and permanency. The FDI provides structure and format to these discussions. A FDI must occur within a few weeks of the initial placement and, minimally, at each stage of the planning process. It is good practice to conduct a FDI at least every sixty (60) to ninety (90) days.</p> <ul style="list-style-type: none"> <li>○ Using <b>Handout #6 (Concurrent Planning Full Disclosure Interview)</b> and <b>Overhead #7 (Concurrent Planning Full Disclosure Interview)</b>, explain the critical components to be included when conducting a FDI.</li> <li>● <u>Trainer Lecture</u> <ul style="list-style-type: none"> <li>○ Explain that, in the afternoon, participants will outline the key points of the FDI for a case on their caseload or in their unit.</li> </ul> </li> <li>● <u>Trainer Lecture</u> <ul style="list-style-type: none"> <li>○ Play the <b>DVD (Concurrent Planning Full Disclosure Interview)</b>. Ask participants to use <b>Handout #6 (Concurrent Planning Full Disclosure Interview)</b> to identify whether the Child Welfare Professional (CWP) covers all the key points of a FDI <ul style="list-style-type: none"> <li>▪ The DVD demonstrates the skill of conducting a FDI with a father who has been recently located. His 5-year-old daughter Katie has been in out-of-home placement for 2 months.</li> </ul> </li> <li>○ Upon completion of the DVD, facilitate a discussion identifying the parts of the DVD that covered the key points of a FDI.</li> </ul> </li> </ul> <p><b>NOTES:</b></p>	

Section Name	Estimated Time	Key Concepts	Resources Used
<b>Section VI:</b> Three-Stage Case Planning Skills Practice	1 hour, 15 minutes	<p><b>Method of Presentation:</b>            Trainer Lecture, Individual Work, Small Group Work and Presentation</p> <div style="border: 1px solid black; padding: 5px;"> <p><b>Trainer Note:</b> Set up table groups according to practice area/unit. Depending upon the size of the group, conduct this activity by asking each participant to complete the handout or by asking the table groups to select one person to share their case with the group.</p> </div> <ul style="list-style-type: none"> <li>• <u>Trainer Demonstration</u> <ul style="list-style-type: none"> <li>○ Using a case from your experience, introduce <b>Handout #7 (A Three-Stage Model of Casework Practice: Skills Practice)</b> to participants. Select a case in which you realized that you needed to change your actions either during Stage 1 because you were not providing enough support to a parent who was disorganized and grieving or Stage 3 in which you were still doing everything for the parent and they were demonstrating minimal, if any action.</li> </ul> </li> <li>• <u>Skill Practice</u> <ul style="list-style-type: none"> <li>○ Ask participants to think of a case where a child is currently in out-of-home placement or a case in which they are likely to recommend out-of-home placement. If they need to, they may think of a recent case.</li> <li>○ Using <b>Handout #7 (A Three-Stage Model of Casework Practice: Skills Practice)</b>, ask participants to identify the stage of activity of the CWP and the stage of activity of the client – ensuring to note if the stages are in sync or whether the he/she needs to alter/change his/her behavior. Allow participants ten (10) to twenty (20) minutes to complete the handout. Rotate around the room to ensure that participants understand the skill practice and are focusing on child welfare issues according to law,</li> </ul> </li> </ul>	<b>Handout #7 (A Three-Stage Model of Casework Practice: Skills Practice)</b>

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		<p>and not their values, parental behaviors, or promises.</p> <ul style="list-style-type: none"> <li>• <u>Small Group Skill Review and Presentation</u> <ul style="list-style-type: none"> <li>○ Have the table groups select one (1) case from the group to present to the larger group.</li> <li>○ As the groups present, challenge the presenters to focus on parental behavior, not promises or emotions. Additionally, remind participants to focus on their behavior, not all the emotional challenges of working with the family and the system.</li> <li>○ Inform participants they will be using the same case to practice the skills associated with the FDI.</li> </ul> </li> </ul> <p><b>NOTES:</b></p>	
<p><b>Section VII:</b> Full Disclosure Interview Skills Practice</p>	<p>1 hour, 30 minutes</p>	<p><b>Method of Presentation:</b> Trainer Demonstration, Skill Practice, Small Group Work and Presentation</p> <ul style="list-style-type: none"> <li>• <u>Skill Demonstration</u> <ul style="list-style-type: none"> <li>○ Ask a participant whether they are willing to be the parent from their case example while you act as the CWP conducting a FDI. Conduct a five (5) to ten (10) minute demonstration of the FDI.</li> </ul> </li> <li>• <u>Skill Practice Activity</u> <ul style="list-style-type: none"> <li>○ Inform participants that instead of them conducting a FDI live, they will consider the content to include in their interview by completing <b>Handout #8 (Full Disclosure Interview Skills Practice)</b>.</li> <li>○ Remind participants to provide only the facts to complete the handout, not all the minute details of the case.</li> </ul> </li> <li>• If time allows, facilitate live demonstrations of the FDI.</li> </ul> <p><b>NOTES:</b></p>	<p><b>Handout #8 (Full Disclosure Interview Skills Practice)</b></p>

Section Name	Estimated Time	Key Concepts	Resources Used
<p><b>Section VIII:</b> Transfer of Learning &amp; Evaluation</p>	<p>15 minutes</p>	<p><b>Method of Presentation:</b> Trainer Lecture, Large Group Discussion, Individual Work</p> <ul style="list-style-type: none"> <li>• <u>Summary of Day, Parking Lot, and WIIFM</u> <ul style="list-style-type: none"> <li>○ Reviewing <b>Handout #1 (Learning Objectives/Agenda)</b>, the <i>Parking Lot</i>, and the <i>WIIFM</i>, summarize the day; and, ensure that participants needs were/are met in some fashion.</li> </ul> </li> <li>• <u>Transfer of Learning Plan</u> <ul style="list-style-type: none"> <li>○ Ask participants, being as specific as possible to ensure that they place their plan into action to plan for permanency for all children, to complete <b>Handout #9 (Integrating Concurrent Planning into Child Welfare Practice Self-Assessment)</b>.</li> </ul> </li> </ul> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><b>Trainer Note:</b> If this training is part of a Transfer of Learning (TOL) Package, allow the supervisors to assist their workers in identifying additional concurrent planning tasks to add to their action plans.</p> </div> <ul style="list-style-type: none"> <li>○ Encourage all participants to show their self-assessments and action plans with their supervisors.</li> <li>• <u>Bibliography</u> <ul style="list-style-type: none"> <li>○ Distribute <b>Handout #10 (Bibliography)</b> to participants, which lists the resources referenced throughout the training.</li> </ul> </li> <li>• <u>Evaluation</u> <ul style="list-style-type: none"> <li>○ Ask participants to complete the workshop's evaluation form</li> </ul> </li> </ul> <p><b>NOTES:</b></p>	<p><b>Evaluations</b> <b>Handout #1 (Learning Objectives/Agenda)</b> <b>Handout #9 (Integrating Concurrent Planning into Child Welfare Practice Self-Assessment)</b> <b>Handout #10 (Bibliography)</b></p>