	<b>Policy Title:</b>	Family Services Agreement/Child & Family Team Meeting Policy				
	<b>Policy Number:</b>	Admin Policy 012	<b>Version:</b>	1	<b>Effective Date:</b>	10/15/20

**Approved By:** Operations Team

**Date:** 10/01/2020

## Overview

**Description:** The Department of Social Services-Youth & Family Services Division (DSS-YFS) Family Services Agreement/Child & Family Team Meeting (FSA/CFT) Policy seeks to provide instruction and guidance around the way in which staff across the Division work together to complete the NC Family Services Agreements (In Home and Permanency Planning), NC Permanency Planning Review (PPR) Form and the North Carolina Child and Family Team Meeting Safety Planning Form.

**Purpose/Rationale:** In accordance with the Adoption & Safe Families Act of 1997, YFS staff work diligently to promote the safety, permanence, and well-being of children and families in Mecklenburg County. Much of the agency’s work with families in these areas is supported by the development, review, and continued monitoring of Family Services Agreements, as well as through the development and regular convening of Child & Family Team Meetings. To better support the counties in achieving positive outcomes for all families served by local child welfare systems, the North Carolina Division of Social Services (NCDSS) revised the forms underpinning these processes, turning what were once very program and role-specific responsibilities, into a process that is more unified in nature. This policy exists to provide guidance to staff around the implementation of this process change.


**Applicability:** Staff within the Child Protective Service Investigation (CPI), Family Intervention (FI) and Permanency Planning (PP) service areas; Director & Deputy Directors.

### Definition(s):

In-Home Family Services Agreement (DSS 5239): NCDSS form designed to document the plan for responding to the conditions or needs that threaten a child’s safety and place him or her at risk of future harm, while identifying and building on the family’s strengths

NC Permanency Planning Family Services Agreement (DSS 5240): NCDSS form designed to meet the following objectives:

- Identify the family’s needs and activities to address the needs associated with county child welfare involvement
- Review the family’s progress toward accomplishing objectives and activities associated with the parental behaviors of concern that are the basis for agency custody

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- Identify any barriers to completion of a plan along with activities to address those barriers
- Review progress towards accomplishing the activities to address all barriers
- Identify family / caregiver well-being needs and the follow-up required to address those needs

NC Permanency Planning Review Form (DSS 5241): NCDSS form designed to meet the following objectives:

- Identify child well-being needs and the follow-up required to address those needs
- Review the established permanency plans for each child and whether the plans are in the child’s best interest
- Review the placement for each child and whether that placement is in the child’s best interest
- Capture recommendations for plan modification

Child & Family Team Meeting Safety Planning: NCDSS form designed to document any meeting, most typically pre-custody CFT meetings, requiring an agreement with a family to address a safety threat, placement, or high risk

Child & Family Team (CFT) Meetings: meetings comprised of family members and their community supports that are designed to achieve the following objectives:


- Reach agreement regarding the child welfare issues to be addressed, and the ways in which they will be addressed, throughout the life of the case
- Develop a FSA or safety plan that is created using the best ideas of the family, along with their formal and informal supports, that reduces risk and increases safety for all involved
- Plan for how all team members will participate in, support, and implement the FSA or safety plan

Shared Drive: Youth and Family Services Shared Drive that allows all staff access to the minutes in Word Document forms from specific CFTs. The documents can be “saved as” for future meetings. The location is on the YFS Shared Drive (G), open folder “XFER”, open folder FSA-CFT, open folder worker’s name.

**Failure to Comply:**

**Policy:**

To ensure timely and seamless completion of the FSA/CFT process, the assigned Social Worker (SW) and Social Work Supervisor (SWS) must work together to ensure that the FSA, PPR, or CFT Safety forms are completed in accordance with the procedures outlined below and if to be

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facilitated, sent to the assigned facilitator at least one business day prior to the scheduled meeting date. In the event that a meeting is held that does not require an agency facilitator, the SW, as facilitator of the process, must adhere to the procedures outlined below.

**Procedure(s) that apply:**


**In-Home Family Services Agreement**

Preparation for, and completion of, CFT meetings involving the development or review of an In-Home FSA must occur in accordance with the procedures outlined below.

