

Credential AREA: Family Specialist Credential (Level 5)
TOPIC: IRE-PPD-CPD-FCR Custom Assessment Example
Family Needs Assessment and Service Plan

I. Assessment Competency & Standards Alignment

Gateways Competencies Assessed
FSC PPD1: Demonstrates professionalism in appearance, behavior, and disposition
FSC IRE2: Establishes reciprocal relationships with families, demonstrating respect for family competence and resilience
FSC CPD4: Develops, implements, and assesses—in collaboration with families—content, evidence-based programs, interventions, and family service plans developed to emphasize family strengths and support family priorities, concerns, and need
FSC PPD6: Designs and participates in collaborative systems and proactive, visionary leadership that address structural inequities in society and human service systems and support family cohesion and well-being
FSC PPD7: Designs and participates in collaborative systems and proactive, visionary leadership addresses structural inequities in society and human service systems and mitigates against family cohesion and well-being
FSC CPD5: Creates, implements, and assesses a comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments
FSC FCR6: Designs program policies and practices that promote family engagement and collaboration through the provision of meaningful engagement opportunities, involvement in decision-making processes, and demonstrating respect for family’s preferred language and modes of communication
FSC FCR7: Develops, implements, and assesses--in partnership with families and other providers—evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthens the family functioning through their ability to access and manage resources, including the family's role in parenting children

II. Assessment Task Description/ Directions

Overview: For this assessment, you will be completing a family needs assessment and creating a service plan that will address the family's needs. To complete the needs assessment, you will interview a family member from the community using the needs assessment interview included in this assessment. Once you have gathered the family's needs, you will create a service plan including how you would address the needs identified with a list of your recommendations for the family and social service providers working with the family. In addition, for this assessment, you will also write interspersed reflective pieces about your considerations for hypothetical interactions with this family.

Technology Option:

- Examples:

<https://ectacenter.org/~pdfs/knowledgepath/ifspoutcomes-iepgoals/KimCaseStudy-35mos.pdf>

https://asdtoddler.fpg.unc.edu/sites/asdtoddler.fpg.unc.edu/files/imce/documents/CaseStudy_Coaching.pdf

<p style="text-align: center;">Option 1 (for those wanting to become family specialists in the field)</p>	<p style="text-align: center;">Option 2 (for those who are already family specialists in the field)</p>
<ul style="list-style-type: none"> You will look for a volunteer to be interviewed for a mock needs assessment loosely based on real-life situations 	<ul style="list-style-type: none"> You will ask a parent/ caregiver with whom you work to participate in your needs assessment interview. Note: all information must be kept confidential and his/ her real name or any identifying names shall not be included in your write-up.

Part One: Preparation for Family Interview

In this part of the assessment, you prepare for meeting with a family member from the community to assess their family's needs. Your reflections and considerations will fall into three broad categories, including:

- Preparation for the assessment
- Appropriate professional appearance
- Interactions with the family

For each of these areas, write a reflective essay about what you are considering prior to meeting with the family/family member in order to carry yourself with the utmost of professionalism, using the ideas below as a starting point:

- Preparation for the assessment:

- When you think about preparing for the interview, what considerations are you making related to the content of the interview questions and how you will ask them, the space in which you will meet, the paperwork you will need, etc.?
- How are you preparing to address any language and/or cultural barriers that might exist between you and the family?
- In essence, how are you preparing mentally and physically for this meeting with the family?
- Appropriate professional appearance:
 - How will you dress for this interaction with a family?
 - What considerations have you made in selecting the type, style, and look of the clothing you will wear?
 - If you prefer, you can use photos or other visual means to show/demonstrate the clothing you will wear and then describe how and why you selected each piece to support your professional work with families.
- Interactions with the family:
 - When you think about meeting with this family for the interview, what are your considerations for how you will interact with them?
 - What factors will help to set your tone and approach with this family?
 - What ideas will you mentally hold and attend to in order to be present, professional, intentional, and available to them throughout your experience with them?
 - What measures will you take personally and professionally to ensure their privacy and dignity in your interactions?
 - In what specific ways will your verbal and non-verbal interactions convey honesty, integrity, respect, empathy, and professional/ emotional maturity to the family throughout your interactions?

Technology Option:
 - Video/audio record options

Part Two: Family Interview

For this part of the assessment, you will interview either a volunteer from the community for a mock assessment (Option 1) or a parent/caregiver with whom you work (Option 2) to assess the family's strengths as well as their family priorities and areas of concern/need. Please use the interview protocol at the end of this assessment to complete the family needs assessment interview.

