

## SBC Implementation Task List for Caseworkers

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**NOTE:** Although this task list is structured sequentially around each case, in actuality you will be overlapping cases. In other words, once you are under way, you might be doing a specific Action Plan with Case #1, at the same time you are just starting Case #2 or #3. The list is structured this way so that you and your supervisor can track each step or Milestone of EACH of the 3 Designated SBC cases to ensure you are given the support you need to learn each step well, with each case. This list is long, but it is basically just the Case Consultation tasks and then the same list of tasks repeated three times for each of your three Designated SBC Cases. Have fun with it and share “things that worked” with your colleagues in your agency .....and nationally through the FORUM on the SBC website!

### CASE CONSULTATION TASKS

#### Task 1: Attend CASE CONSULTATION<sup>1</sup> and Present 1<sup>st</sup> Case

- Attend weekly team CASE CONSULTATIONS as scheduled (typically about 3-4 months) and present (at least) two existing Cases during this period. Mark this task complete after presenting your FIRST case to the team in a CASE CONSULTATION meeting.

#### Task 2: Intro to CASEWORKER SKILLS CHECKLIST

- After presenting one of your existing Cases in CASE CONSULTATION, meet with your Supervisor to process what was learned and seek assistance on areas not clear. Fill out the PROFESSIONAL DEVELOPMENT ASSISTANCE form and share it with your Supervisor. Then review the SBC CASEWORKER: CERTIFICATIONS SKILLS CHECKLIST so that you are familiar with the skills you will be learning and demonstrating through the IMPLEMENTATION and CERTIFICATION period.

#### Task 3: Accept your 1st SBC DESIGNATED CASE

- After presenting the 1st time in a CASE CONSULTATION, select a new (or relatively new) case as your first designated SBC case to use SBC from the beginning and focus on specific skill development. Review Task 1 in the next section of tasks (labeled FIRST CASE MILESTONE). Your first goal is to learn to how to 1) build a consensus, and 2) plan generally how to proceed (FLO's and ILO's). Your first case should be assigned by (*date chosen by your agency*); you may be using the SBC concepts in many if not all of your cases, but a DESIGNATED SBC case is one in which you specifically work from an SBC perspective from the beginning to end and will be evaluated on it later for CERTIFICATION.

#### Task 4: Attend CASE CONSULTATION and Present a 2<sup>nd</sup> Time

- After presenting one of your cases a 2<sup>nd</sup> in CASE CONSULTATION, again meet with your Supervisor to process what you have learned to date and seek assistance on areas not clear. Again, fill out the PROFESSIONAL DEVELOPMENT ASSISTANCE form and review it with your Supervisor. Go over the SBC CASEWORKER: CERTIFICATIONS SKILLS CHECKLIST with your Supervisor to reassess current skill development in Skills 1-8.

#### Task 5: Enter CASE CONSULTATION TASKS completion in SBC Implementation Site

- After completing all the above tasks, go to [www.sbcimplementation.com](http://www.sbcimplementation.com) (TASKS TAB) and click **CASE CONSULTATION TASKS**, Congratulations!

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<sup>1</sup> Definitions of words that are CAPITALIZED appear in the SBC Glossary of Terms.

## FIRST CASE TASKS

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### Task 1: Review Assessment (BEFORE meeting with the family)

- Meet with your Supervisor and review the Assessment referral information PRIOR to meeting with the family. Identify safety issues, developmental challenges, and likely outcomes (future objectives) upon which to build a Consensus. Use this opportunity to practice doing a potential CONSENSUS SUMMARY with your Supervisor. Consider asking your Supervisor to join the meeting if you think you might need help with building a consensus this first time. (Review TRACKING, NORMALIZING, INTENTIONS vs. ACTIONS, and EXCEPTIONS techniques)

### Task 2: Review how the meeting went after that first family meeting

- Meet with Supervisor **after** the first family meeting to process how it went and where you are with the family regarding a working CONSENSUS. Be sure to practice writing out the CONSENSUS SUMMARY before the meeting so that it is easier to reinforce the consensus verbally in the FTM. Ask for assistance from your Supervisor in preparing for your first FTM to create a CASE PLAN (FAMILY AGREEMENT) with the family.