**Facilitated**

Prior to the Meeting

- SW prepares for the CFT and makes an ISSI narrative data entry for all CFT preparation work. For the Subject, select FIH Case Contact: for the Custom Subject type in: Social Worker CFT Prep. Staff should document the conversations they had with the family, planning efforts, and engagement with age appropriate children.
- SW must complete the following sections of the FSA:
  - Family Demographics
  - Safety Threat (Description and objectives only; activities will be discussed during the meeting.)
  - FSA Needs: The worker should prepare the Need, Behavior, and Objective in advance (the objective is tentative and will reflect input from the family regarding the goal); activities will be discussed during the meeting.
  - Additional Services/Voluntary Services
  - Parent/Caretaker Well-Being Needs
  - Child Well-Being Needs (for each child separately)
- SW must submit the FSA to their supervisor for review 3 days prior to the CFT. For example, if the meeting is on Friday, the supervisor must get the document to the facilitator by the end of business hours on Thursday. Thus, the social worker must get the minutes to the supervisor by end of business hours on Tuesday.
- SWS must review the form for accuracy and completeness, then send the form to the assigned facilitator at least one business day prior to the scheduled meeting date. SWS must ensure that the document is named by Case Head’s Last Name, First Name and date of meeting (e.g. DoeJane 02-07-2020)
- The assigned facilitator must review the document prior to the CFT meeting and document in an ISSI narrative all preparation work. For the Subject select Admin and type in the Custom Subject: “Facilitator CFT Prep”. If there are concerns with the content or the timeframe of delivery to the facilitator, the facilitator will discuss concerns with the SWS. If the problem persists, the facilitator will discuss concerns with the manager in that district.

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### During & After the Meeting

- Facilitator must:
  - Ensure that all participants sign in on the facilitator attendance sheet.
  - Review each section of the FSA and enter all updates into the document. Ensure that all participants complete the State document signature page at the end of each meeting.
  - Print & distribute the completed document.
  - Enter a narrative in ISSI documenting the meeting occurrence. The facilitator will use the Subject: FIH Case Contact and for Custom Subject: Facilitators will type in "Facilitated CFT *type*", (e.g., Facilitated Initial FIH CFT). Facilitators will enter the primary contact and additional participants as requested by the social worker for contact credit. The facilitator will enter required information for each participant.
  - Complete the General Information Tab of the CFT node in ISSI. Under "Documentation" tab, enter the "Participants" and in "Document" enter "See Narrative – and the date".
  - The Facilitator will ensure that the document is uploaded into the shared drive.
- Social worker will inform the facilitator which participants need to be entered as a participant in the ISSI narrative section. This is optional on the social worker's part, but must be done if they desire credit for a case contact on relevant data reports. The Social Worker should not do a duplicate narrative entry noting contacts.
- Social worker must submit a printed copy to their assigned supervisor for review and signature then scan the document and all support documents completed during the meeting into On-Base.
- For all subsequent CFT meetings, SW must open the original document in the Shared Drive (DoeJane 12-25-2020) and "save as" the new document using the new CFT date after the case head (e.g. DoeJane 02-12-2020). All modifications must be made in the new document, leaving the original unchanged.
- Should a meeting cancel, the facilitator will enter a narrative entry and complete the CFT node, General Information page including CFT cancelled "yes" button, reason for CFT cancelled drop down (and Other explanation) and a brief cancellation narrative. The participants in the CFT node will **Not** be filled in at this time.

### **Social Worker Acting as Facilitator**

#### Prior to the Meeting

- SW prepares for the CFT and makes an ISSI narrative data entry for all CFT preparation work. For the Subject, select FIH Case Contact: for the Custom Subject type in: Social



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Worker CFT Prep. Staff should document the conversations they had with the family, planning efforts, and engagement with age appropriate children.