Part Three: Family Service Plan

In this part, you will develop a service plan for this family based on what you have assessed as strengths and needs in this family's case study in Part 2 of the assessment. There are four distinct areas that you should cover in your service plan, including:

- Family strengths revealed in the case study (suggested length: a few paragraphs)
- Family priorities, concerns, and needs revealed in the case study (suggested length: a few paragraphs)

- Family recommendations (please check each area in which the family might benefit from additional services):
 - Mental health services
 - Substance abuse services
 - Family Support/ Family Education
 - Education
 - Vocational, or job training
 - Housing
 - Transportation
 - Basic Needs (food, clothing)
 - Health services
 - Legal assistance
 - Environmental Supports
 - support groups
 - peer groups
 - activities
 - community services
 - friends
 - landlords
 - cultural affiliates
 - employers
 - Financial resources
- Family Service Plan: for each area that was checked above, please provide the following information:
 - A problem/ strength statement supporting the recommendation
 - A related goal
 - A long-term desired outcome
 - The role of the family specialist in intervening in this area

Technology Option:
- Electronic form

Part Four: Reflection

For this final part of the assessment, please write a reflective essay about your experiences working with this hypothetical family to assess their needs and create a service plan for them. Please use these guiding questions to prompt your reflection:

- How did it feel to encounter this family's challenges? What was it like for you to recognize their strengths amid the challenges revealed in your assessment?

- How did your approach to this family change as you learned more about them? What emotions surfaced for you as you thought through interactions with this family?
- What do you consider to be your greatest strengths in collaborating with a family through a process like this? In what areas would you most like to grow in your interactions with families in this type of scenario?
- Had conflict arisen during your work with the family, how would you have handled it? Or if one did surface, how did you handle it?
- What did you learn about yourself as a professional in thinking through this family needs assessment process?

Technology Option:
 - Video/audio record options

III. Assessment Rubric

FS IRE-PPD-CPD-FCR Family Needs Assessment and Service Plan Level 4 Custom Rubric		
Competency	Competent	Unable to Assess
Checklist Criteria		
PPD1: Demonstrates professionalism in appearance, behavior, and disposition	Interactions & Communication...	
	listens and responds with an open mind to suggestions	
	communicates with honesty, respect, & integrity	
	addresses conflict appropriately	
	seeks and considers the opinions of others	
	demonstrates empathy	
	verbal and non-verbal language, behaviors and interactions demonstrate emotional control and maturity	
	Ethics & Responsibility...	
	protects and Maintains confidentiality	
	is dependable and responsible in time management (Present, on time, engaged, meets deadlines, responds in a timely manner)	
	is on-task, engaged & prepared	
	uses digital devices responsibly and appropriately	
	respects student and family privacy both hard copy and electronically	
	uses social media in respectful and professional ways	
	dresses professionally for context/situation	
	maintains professional interactions with staff & families	
	Reflection & Flexibility...	
seeks and uses feedback from others		
incorporates feedback in subsequent practice		

		reflects accurately regarding own strengths and weaknesses			
		adapts to unexpected or new situations			
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
IRE2: Establishes reciprocal relationships with families, demonstrating respect for family competence and resilience	Identifies qualities and characteristics supportive of reciprocal relationships with families, including demonstrating respect for family competence and resilience Demonstrates cultural competence in the enactment of these qualities and characteristics	Identifies qualities and characteristics supportive of reciprocal relationships with families Engages in interactions that demonstrate respect for family competence and resilience	Identifies limited qualities and characteristics that support reciprocal relationships with families	Provides limited or inaccurate qualities and characteristics supportive of reciprocal relationships with families Engages in interactions that undermine or lack support for family competence and/or resilience	
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
CPD4: Develops, implements and assesses--in collaboration with families--content, evidence-based programs, interventions, and family service plans developed to emphasize family strengths and support family priorities, concerns, and needs	Develops culturally and linguistically responsive family service plans that are parent/family-focused and child-focused Assesses family service plan formats and developmental processes in relation to approaches and resources that support family autonomy and addresses the family's diversity, strengths, functions, development, and transitions Develops home visit plans and parent group sessions that reflect agency purpose	Develops culturally and linguistically responsive family service plans that are parent/family-focused and child-focused Assesses family service plan formats and developmental processes in relation to approaches and resources that support family autonomy and addresses the family's diversity, strengths, functions, development, and transitions Develops home visit plans and parent group sessions that reflect agency purpose	Develops family service plans that are parent/family-focused and child-focused Assesses family service plan formats and developmental processes in relation to approaches and resources. Develops home visit plans and parent group sessions that reflect agency purpose and different family service goals and incorporate a range of strategies to establish partnerships with families	Develops incomplete or inaccurate family service plans that are parent/family-focused and child-focused Assessment of family service plan formats and developmental processes in relation to approaches and resources is incomplete or inaccurate. Develops home visit plans and parent group sessions that do not reflect agency purpose and different family service goals or incorporate a range of	