*[Once you have a good CONSENSUS built with the family about the family and individual issues, and what to do about them, you have reached **MILESTONE 1**]*

### Task 3: Plan your first FAMILY TEAM MEETING (FTM) to create a CASE PLAN

- When your FIRST SBC designated case is ready for an FTM to complete a CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor PRIOR to the FTM to review Case Planning basics (e.g. how to convey the consensus summary, how to write an outcome, how to write initial case plan tasks, and how to convey hope). Make sure you are clear which items are FAMILY LEVEL OBJECTIVES and which are INDIVIDUAL LEVEL OBJECTIVES, and which ones (family or individual) don't rise to the level of an objective. Ask your Supervisor for help with this SORTING of issues if you need it. Depending on the case, you may also use this meeting as an opportunity to get one or more of the specific ACTION PLANS started. IF that is a possibility, talk to your Supervisor about how that might go so you are prepared for that option. See SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, Skills 1-8 for reference and the FACILITATOR'S GUIDE TO FAMILY TEAM MEETINGS.

### Task 4: Conduct the FTM and complete the CASE PLAN

- Conduct the FTM on your first DESIGNATED SBC CASE and help the family complete the CASE PLAN (FAMILY AGREEMENT) that reflects the assessed need that is summarized in the CONSENSUS SUMMARY. Talk to the family about the how their new specific Action Plans might be developed. Depending on the case, you may also use this first FTM as an opportunity to get one or more of the specific ACTION PLANS started.

*[Once you and the family have written your outcomes (objectives), and have a completed a CASE PLAN, you have reached **MILESTONE 2**]*

Task 5: Ensuring that the specific ACTION PLAN(s) gets created.

- When your first case has completed the CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor and discuss how to best ensure that the specific ACTION PLAN(s) will get generated. Discuss whether you will assist the family with creating the ACTION PLAN or a treatment provider. IF a treatment provider, discuss how to ensure that the provider gets started in a focused way on CASE PLAN objectives, and how will you get a copy of the specific ACTION PLAN(s).

Task 6: Provide a copy of the specific ACTION PLAN(s) to your Supervisor

- Once an initial ACTION PLAN has been completed, meet with your Supervisor to go over the plans appropriateness and completeness (e.g. *Can it be documented with the help of others? Is it focused on the objectives? Does it need some help with editing?*), and then strategize how you might follow through with supportive encouragement of the client's small steps of progress.

*[Once you have assisted the family in developing written specific ACTION PLAN(s), you have reached **MILESTONE 3**]*

Task 7: Documenting and Celebrating ACTION PLAN Progress

- Report back to the Supervisor the steps you have taken to notice progress, and **document** the small steps of change. Discuss with your Supervisor Skills 9-12 of the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST. Contract to focus on the skills where you are not yet comfortable or proficient.

Task 8: Planning Actions of Celebration

- Meet with your supervisor to brainstorm how to benefit from documented progress by celebrating the small steps of change. Plan at least one action of celebration of progress/movement with this case, and include your supervisor if possible.

Task 9: Increase the Audience for Change by including your Supervisor and Coach

- Plan at least one action of celebration of progress/movement with your client, and important others such as family members, other providers, your Supervisor, and your Coach in attendance.

*[Once you have reached the point where you are regularly documenting celebrating the family's progress on their ACTION PLAN(s), you have reached **MILESTONE 4** in this case]*

Task 10: Review your Progress in Learning SBC

- After this FIRST case shows some documented progress, meet with your Supervisor to review you skills in documentation and celebration. Your Supervisor will use the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, (Skills 12-16) to help you keep track of your progress.