- SW must complete the following sections of the FSA:
  - Family Demographics
  - Safety Threat (Description and objectives only; activities will be discussed during the meeting.)
  - FSA Needs: The worker should prepare the Need, Behavior, and Objective in advance (the objective is tentative and will reflect input from the family regarding the goal); activities will be discussed during the meeting.
  - Additional Services/Voluntary Services
  - Parent/Caretaker Well-Being Needs
  - Child Well-Being Needs (for each child separately)
- SW must submit the FSA to their supervisor for review. SW must submit the FSA to their supervisor for review 3 days prior to the CFT. For example, if the meeting is on Friday, the supervisor must get the document back to the worker by the end of business hours on Thursday. Thus, the social worker must get the minutes to the supervisor by end of business hours on Tuesday.
- SWS must review the form for accuracy and completeness, then send the form back to the worker at least one business day prior to the scheduled meeting date. SWS must ensure that the document is named by Case Head's Last Name, First Name and date of meeting (e.g. DoeJane 02-07-2020)

#### During & After the Meeting

- SW must:
  - Ensure that all participants sign in on the facilitator attendance sheet.
  - Review each section of the FSA and enter all updates into the document
  - Ensure that all participants complete the State document signature page at the end of each meeting document.
  - Print & distribute the completed document.
  - Enter a narrative in ISSI documenting the meeting occurrence. Social worker will use the Subject: FIH Case Contact and for Custom Subject: Social Worker will type in "Social Worker-led [insert CFT type], e.g., Social worker-led Initial FIH CFT. Social Worker will enter the primary contact and additional participants for which they want to document contacts for relevant data reports (additional participants is optional in this section, but credit for contacts will only be given on reports for names entered). Social Worker will enter required information for each participant.
  - Regarding the CFT Node in ISSI, Social Worker will complete the first "General Information" tab. Under "Documentation" tab, Social Worker will enter the "Participants" (everyone one who attended – this entry is not optional) and in "Document", social worker will enter "See Narrative – and the date".



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- The worker will ensure that the document is uploaded into the shared drive.
- Social worker must submit a printed copy to their assigned supervisor for review and signature, then scan the document and all support documents completed during the meeting into On-Base.
- For all subsequent CFT meetings, SW must open the original document in the Shared Drive (e.g. DoeJane 12-25-2020) and "save as" the new document using the new CFT date after the case head (e.g. DoeJane 02-12-2020). All modifications must be made in the new document, leaving the original unchanged.
- Should a meeting cancel, Social Worker will enter a narrative entry in ISSI and complete the CFT node, General Information page including CFT cancelled "yes" button, Reason CFT Cancelled drop down (and Other explanation) and a brief Cancellation Narrative. The participants in the CFT node will **Not** be filled in at this time.

### **Permanency Planning Review & Family Services Agreement**


Preparation for, and completion of, CFT meetings involving the development or review of an out-of-home FSA and/or PPR must occur in accordance with the procedures outlined below.

### **Facilitated**

#### Prior to the Meeting

- SW prepares for the CFT and makes an ISSI narrative data entry for all CFT preparation work. For the Subject, select PPL Case Contact: for the Custom Subject type in: Social Worker CFT Prep. Staff should document the conversations they had with the family, planning efforts, and engagement with age appropriate children.
- SW must complete the following sections of the FSA:
  - Family Demographics
  - FSA Needs: The worker should prepare the Need, Behavior, and Objective in advance (the objective is tentative and will reflect input from the family regarding the goal); activities will be discussed during the meeting.
  - Parent/Caretaker Well-Being Needs
  - Court
- SW must complete the following sections of the PPR for each child
  - Family Demographics.
  - Child / Youth Status
  - Child / Youth Placement
  - Child / Youth Permanency Plan
  - Court
- SW must submit the FSA /PPR to their supervisor for review. SW must submit the FSA to their supervisor for review 3 days prior to the CFT. For example, if the meeting is on Friday, the supervisor must get the document to the facilitator by the end of business




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hours on Thursday. Thus, the social worker must get the minutes to the supervisor by end of business hours on Tuesday.

- SWS must review the form for accuracy and completeness, then send the form to the assigned facilitator at least one business day prior to the scheduled meeting date. SWS must ensure that the document is named by Case Head's Last Name, First Name and date of meeting (e.g. DoeJane 02-07-2020)
- The assigned facilitator must review the document prior to the CFT meeting and document all preparation work in ISSI and for the Subject select Admin and type in the Custom Subject: Facilitator CFT Prep. If there are concerns with the content or the timeframe of delivery to the facilitator, the facilitator will discuss concerns with the SWS. If the problem persists, the facilitator will discuss concerns with the manager in that district.

