

## Beyond Assessments—The Importance of Case Planning Case Planning Puzzle Assembly Activity

### Foundational Case Planning Background Information

- Client-Centered Case Planning: A collaborative process in which the worker facilitates plan development with the youth and family, with all elements of the plan specific to the youth's strengths, circumstances, problems, and needs. When all parties agree on the plan, the plan is much more likely to be carried out.
- Case Analysis: Often-used methods of analysis include all assessment results, parent interview, review of court records, review of police records, review of school records, etc.
- Problem Identification: This is the procedure for citing the problems that contributed to the youth's negative behavior and the result of that behavior. The process should also identify strength areas to be leveraged in the planning process.
- Problem Prioritization: This is the procedure for determining the most critical problems that contributed to the youth's negative behavior and problem interdependence.
- Components of a Written Case Plan:
  - » *Problem statement*: Statement of youth's negative behavior, the conditions leading to that behavior, and the negative results of that behavior.
  - » *Long-range goal*: Statement of the youth's desired behavior once the problem is resolved; a long-term outcome.
  - » *Short-range objectives*: Steps toward obtaining the long-range goal that are measurable, behavioral, and time-framed.
  - » *Action plan*: Step-by-step detail for achieving each short-range objective.

### **Puzzle Assembly Scenario**

Your agency performance contracts state that all project team members will be terminated from employment if allocated budgets are exceeded. You have seen this happen on several occasions. Project teams in your agency comprise either two or four assembly units. The latest budget report indicated your project team is \$5,000 over budget. If your project team successfully completes this puzzle assembly project, you will make \$10,000 (earning two rubber ducks per person), and the team will come in \$5,000 under budget (earning one rubber duck per person), and you will be heroes. Lately, the project team assembly units have been experiencing planning and communication difficulties.

You have 10 minutes to develop a plan and 25 minutes to exchange pieces and assemble the puzzles. During the planning phase it is important to determine which puzzle your unit will assemble. Rule violations cost \$1,000 for each infraction (loss of one rubber duck per infraction), and a \$1,000 fine will be imposed (loss of one rubber duck per minute) for each minute the project goes over the allotted 25-minute assembly time. Teams with no infractions will be awarded a bonus of \$1,000 per team member (one bonus rubber duck per team member).

### **Rules**

- Units may exchange a maximum of three pieces at one time.
- Pieces may be exchanged only when all unit representatives (one representative per unit) are at the exchange table.
- Units can talk to each other at the exchange table only.
- Units may have one representative only at the exchange table at any given time.
- Unit members must take turns representing their unit at the exchange area until all puzzles are assembled.
- Unit representatives may not take a puzzle piece without exchanging the same number of pieces.

## PUZZLE ASSEMBLY PROJECT CASE PLAN

Problem Statement:

Long-Range Goal:

Short-Range Objective:

Action Steps

Responsible Person

Successful

Unsuccessful

Short-Range Objective:

Action Steps

Responsible Person

Successful

Unsuccessful

## **After-Action Review**

What worked? What went well? What did you appreciate about others' contributions?

What aspects of the planning session were valuable?

- What about your plan changed or evolved?
- How well did the plan work?
- In hindsight, what would have made the plan more effective?

How were decisions made?

How well did you use unit and project team resources?

How well did your communication strategy work?

- Did it evolve or change? How?

What were the risks?

- When a "mistake" happened, who owned it?

What changed when you were representing your unit at the exchange area?

- In what ways were your efforts effective?
- In what ways were your efforts ineffective?

How was conflict resolved in your assembly unit area? Was it effective?

Did you celebrate? Big wins or small ones too?

- What did celebrating do for your group?

What are the key learnings from this exercise and how do they translate to your real-world case planning work?

What would you do differently (personally, as an assembly unit, as a project team)?