Task 11: First Case Milestone in SBC IMPLEMENTATION SITE

- Your case may still be active, however, after completing all the above tasks with THIS case, go to [www.sbcimplementation.com](http://www.sbcimplementation.com) (TASKS TAB) and click **FIRST CASE MILESTONE**, Congratulations!

## SECOND CASE TASKS

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### Task 1: Accept 2<sup>nd</sup> Designated SBC CASE

- Once you and your Supervisor feel that you are making progress in building a CONSENSUS with the family and can summarize that consensus verbally when you need to, ask for and accept a second SBC case so that you can continue to practice these skills (typically within a month of accepting your first SBC DESIGNATED Case).

### Task 2: Review Assessment (BEFORE meeting with the family)

- Meet with your Supervisor and review the Assessment referral information PRIOR to meeting with the family. Identify safety issues, developmental challenges, and likely outcomes (future objectives) upon which to build a Consensus. Use this opportunity to practice doing a potential CONSENSUS SUMMARY with your Supervisor. (Review TRACKING, NORMALIZING, and EXCEPTIONS techniques)

### Task 3: Review how the meeting went after that first family meeting

- Meet with Supervisor **after** the first family meeting to process how it went and where you are with the family regarding a working CONSENSUS. Be sure to practice writing out the CONSENSUS SUMMARY before the meeting so that it is easier to reinforce the consensus verbally in the FTM. Ask for assistance from your Supervisor in preparing for your FTM to create a CASE PLAN (FAMILY AGREEMENT) with the family.

*[Once you have a good CONSENSUS built with the family about the family and individual issues, and what to do about them, you have reached **MILESTONE 1**]*

### Task 4: Plan your FAMILY TEAM MEETING (FTM) to create a CASE PLAN

- When your second SBC designated case is ready for an FTM to complete a CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor PRIOR to the FTM to review Case Planning basics (e.g. how to convey the consensus summary, how to write an outcome, how to write initial case plan tasks, and how to convey hope). Make sure you are clear which items are FAMILY LEVEL OBJECTIVES and which are INDIVIDUAL LEVEL OBJECTIVES, and which ones (family or individual) don't rise to the level of an objective. Ask your Supervisor for help with this SORTING of issues if you need it. Depending on the case, you may also use this meeting as an opportunity to get one or more of the specific ACTION PLANS started. IF that is a possibility, talk to your Supervisor about how that might go so you are prepared for that option. See SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, Skills 1-8 for reference and the FACILITATOR'S GUIDE TO FAMILY TEAM MEETINGS.

### Task 5: Conduct the FTM and complete the CASE PLAN

- Conduct the FTM on your second DESIGNATED SBC CASE and help the family complete the CASE PLAN (FAMILY AGREEMENT) that reflects the assessed need that is summarized in the CONSENSUS SUMMARY. Talk to the family about the how their new specific Action Plans might be developed. Depending on the case, you may also use this first FTM as an opportunity to get one or more of the specific ACTION PLANS started.

*[Once you and the family have written your outcomes (objectives), and have a completed a CASE PLAN, you have reached **MILESTONE 2**]*

Task 6: Ensuring that the specific ACTION PLAN(s) gets created.

- When your second case has completed the CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor and discuss how to best ensure that the specific ACTION PLAN(s) will get generated. Discuss whether you will assist the family with creating the ACTION PLAN or a treatment provider. IF a treatment provider, discuss how to ensure that the provider gets started in a focused way on CASE PLAN objectives, and how will you get a copy of the specific ACTION PLAN(s).

Task 7: Provide a copy of the specific ACTION PLAN(s) to your Supervisor

- Once the initial ACTION PLAN(s) have been completed, meet with your Supervisor to go over the plans appropriateness and completeness (e.g. *Can they be documented with the help of others? Are they focused on the objectives? Do they need some help with editing?*), and then strategize how you might follow through with supportive encouragement of the client's small steps of progress.