#### During & After the Meeting

- Facilitator must:
  - Ensure that all participants sign in on the facilitator attendance sheet.
  - Review each section of the FSA / PPR and enter all updates into the document. Ensure that all participants complete the State document signature page at the end of each meeting.
  - Print & distribute the completed document.
  - Enter a narrative in ISSI documenting the meeting occurrence. The facilitator will use the Subject: PPL Case Contact and for Custom Subject: Facilitators will type in CFT type, (e.g., Facilitated Initial PPL CFT). Facilitators will enter the primary contact and additional participants as requested by the social worker for contact credit. The facilitator will enter required information for each participant.
  - Complete the first General Information Tab of the CFT node in ISSI. Under "Documentation" tab, enter the "Participants" and in "Document" enter "See Narrative – and the date".
    - The Facilitator will ensure that the document is uploaded into the shared drive.
- Social worker will inform the facilitator which participants need to be entered as a participant in the ISSI narrative section. This is optional on the social worker's part, but must be done if they desire credit for a case contact on relevant data reports. The Social Worker should not do a duplicate narrative entry noting contacts.
- Social worker must submit a printed copy to their assigned supervisor for review and signature then scan the document and all support documents completed during the meeting into On-Base.
- For all subsequent CFT meetings, SW must open the original document in the Shared Drive (e.g. DoeJane 12-25-2020) and "save as" the new document using the new CFT date after the case head (e.g. . DoeJane 02-12-2020). All modifications must be made in the new document, leaving the original unchanged.

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- Should a meeting cancel, Facilitator will enter a narrative entry in ISSI and complete the CFT node, General Information page including CFT cancelled “yes” button, Reason CFT Cancelled drop down (and Other explanation) and a brief Cancellation Narrative. The participants in the CFT node will **Not** be filled in at this time.

## Social Worker Acting as Facilitator

### Prior to the Meeting

- SW prepares for the CFT and makes an ISSI narrative data entry for all CFT preparation work. For the Subject, select PPL Case Contact: for the Custom Subject type in: Social Worker CFT Prep. Staff should document the conversations they had with the family, planning efforts, and engagement with age appropriate children.
- SW must complete the following sections of the FSA:
  - Family Demographics
  - FSA Needs: The worker should prepare the Need, Behavior, and Objective in advance (the objective is tentative and will reflect input from the family regarding the goal); activities will be discussed during the meeting.
  - Parent/Caretaker Well-Being Needs
  - Court
- SW must complete the following sections of the PPR for each child
  - Family Demographics.
  - Child / Youth Status
  - Child / Youth Placement
  - Child / Youth Permanency Plan
  - Court
- SW must submit the FSA /PPR to their supervisor for review SW must submit the FSA to their supervisor for review 3 days prior to the CFT. For example, if the meeting is on Friday, the supervisor must get the document back to the worker by the end of business hours on Thursday. Thus, the social worker must get the minutes to the supervisor by end of business hours on Tuesday.
- SWS must review the form for accuracy and completeness, then send the form back to the SW at least one business day prior to the scheduled meeting date. SWS must ensure that the document is named by Case Head’s Last Name, First Name and date of meeting (e.g. DoeJane 02-07-2020)

### During & After the Meeting

- SW must:
  - Ensure that all participants sign in on the facilitator attendance sheet.
  - Review each section of the FSA / PPR and enter all updates into the document. Ensure that all participants complete the State document signature page at the end of each meeting.





