Family Assessment & FACT Protocol

Procedure Title	Family Assessment Protocol
Store Front Office (SFO) Contacts	Engagement Specialists and Branch Operation Managers of Family Coaches
Revised Effective Date	March 11th, 2024
Purpose	Provide state-wide guidance for Family Assessment conversations and Family Assessment Collection Tool (FACT) entries. Family Assessment & FACT Protocol flow chart.
Goal	The protocol can act as a quick-reference document. Provides consistent offerings of Family Assessments to families and FACT entries based on those conversations.
Related Policy	Transmittals: SS-IM-18-010, SS-AR-18-005, and SS-AR-18-004.
Procedure	N/A – There are variations at the direct service level. Refer to local area SFO contacts.
Initial Setup Requirements	Those who will be offering Family Assessments and making FACT entries complete the self-paced Workday Learning training series: (To be taken in order) – Click to begin 1. Family Assessment Fundamentals Part 1: Guiding Philosophies 2. Family Assessment Fundamentals Part 2: Tools Overview 3. Family Assessment in Practice Part 1: Strengths and Questions 4. Family Assessment in Practice Part 2: Phases of Assessment 5. Family Assessment Collection Tool (FACT) After training, individuals check that they have access to FACT or request access and order a physical Family Assessment Tool Kit if they do not already have one.

WHO		WHAT	LINKS & DIRECTIONS
1	Family Coach or Engagement Specialist	• Introduce the Family Assessment to the participant. This is about starting a conversation and relationship-building.	• The offer is to be made within 90 days of TANF opening and at or after an eligibility redetermination. Family Assessment conversations ideally continue and grow outside the required times to offer the opportunity. • Participants are to be offered opportunities to talk about all four domains within the Family Assessment – Family Stability, Well-being, Education, and Workplace. The participant is in control of what is to be discussed. If they choose not to go over a domain, we honor the participant's choice. • The Family Assessment may be offered in-person or virtually. • If you are unable to introduce the Family Assessment to the participant, do the following: o Narrate the reasons why in TRACS, and plan to revisit at a future date. • The Family Assessment conversation(s) can be had over multiple sessions. It is entirely dependent on participant preference. There is no requirement for all domains to be discussed within one visit. Conversations ideally are ongoing and evolve as things change for the participant. • The Family Assessment is a living tool, meaning it is never

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			"complete". It's as complete as the participant wants it to be. Domains can always be revisited. • Can meet outside of the office at the preferred time and location of the participant to have Family Assessment conversations. These can also be done virtually. • If two parent household, offer Family Assessment conversations to both participants. Offer the option of providing the assessment together or separately.
2	Family Coach and Engagement Specialist	• Offer the assessment cards and the Family Assessment form 7823C. The participant makes the decision as to which format works best for them. Explain: • What the Family Assessment is. • That this will be an ongoing conversation, and this is just the start. ○ Keep in mind that this is participant driven, so length of time is as	• If participant declines the Family Assessment, ask them what areas of their life they would like to discuss, review or have supports for. Continue to engage with the family on their goals, etc.

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		much time as they want to spend. You'll get through what you can in the amount of time you have for each meeting. ○ Remember the participant chooses how we proceed and how far we take conversations.	
3	Family Coach and Engagement Specialist	• During the assessment conversation empower the participant to establish goals for themselves or family. ○ Based on their goals a personal development plan will be made in TRACS.	• Ask participants for their preference on frequency, method, and location for ongoing conversations about their goals. Connect with the participant as often as needed, but no less than monthly. • Highlight strengths, celebrate successes, as well as discuss concerns or challenges. Relate strengths to accomplishing their goals. • If a participant identifies only one domain (area of life) that is important to them, work on addressing that one domain with them. All domains do not have to be worked on. Some goals will overlap between domains.