*[Once you have assisted the family in developing written specific ACTION PLAN(s), you have reached **MILESTONE 3**]*

Task 8: Documenting and Celebrating ACTION PLAN Progress

- Report back to the Supervisor the steps you have taken to notice progress, and **document** the small steps of change. Discuss with your Supervisor Skills 9-12 of the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST. Contract to focus on the skills where you are not yet comfortable or proficient.

Task 9: Planning Actions of Celebration

- Meet with your supervisor to brainstorm how to help the family benefit from documented progress by celebrating the small steps of change. Plan at least one action of celebration of progress/movement with this case, and include your supervisor if possible.

Task 10: Increase the Audience for Change by including your Supervisor and Coach

- Plan at least one action of celebration of progress/movement with your client, and important others such as family members, other providers, your Supervisor, and your Coach in attendance.

*[Once you have reached the point where you are regularly documenting celebrating the family's progress on their ACTION PLAN(s), you have reached **MILESTONE 4**]*

Task 10: Review your Progress in Learning SBC

- After this second case shows some documented progress, meet with your Supervisor to review you skills in documentation and celebration. Your Supervisor will use the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, (Skills 13-16) to help you keep track of your progress.

Task 11: Second Case Milestone in SBC IMPLEMENTATION SITE

- Your case may still be active, however, after completing all the above tasks with THIS case, go to [www.sbcimplementation.com](http://www.sbcimplementation.com) (TASKS TAB) and click **SECOND CASE MILESTONE**, Congratulations!

## THIRD CASE TASKS

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### Task 1: Accept 3<sup>RD</sup> Designated SBC CASE

- Once you and your Supervisor feel that you are making progress in CASE PLANNING, as well as getting a family started on specific ACTION PLANS, then ask for and accept a third DESIGNATED SBC CASE so that you can continue to practice these skills (typically well within 2 months of getting your first SBC designated case).

### Task 1: Review Assessment (BEFORE meeting with the family)

- Meet with your Supervisor and review the Assessment referral information PRIOR to meeting with the family. Identify safety issues, developmental challenges, and likely outcomes (future objectives) upon which to build a Consensus. Use this opportunity to practice doing a potential CONSENSUS SUMMARY with your Supervisor. (Review TRACKING, NORMALIZING, and EXCEPTIONS techniques)

### Task 2: Review how the meeting went after that first family meeting

- Meet with Supervisor **after** the first family meeting to process how it went and where you are with the family regarding a working CONSENSUS. Be sure to practice writing out the CONSENSUS SUMMARY before the meeting so that it is easier to reinforce the consensus verbally in the FTM. Ask for assistance from your Supervisor in preparing for your FTM to create a CASE PLAN (FAMILY AGREEMENT) with the family.

*[Once you have a good CONSENSUS built with the family about the family and individual issues, and what to do about them, you have reached **MILESTONE 1**]*

### Task 3: Plan the FAMILY TEAM MEETING (FTM) to create a CASE PLAN

- When your third SBC designated case is ready for an FTM to complete a CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor PRIOR to the FTM to review Case Planning basics (e.g. how to convey the consensus summary, how to write an outcome, how to write initial case plan tasks, and how to convey hope). Make sure you are clear which items are FAMILY LEVEL OBJECTIVES and which are INDIVIDUAL LEVEL OBJECTIVES, and which ones (family or individual) don't rise to the level of an objective. Ask your Supervisor for help with this SORTING of issues if you need it. Depending on the case, you may also use this meeting as an opportunity to get one or more of the specific ACTION PLANS started. IF that is a possibility, talk to your Supervisor about how that might go so you are prepared for that option. See SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, Skills 1-8 for reference and the FACILITATOR'S GUIDE TO FAMILY TEAM MEETINGS.