	<p>and different family service goals, incorporate a range of strategies to establish partnerships with families, maintain family engagement, engage families in reflection and autonomous decision making, ensure collaboration around specific purposes, and engages families in skill-focused strategies to address specific outcomes</p> <p>Develops parent-child group sessions that focus on the parent-child relationship, from perspective of recognizing and building competence, confidence, and resilience in parenting and facilitate carry-over and consistency among different types of intervention programs</p> <p>Assesses service coordination plans and activities from a best practice perspective of emphasizing family strengths, considering neighborhood, community, and programmatic strengths, resources, and services</p> <p>Uses current research and evidence-based practice to</p>	<p>and different family service goals, incorporate a range of strategies to establish partnerships with families, maintain family engagement, engage families in reflection and autonomous decision making, ensure collaboration around specific purposes, and engages families in skill-focused strategies to address specific outcomes</p> <p>Develops parent-child group sessions that focus on the parent-child relationship, from perspective of recognizing and building competence, confidence, and resilience in parenting and facilitate carry-over and consistency among different types of intervention programs</p> <p>Assesses service coordination plans and activities from a best practice perspective of emphasizing family strengths, considering neighborhood, community, and programmatic strengths, resources, and services</p>	<p>Develops parent-child group sessions that focus on the parent-child relationship</p> <p>Assesses service coordination plans and activities</p>	<p>strategies to establish partnerships with families</p> <p>Develops parent-child group sessions that lack focus</p> <p>Provides incomplete or inaccurate assessment of service coordination plans and activities</p>	
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	support programs, interventions, and family service plans development, implementation, and analyses				
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
PPD6: Designs and participates in collaborative systems and proactive, visionary leadership that address structural inequities in society and human service systems and support family cohesion and well-being	<p>Participates collaboratively in the design of systems supporting human services including law and policy</p> <p>Collaborates with others to guide and enhance family and child program policies and practices address structural inequities in society and human service systems</p> <p>Analyzes advocacy organization activities at local, state, and national levels for adherence to strength-based, family-centered standards and practices</p> <p>Uses research and evidence-based practice to guide system design and collaborative efforts</p>	<p>Participates collaboratively in the design of systems supporting human services including law and policy</p> <p>Collaborates with others to guide and enhance family and child program policies and practices address structural inequities in society and human service systems</p> <p>Analyzes advocacy organization activities at local, state, and national levels for adherence to strength-based, family-centered standards and practices</p>	<p>Participates in systems supporting human services including law and policy</p> <p>Participates in systems to guide and enhance family and child program policies and practices</p> <p>Analyzes advocacy organization activities at local, state, and national levels for adherence to legal mandates and designated standards</p>	<p>Does not participate in systems supporting human services including law and policy</p> <p>Collaboration with others to guide and enhance family and child program policies and practices not conducive to productivity</p> <p>Does not identify relevant points of analysis for advocacy organization activities at local, state, and national levels or their ability to adhere to strength-based, family-centered standards and practices</p>	
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
PPD7: Designs and participates in collaborative systems and proactive, visionary leadership addresses	Compares, contrasts, and evaluates sources of reliable, timely professional information on law, policy, advocacy and practices for adherence to strength-	Compares, contrasts, and evaluates sources of reliable, timely professional information on law, policy, advocacy and practices for adherence to strength-	Provides a partial comparison, contrast, and evaluation of sources of reliable, timely professional information on law, policy, advocacy and practices for	Provides an inaccurate comparison, contrast, and evaluation of sources of reliable, timely professional information on law, policy, advocacy and practices for	