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- Print & distribute the completed document.
- Enter a narrative in ISSI documenting the meeting occurrence. Social worker will use the Subject: PPL Case Contact and for Custom Subject: Social Worker will type in Social Worker-led [insert CFT type], e.g., Social Worker-led Initial Foster Care CFT. Social Worker will enter the primary contact and additional participants for which they want to document contacts for relevant data reports (additional participants is optional in this section, but credit for contacts will only be given on relevant reports for names entered). Social Worker will enter required information for each participant.
- Regarding the CFT Node in ISSI, Social Worker will complete the first "General Information" tab. Under "Documentation" tab, Social Worker will enter the "Participants" (everyone one who attended – this entry is not optional) and in "Documentations" tab, social worker will enter "See Narrative – and the date".
  - The SW will ensure that the document is uploaded into the shared drive.
- Social worker must submit a printed copy to their assigned supervisor for review and signature then scan the document and all support documents completed during the meeting into On-Base.
- For all subsequent CFT meetings, SW must open the original document in the Shared Drive (e.g. DoeJane 12-25-2020) and "save as" the new document using the new CFT date after the case head (e.g. DoeJane 02-12-2020). All modifications must be made in the new document, leaving the original unchanged.
- Should a meeting cancel, Social Worker will enter a narrative entry in ISSI and complete the CFT node, General Information page including CFT cancelled "yes" button, Reason CFT Cancelled drop down (and Other explanation) and a brief Cancellation Narrative. The participants in the CFT node will **Not** be filled in at this time.

### **Investigative Child & Family Team Safety Planning**

Preparation for, and completion of, pre-custody CFT meetings must occur in accordance with the procedures outlined below.


### **Facilitated CFT Safety Planning**

#### Prior to the Meeting

- Facilitator will document the Demographics section.

#### During and After the Meeting

- Facilitator must ensure that all meeting participants sign in, record the meeting within the Safety Planning document, print and distribute copies upon completion of the meeting, ensure that all participants complete the State document signature page at the end of each meeting document.

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- Facilitator will enter a narrative in ISSI documenting the meeting occurrence. The facilitator will use the Subject: Admin and for Custom Subject: (e.g., Facilitated Pre-Custody CFT).
- Complete the first General Information Tab of the CFT node in ISSI. Under "Documentation" tab, enter the "Participants" and in "Document" enter "See Narrative – and the date".
- Facilitator will upload the document to the shared drive.
- SW must scan the completed document and support documents completed into On-Base.
- Should a meeting cancel, Facilitator will enter a narrative entry in ISSI and complete the General Information page including CFT cancelled "yes" button, Reason CFT Cancelled drop down (and Other explanation) and a brief Cancellation Narrative. The facilitator will then document the participants in the CFT node.


### **Worker Facilitated CFT Safety Planning**

#### Prior to the Meeting

- Social Worker will document the Demographics section.

#### During and After the Meeting

- Social Worker must ensure that all meeting participants sign in, record the meeting within the Safety Planning document, print and distribute copies upon completion of the meeting, ensure that all participants complete the State document signature page at the end of each meeting document.
- Social Worker will document the meeting in the Investigative On-Going Contacts. Social Worker will add the Name of Primary Contact from the dropdown box. Social Worker will use the "Other Contact" field to name the meeting "Social Worker led, case planning CFT". Social worker will fill in all other fields and add additional participants. Social Worker will cut and paste the CFT Safety Planning document into the text box – "Documentation of Contact".
- Social Worker will complete the first General Information Tab of the CFT node in ISSI. Under "Documentation" tab, enter the "Participants" and in "Document" enter "See Narrative – and the date".
- SW must scan the completed document and support documents completed into On-Base and upload the document in the Shared Drive.
- Should a meeting cancel, Social Worker will enter a narrative entry in ISSI and complete the CFT node, General Information page including CFT cancelled "yes" button, Reason CFT Cancelled drop down (and Other explanation) and a brief

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Cancellation Narrative. Social Worker will then document the participants in the CFT node.

**Form(s) that apply:**

- NC In-Home Family Services Agreement (DSS 5239)
- NC Permanency Planning Review (DSS 5241)
- NC Out of Home Family Services Agreement(DSS 5240)
- NC Child & Family Team Safety Planning

**Reference(s):**

NC Modified Manual for Intake, Assessments, & Permanency Planning (updated 6/15/18)

**Policies:**

**Contact(s):**

Senior Social Services Managers (Pre-Custody, Post-Custody, & Resource Development)  
Policy & Practice Model Supervisor

**Policy History:**

Developed 9/1/20.