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			• If a participant wants to work on multiple goals, work with the participant to prioritize them. • Where there are areas of concern, even if it is not one of their identified goals, offer the opportunity to have conversations. Be mindful of where the relationship with the participant is currently when sharing your concerns. • Maintain integrity of the relationship by fostering rapport with every conversation. Every conversation is an opportunity to strengthen the relationship. • See the self-paced Workday Learning to support interactions with participants: DHS - SSP TRNG – Family Engagement Skills: Five Components of Skillset
4	Family Coach and Engagement Specialist	• Be collaborative and creative with participants to identify supports and resources.	• Ask the participant what they have already tried or thought about trying. • Use the "Ask, Ask, Offer, Ask" technique. • Use your team supports: Engagement Specialists, Community Partnership Coordinators, peers, managers, contractors, and community partners.
5	Family Coach and Engagement	• Complete goal plan sheet with participant.	• Each adult will develop their own goal plan. • Offer participant the opportunity to write their goal plan on

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	Specialist	• Talk about the JOBS activities that will support their goals together and any attendance verification that will be needed.	the sheet. • Use the goal plan sheet to document supports, resources, and actions. • The goal plan sheet will be used to create the Personal Development Plan (PDP/TRACS) with the participant. The PDP will support their goals through JOBS activities, support services, etc. Refer to the Family Assessment and FACT self-paced Workday Learning series for more information. Also refer to the Plan Building self-paced Workday Learning Series for TRACS PDP specifics.
6	Family Coach and Engagement Specialist	• Summarize plan and discuss next steps. • Provide any documents, etc. that the participant wants or are helpful.	• Remember to check for understanding. It is beneficial to jointly recap their goal and the identified supporting actions. • Remember to use Ask, Ask, Offer, Ask to help with the summary process. • Ask participant how they feel about their goals and plan. Adjust as needed. The plan is to be the participant's and so it needs to be a plan they're wanting to engage in. • Provide any takeaway documents, etc. Refer to the Family Assessment and FACT self-paced Workday Learning series for more information.

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			• Set a time and date to continue the Family Assessment conversation(s). Family Assessment is intended to be ongoing conversations. Things will evolve and the participants goals, supports, challenges, etc. may change overtime.
7	Family Coach and Engagement Specialist	• Enter the results of your Family Assessment conversation(s) into the Family Assessment Collection Tool (FACT) application.	• Ideally this is not done in real-time as the conversation unfolds. It is best to remain as present as possible in the conversation. Entries in real-time can be perceived as transactional. Refer to the Family Assessment and FACT self-paced Workday Learning series for more information.
8	Family Coach and Engagement Specialist	• Create and/or modify the Personalized Development Plan (PDP) in TRACS timely. • Narrate pertinent or helpful information from the Family Assessment conversation(s) using best practices. • Make any additional TRACS entries based on the conversation(s) and information provided by the participant – Example: A self-disclosed disability or limitation and accommodations offered.	• The goal plan sheet does not replace the Personal Development Plan (PDP) in TRACS. The goals identified and the conversations had will reveal what steps and supports will be put into the TRACS PDP. • There is no statewide standard TRACS narrative guide for Family Assessment conversations. A lot of the Family Assessment conversations and outcomes of will be recorded in FACT. However, narrations can provide additional details about the conversations and interactions which can be helpful. • There may be additional TRACS entries that need to be made besides just the Personal Development Plan. These could be disabilities or limitations that came up during conversation. Refer to the self-paced Workday Learning training called ODHS – SSTU – Disabilities and Limitations Overview for more information.

WHO	WHAT	LINKS & DIRECTIONS

Family Assessment and FACT Protocol Flow Chart

1. Introduce and Offer the Family Assessment
2. Participant Identifies Goals
3. Complete the Goal Sheet + Talk About the JOBS Activities that will Support the Goal(s)
4. Summarize the Plan with the Participant + Agree on a Time to Continue the Conversation
5. Enter the Results of the Family Assessment Conversation into FACT
6. Create or Update the PDP in TRACS + Make Any Other Needed TRACS Entries