<p>structural inequities in society and human service systems and mitigates against family cohesion and well-being</p>	<p>based, family-centered standards and practices. Works to mitigate inequities</p> <p>Identifies and reflects on policies and programmatic opportunities for family members to participate in leadership and policy development within and outside of a specific family service program</p> <p>Critiques written standards, policies, and program requirements of an operating family service program in comparison to legal and ethical standards, ability to support community goals, adherence to requirements, and potential for collaboration</p> <p>Identifies strategies to support others in addressing structural inequities</p>	<p>based, family-centered standards and practices. Works to mitigate inequities</p> <p>Identifies and reflects on policies and programmatic opportunities for family members to participate in leadership and policy development within and outside of a specific family service program</p> <p>Critiques written standards, policies, and program requirements of an operating family service program in comparison to legal and ethical standards, ability to support community goals, adherence to requirements, and potential for collaboration</p>	<p>adherence to strength-based, family-centered standards and practices. Works to mitigate inequities</p> <p>Identifies policies and programmatic opportunities for family members to participate in leadership and policy development within and outside of a specific family service program</p> <p>Summarizes written standards, policies, and program requirements of an operating family service program in comparison to legal and ethical standards, ability to support community goals, adherence to requirements, and potential for collaboration</p>	<p>adherence to strength-based, family-centered standards and practices. Works to mitigate inequities</p> <p>Identifies inappropriate policies and programmatic opportunities for family members to participate in leadership and policy development within and outside of a specific family service program</p> <p>Incorrectly summarizes written standards, policies, and program requirements of an operating family service program in comparison to legal and ethical standards, ability to support community goals, adherence to requirements, and potential for collaboration</p>	
<p>Competency</p>	<p>Distinguished</p>	<p>Competent</p>	<p>Developing</p>	<p>Unacceptable</p>	<p>Unable to Assess</p>
<p>CPD5: Creates, implements, and assesses a comprehensive, cohesive system of family services that support family resilience and well-</p>	<p>Creates comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments using</p>	<p>Creates comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments using</p>	<p>Creates comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p>	<p>Creates incomplete systems of family services that are partially responsive to family resilience and well-being</p> <p>Implements incomplete systems of family services</p>	

being within the context of typical, everyday environments	<p>evidence-based and values-based standards</p> <p>Implement comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p> <p>Uses evidence-based and values-based standards to evaluate comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p> <p>Research is used to support design, implementation, and analyses</p>	<p>evidence-based and values-based standards</p> <p>Implement comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p> <p>Uses evidence-based and values-based standards to evaluate comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p>	<p>Implement comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p> <p>Evaluates comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments</p>	<p>that partially support family resilience</p> <p>Evaluation of comprehensive, cohesive systems of family services is incomplete or inaccurate</p>	
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
FCR6: Designs program policies and practices that promote family engagement and collaboration through the provision of meaningful engagement opportunities, involvement in decision-making processes, and	<p>Designs meaningful program practices that support family engagement and collaboration, including involvement in decision-making processes</p> <p>Demonstrates respect for each family's preferred language and modes of communication</p> <p>Provides research-based rationale for the</p>	<p>Designs meaningful program practices that support family engagement and collaboration, including involvement in decision-making processes</p> <p>Demonstrates respect for each family's preferred language and modes of communication</p>	Designs program practices supportive of family engagement	Designs program practices that undermine family engagement	

demonstrating respect for family's preferred language and modes of communication	importance of culturally and linguistically responsive program practices				
Competency	Distinguished	Competent	Developing	Unsatisfactory	Unable to Assess
FCR7: Develops, implements, and assesses--in partnership with families and other providers—evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthens the family functioning through their ability to access and manage resources, including the family's role in parenting children	<p>Develops evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p> <p>Implements evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p> <p>Assesses evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p> <p>Uses research to support rationale for program development, implementation, and assessment</p>	<p>Develops evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p> <p>Implements evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p> <p>Assesses evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthen family functioning</p>	Develops, implements, and assesses evidence-based, integrated, comprehensive, and legal family programs and plans	Develops, implements, and assesses family programs and plans	

Yellow = Level 2 Green = Level 3 Orange = Level 4 Blue = Level 5

IV. Data Collection & Analysis Tool

Competencies	Cumulative Assessment Data				
	Distinguished	Proficient	Needs Improvement	Unsatisfactory	Unable to Assess
FSC PPD1: Demonstrates professionalism in appearance, behavior, and					

disposition					
FSC IRE2: Establishes reciprocal relationships with families, demonstrating respect for family competence and resilience					
FSC CPD4: Develops, implements, and assesses—in collaboration with families—content, evidence-based programs, interventions, and family service plans developed to emphasize family strengths and support family priorities, concerns, and need					
FSC PPD6: Designs and participates in collaborative systems and proactive, visionary leadership that address structural inequities in society and human service systems and support family cohesion and well-being					
FSC PPD7: Designs and participates in collaborative systems and proactive, visionary leadership addresses structural inequities in society and human service systems and mitigates against family cohesion and well-being					
FSC CPD5: Creates, implements, and assesses a comprehensive, cohesive systems of family services that support family resilience and well-being within the context of typical, everyday environments					
FSC FCR6: Designs program policies and practices that promote family engagement and collaboration through the provision of meaningful engagement opportunities, involvement in decision-making processes, and demonstrating respect for family’s preferred language and modes of communication					
FSC FCR7: Develops, implements, and assesses--in partnership with families and other providers—evidence-based, integrated, comprehensive, legal and ethical programs and plans that strengthens the family functioning through their ability to access and manage resources, including the family's role in parenting children					

