Family Assessment Protocol

Procedure Title	Family Assessment Protocol
Branch Contact	Branch Operational Managers and Engagement Specialists
Revised Effective Date	May 15, 2018

Purpose	To establish a clear, effective and efficient process that supports the completion of the TANF assessment.
Goal	To provide a clear, concise guide for assisting families to complete the TANF assessment process and move towards becoming self-sufficient.
Related Policy	Transmittals: SS-IM-18-010, SS-AR-18-005, and SS-AR-18-004.
Procedure	
Initial Setup	Shared drive link needs established for assessment tracking sheet. Contact the district data coordinator.

	Who	What	Links & Directions
1	Family Coach, Engagement Specialist,	• Introduce participant to the assessment and offer the assessment conversation. This is about relationship-building.	• Offer the opportunity to have the conversation about all domains within 90 days, at redetermination, and when time allows. If unable to have the conversation, staff with

	Branch Eligibility Specialist		leadership, narrate the reasons why, and plan to revisit at a future date. • The assessment conversation may be completed in multiple sessions dependent on participant preference. Not required to complete within one visit. • Can complete/meet outside of the office at the preferred time and location of the participant. • If two parent household, offer assessment to both participants. Offer the option of providing the assessment together or separately.
2	Family Coach, Engagement Specialist, Branch Eligibility Specialist	• Offer the cards and form 7823C. The participant makes the decision as to which format works best for them. Explain: • What the assessment is. • How much time it may take. • Keep in mind that this is participant driven, so it is as much time as they want to spend on it. • Letting participant choose how they proceed.	• If participant declines the assessment, ask them what areas of their life they would like to discuss, review or have supports for.

3	Family Coach, Engagement Specialist, Branch Eligibility Specialist	During the assessment conversation empower the participant to establish their goals to support their plan.	• Ask participants for their preference on frequency, methods, and location of conversations. 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. • 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 is currently. • Maintain integrity of the relationship by fostering rapport with every conversation. Every conversation is an opportunity to strengthen the relationship. • See the iLearn module to support interactions with participants: DHS - SSP TRNG - Family Engagement Skills: Five Components of Skillset
4	Family Coach,	• Be collaborative and creative with participants to identify	• Ask the participant what they have already tried or thought about trying.

	Engagement Specialist, Branch Eligibility Specialist	supports and resources.	• 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, Engagement Specialist, Branch Eligibility Specialist	• Complete goal plan sheet with participant.	• Each parent will develop their own goal plan. • Offer participant the opportunity to write their goal plan on the sheet. • Use the goal plan sheet to document supports, resources, and the plan. • The goal plan sheet will be used to create the Personal Development Plan (PDP/TRACS) with the participant. • Set a time and date for the next conversation.
6	Family Coach, Engagement Specialist, Branch Eligibility Specialist	• Summarize plan and discuss next steps. • Provide original color copy of the goal plan sheet to participant.	• Ask the participant to explain their goal plan. • Remember to use Ask, Ask, Offer, Ask to help with the summary process. • Keep a physical copy of the goal plan and scan into EDMS agency records. • Ask participant how they feel about their plan.
7	Family Coach, Engagement	• Narrate in TRACS timely using best practice timeframes.	• The goal plan sheet does not replace the Personal Development Plan (PDP) in TRACS. • There is no statewide standard narrative guide.

	Specialist, Branch Eligibility Specialist		• Link: Sample narrative guides
8	Family Coach or Designee	• Enter data in the assessment tracking sheet weekly by noon on Thursdays.	• Link: Family Assessment Data Spreadsheet FAQ • Refer to Rationale for Family Assessment Data Capture Quick Reference Guide for background on the data capture.