### Task 4: Conduct the FTM and complete the CASE PLAN

- Conduct the FTM on your third DESIGNATED SBC CASE and help the family complete the CASE PLAN (FAMILY AGREEMENT) that reflects the assessed need that is summarized in the CONSENSUS SUMMARY. Talk to the family about the how their new specific Action Plans might be developed. Depending on the case, you may also use this first FTM with the family as an opportunity to get one or more of the specific ACTION PLANS started.

*[Once you and the family have written your outcomes (objectives), and have a completed a CASE PLAN, you have reached **MILESTONE 2**]*

Task 5: Ensuring that the specific ACTION PLAN(s) gets created.

- When your first case has completed the CASE PLAN (FAMILY AGREEMENT), meet with your Supervisor and discuss how to best ensure that the specific ACTION PLAN(s) will get generated. Discuss whether you will assist the family with creating the ACTION PLAN or a treatment provider. IF a treatment provider, discuss how to ensure that the provider gets started in a focused way on CASE PLAN objectives, and how will you get a copy of the specific ACTION PLAN(s).

Task 6: Provide a copy of the specific ACTION PLAN(s) to your Supervisor

- Once an initial ACTION PLAN has been completed, meet with your Supervisor to go over the plans appropriateness and completeness (e.g. *Can it be documented with the help of others? Is it focused on the objectives? Does it need some help with editing?*), and then strategize how you might follow through with supportive encouragement of the client's small steps of progress.

*[Once you have assisted the family in developing written specific ACTION PLAN(s), you have reached **MILESTONE 3**]*

Task 7: Documenting and Celebrating ACTION PLAN Progress

- Report back to the Supervisor the steps you have taken to notice progress, and **document** the small steps of change. Discuss with your Supervisor Skills 9-12 of the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST. Contract to focus on the skills where you are not yet comfortable or proficient.

Task 8: Planning Actions of Celebration

- Meet with your supervisor to brainstorm how benefit from documented progress by celebrating the small steps of change. Plan at least one action of celebration of progress/movement with this case, and include your supervisor if possible.

Task 9: Increase the Audience for Change by including your Supervisor and Coach

- Plan at least one action of celebration of progress/movement with your client, and important others such as family members, other providers, your Supervisor, and your Coach in attendance.

*[Once you have reached the point where you are regularly documenting celebrating the family's progress on their ACTION PLAN(s), you have reached **MILESTONE 4**]*

Task 10: Review your Progress in Learning SBC

- After this FIRST case shows some documented progress, meet with your Supervisor to review you skills in documentation and celebration. Your Supervisor will use the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST, (Skills 13-16) to help you keep track of your progress.

Task 11: Third Case Milestone in SBC IMPLEMENTATION SITE

- Your case may still be active, however, after completing all the above tasks with THIS case, go to [www.sbcimplementation.com](http://www.sbcimplementation.com) (TASKS TAB) and click **THIRD CASE MILESTONE**, Congratulations!

## CERTIFICATION PROCESS

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NOTE: Although 3 cases is the minimum number of cases that can serve as the focus of practice during the implementation period, additional cases may be added to the review when the Supervisor feels it important for the Caseworker to get more practice. Sometimes a case will not work out as a practice case, or some workers may feel more comfortable with getting more practice. The focus should be on the learning objectives, and if it takes another case or two to achieve the desired skill acquisition, then that should be encouraged.

### Task 1: Request Case File Review

- Request a CASE FILE REVIEW when you have accomplished every task in your Checklist and your Supervisor has rated you as Proficient or better on every skill on the SBC CASEWORKER: CERTIFICATION SKILLS CHECKLIST.

### Task 2: Announce Certification Accomplishment

- Once you hear that *Social Services Associates, LLC* has approved your Certification in SBC Casework, check this task as SUCCESSFUL.

### Task 3: Enter this Milestone in SBC Implementation Site

- After completing all the above tasks, go to [www.sbcimplementation.com](http://www.sbcimplementation.com) (TASKS TAB) and click **CERTIFICATION MILESTONE** Congratulations! You have accomplished the entire Implementation and Certification Process!! THANK YOU!!