Family Needs Assessment Interview Questions

Date:

Name of Interviewee:

Interviewee's Identification of Role in the Family:

Name(s) of Family Members Living in Household:

Age(s) of Children:

Family Race(s):

Family Ethnicity/ies:

Preferred Language of Interviewee:

Presenting Problem/History

- Chief complaint/main issue(s) family experiencing (prominent issues, precipitating events, barriers family is facing in addressing the issue)

Family Resources

- **Housing** (If family is homeless, living in unsafe, unstable housing, or at risk of eviction, help the family access shelter, transitional housing, and low income and/or offer referral to a housing program or a legal service program as appropriate to needs).
 - What, if any, are the housing needs?
 - Describe the living and sleeping arrangements.
 - Describe neighborhood (location, crime, condition, etc.).
- **Income** (If there's a need for financial assistance, help family to apply for needed benefits, provide referral to appropriate programs and assist with application)
 - What is the main source(s) of income for the family?
 - Is the family receiving financial resources (i.e. SSI, food assistance, unemployment, etc.)?

- Is the family currently having financial difficulties? If so, describe.
- **Social and Community Functioning**
 - Does the family participate in social/spiritual functions (Church, temple)? If so, describe?
 - If not, is the family interested in participating in social/spiritual functions? If so, explain.
- **Transportation**
 - Does the family have transportation issues? If so, describe.
 - Nutrition
 - Does the family receive any type of food assistance? If so, which ones and how often?
 - Does anyone in the family have any dietary limitations or food allergies?
 - What nutrition concerns does the family have?

Child Education and Peer Relationships

- **Education**
 - Do any of the children in the home have a challenge at school? What is the challenge? Is it being addressed?
- **Peer Relationships**
 - Have any of the children in the home had issues with bullying? If so, what are the issues? How are the issues being addressed?
- **Strengths**
 - What are the children's educational strengths?
 - What are the children's hobbies and interests?

Mental Health History

- **Do any of the family members have current or history of the following? If so, who?**
 - Loss of interest in activities
 - Sleep disturbance
 - Hopelessness
 - Irritability
 - Depression
 - Bad dreams/nightmares
 - Obsessive behaviors
 - Phobias
 - Panic attacks
 - Anxiety
 - Delusions/ Hallucinations

- Mood Swings
- Impulsivity
- Inattention
- Hyperactivity
- **If yes to any, provide details:**
- **Has anyone in the family received mental health treatment? If yes, provide details.**
- **Does anyone in the family have a history of substance use or misuse? If yes, describe.**
 - Is anyone in the family receiving substance misuse treatment? If yes, provide details.

Medical History

- **Do any of the family members have current or history of the following medical conditions? If so, who?**
 - Allergies
 - Anemia
 - Anorexia/Bulimia
 - Asthma/Emphysema
 - Cancer
 - Diabetes
 - Ear Infections
 - Encopresis
 - Enuresis
 - Epilepsy/ Seizures
 - Glaucoma/ Eye Disease
 - Headaches
 - Head Injuries
 - Heart Disease
 - High/Low Blood Pressure
 - Liver Disease
 - Menstrual Problems
 - Intellectual Disability or Developmental Delay, specify:
 - Neurological Problems
 - Physical Disability
 - Serious Injury/Surgery
 - Sexually Transmitted Infection

- Suppressed Immune System
- Skin Problems
- Thyroid Problems

Assessment of the Need for Services/Resources

- **Strengths/Goals**
 - In interviewee's words, describe long term goal(s):

- **Identify current services and their effectiveness:**
 - Family Therapy
 - Group Therapy
 - Hearing Specialist
 - Individual Therapy
 - Occupational Therapy
 - Psychosocial Rehabilitation
 - Pastoral Counselor
 - Physical Therapy
 - Psychiatric Services
 - Psychological Services
 - Speech Specialist
 - Substance Abuse Counseling
 - Tutoring Services
 - Parenting Skills
 - Other:

- **What are the family's strength(s)?**
 - Strong family support
 - Supportive friends
 - Strong spirituality
 - Good insight
 - Resourcefulness
 - Communication skills
 - Hard working
 - Resilient
 - Community involvement
 - Motivated to change

- Transportation
- Educated
- Able to ask for assistance
- Financially stable
- Talents
- Skills
- Interest
- Dreams
- Hopes
- Goals
- Ownership
- Passion/ Drive
- Creativity
- Other assessed strengths: