**CSR Plan & Report Guidelines**

**CSR Plan**

*(The CSR Plan is due 30 days from the date of the referral.)*

***Demographic and Referral Information***

***Child/Youth Information:***

* + - * Add child’s name, birth date and age.
* Check yes or no to contact with any birth family member, except siblings which are covered in the next block.
  + Use the first comment box to describe the current contact. Include:
    - With whom.
    - What kind of contact.
    - If in person, whether it is supervised or unsupervised.
    - How often, where, and the nature of the contact (Is it positive, does the child enjoy it?)
  + Use the second comment box to discuss whether there could be contact after placement.
    - Is the person a potential permanency resource?
    - Does the child want to maintain contact?
    - Will the contact be the same as it is now or might it change?
    - Is the person interested in having a PACA?
* Check yes or no to each question and use the comment box to indicate:
  + The number and ages of siblings and if any of them are being placed together. You can also comment about where siblings are placed, e.g. already adopted, in foster home etc.
  + What the contact currently looks like. Include:
    - With which siblings.
    - What kind of contact.
    - If in person, whether it is supervised or unsupervised.
    - How often, where, and the nature of the contact (Is it positive, does the child enjoy it?)
  + Is it expected there will be contact after placement? Include:
    - Type of future contact.
    - If any siblings are being placed or are already placed separately, might there be a PACA?
  + If siblings are also receiving CSR, comment on whether there is collaboration with the CSR worker or if the CSR worker is the same for the sibling.

***Current Placement Information:***

* Enter name of family or facility where child is currently placed.
* Check the type of placement whether kinship, foster, congregate care or other.
* Answer the questions about permanency goals in the box:
  + Enter child’s permanency goal.
  + Enter child’s concurrent goal.
  + Answer yes/no to legally free and add any comments needed to clarify.
  + Answer yes or no to re-referral and add any comments about previous CSR referrals.

***Contact Information:***

* Enter child’s SWAN ID#, PAE ID# and, for Philadelphia referrals, DHS number.
* Enter contact information for county agency, SWAN affiliate, CUA for Philadelphia referrals and any other private agency. Use ‘other’ category for additional contact information.

***Collaboration***

***County input into the plan:***

* Include detailed information from conversations with the county. This will be the documentation that determines whether the affiliate has completed CSR according to the county’s expectations.
  + What does the county want the affiliate to do?
  + What does the county restrict the affiliate from doing?
  + What does the affiliate need from the county to complete the CSR?
  + What has the county agreed to provide to the affiliate in the completion of CSR?
  + What is the procedure when a permanency resource is identified?
  + What does the county need in order to agree that the unit is completed?

***County’s plan for involvement and communication:***

* How often and by what means will the affiliate communicate with the county?
* What ongoing information does the county want from the affiliate? *(e.g. request permission before contacting kin; or update about child’s wishes concerning permanency.)*
* The benchmarks require monthly review of the case with the county. What is the plan for that to happen *(where, when, how)*?

***Previous and Current Services Referred:***

* In this chart, use the comment boxes to discuss any current or previous services the child/youth has received. Note such things as date it was referred, outcome if any, need for a re-referral, etc.

***Team members***

***Team member chart:***

* Use the dropdown box to select team members.
* Enter contact information.
* Discuss plans for ongoing contact. How will that team member contribute to CSR?

***Input from the team:***

* Include any previously unknown information or insight from team members that will impact the CSR plan.
* Describe who wants what done and who will do what part of the plan.
* Add team’s expected outcomes for CSR.

***Engagement of Child/Youth***

***Date CSR worker meets child/youth and begins engagement:***

Indicate the date CSR worker met the child and began engagement around permanency.

Include discussion of whether or not the child/youth was engaged.

Describe what the youth did or said that demonstrated engagement or lack thereof.

***What is child/youth’s understanding of permanency?***

For this discussion, consider:

Has the child received Child Preparation services? What was the outcome?

What is the child’s understanding of their life story and the reasons for placement?

What has been done to address the child’s feelings of grief and loss, abandonment, loyalty, etc.?

What is the child’s perspective regarding belonging to more than one family? Who do they identify with and are there loyalty or attachment issues?

***Describe child/youth’s expected outcomes:***

Discuss child’s/youth’s thoughts about the outcome of CSR.

Does the youth want a family?

Is the youth open to exploring kin?

Is the youth open to looking for families beyond kin?

Is the youth open to seeking significant, permanent connections?

***Discuss child/youth’s ideas for finding a family:***

Include discussion of such things as the people the child/youth knows, important relationships, places for recruitment, use of media, geographical locations, type of family, etc.

***List potential significant connections with supportive adults:***

* Include adults the child identified that should be explored as potential significant connections.

***Factors That May Impact Service***

***Factors chart:***

* Use this chart to identify and discuss anything that may **enhance** or **inhibit** service. Some examples:
  + Foster parent either receptive or uncooperative.
  + Residential facility presents scheduling difficulties.
  + Child is non-verbal.
  + Child is outspoken and has ideas of what he wants.
  + Youth’s desired outcome is different from county’s.
  + Birth family wants to be involved.
  + County restricts exploration of birth family (this may be a positive or negative factor so describe that in your discussion.)
  + Youth has hope for family/connections
  + Youth is not willing to participate in most recruitment activities.
  + Youth will not consider moving outside his current school district.

***Revisions***

The CSR Plan is a living document that may look different at the end than it did at the beginning. Often the direction of the service changes as it progresses. Focus may narrow or expand, for example, geographical regions are ruled in or out, family is excluded or included, child moves to a more restrictive setting or is resistant making current recruitment plans unrealistic. There are any number of situations that can change the focus and approach of recruitment efforts.

Changes in the CSR Plan could be reflected in the **county input into the plan, county’s plan for involvement and communication, factors that may impact service** or any of the headings under **engagement of child/youth.**

When revising the plan, save the original in the file and make changes to a copy, adding the revision date below.

Planned strategies will be affected by a change in the plan. How those strategies are affected can be documented in the Strategies Chart in the Monthly/Final Report.

* Enter the date of the plan when it is first completed.
* If the plan is being revised, enter the date of revision.
* Enter the date that the change in plan was discussed with the county. Any information about that discussion can be included here.

***Recruitment Strategies***

***Recruitment Strategies Chart:***

* The Recruitment Strategies Chart is started in the CSR Plan and kept current in the Monthly/Final CSR Report.
* It is provided here as an example of possible activities that can be used to create an individualized plan for each child. Plans may include some or all of the activities, as well as, additional strategies that are not on this chart.
* Use the chart in the CSR Plan to:
  + Collaborate with the county to plan and agree on strategies.
  + Define affiliate and county roles within strategies.
  + Document if there are strategies the county doesn’t want done at this time.

***Signatures***

* Signature and date lines are provided for CSR worker and supervisor and county worker.
* Agencies are encouraged to have the child, when appropriate, review the Strategies Chart from the plan and add their signature.

**CSR Monthly/Final Report**

*Affiliate agencies have the option of choosing to have all CSR Monthly/Final Reports due on the same date. For example, if an agency chooses the 5th of the month for CSR Monthly/Final Reports, the first report may be for a shorter or longer time period to meet the due date of the 5th, but after that all reports will be for a full month.*

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***Child Meeting Summary***

***Child Meeting Summary Chart:*** *(This is monthly, not cumulative)*

* Enter the date and location of the meeting with the child.
* In the text box, describe the session with the youth, including what was discussed, such as, review of potential families, recruitment ideas, youth’s questions and responses.
* Discuss any activities done with the child and the child’s level of participation.
* Include worker’s observation of youth’s behaviors, emotions and attitude.

***CSR Contacts***

***CSR Contacts Chart:*** *(This is monthly, not cumulative)*

* Enter the name of the contact and any dates associated with the contact.
* Use the notes sections to:
  + Track ongoing interaction concerning a potential family:
    - All contacts concerning a family, whether the contact is with a worker, PAE, the family itself or anyone else, should be entered in the notes under the family name.
    - Include such things as:
      * Contact information if desired.
      * Family profile was sent to county and awaiting response.
      * Family is no longer interested.
      * Responsiveness of county agency or other significant contacts in the process.
      * Anything else regarding the follow up of the potential ***family.***
* List contacts separately when the contact is related to general recruitment efforts for a child.
* Include such things as:
* Contact information if desired.
* Content or outcome of the contact.

***Significant Connections With Supportive Adults Chart:*** *(This is cumulative)*

* Enter identified connections and use the notes section to describe their commitment level and how they will be involved in the youth’s life.

***Factors That May Impact Service***

***Factors chart:***

* The ‘Factors That May Impact Service’ chart is started in the CSR Plan to identify and discuss anything that may **enhance** or **inhibit** service. Its inclusion in the Monthly/Final Report is to:
* Identify the impact of those factors as they play out in the delivery of service.
* Document the progress of work to address the factors.
* Identify roles of county and affiliate in addressing factors that inhibit service.

***Recruitment Strategies***

***Recruitment Strategies Chart:*** *(This is cumulative)*

* The ‘Recruitment Strategies’ chart is started in the CSR Plan. Its inclusion in the Monthly/Final CSR Report is to:
  + Provide an example of possible activities that can be used to create an individualized plan for each child. Plans may include some or all of the activities, as well as, additional strategies that are not on this chart.
  + Track the progress, effectiveness and outcomes of used strategies, including such things as number of matching events attended, results of child generated PAE search, etc.
  + Incorporate additional strategies.
  + Define affiliate and county roles within strategies.
  + Note strategies that will be implemented later in the process.
  + Document reasons for discontinuing strategies.
  + Document non-use of strategies if prudent.
  + Document county input, response, requests or comments about strategies.
* Include dates in the comments when appropriate to indicate start or completion of strategies.
* Consider the activities in the [CSR Recipes for Permanency](http://www.diakon-swan.org/swan/documents/?category=&headline=Recipes+for+Permanency&description=) when choosing strategies.
* The ‘Recruitment Strategies’ chart in the Monthly/Final Report is cumulative; Information is added to it each month.

***Tasks/actions to be taken next month***

* In this section, workers should list specific things to be done the following month. Such things could include:
  + Getting a response from county to move forward on a potential match.
  + Steps to follow up on a potential match.
  + Plans to move out in a new direction.
  + Steps related to addressing factors from the ‘Factors That May Impact Service’ chart.
  + Scheduled matching events.

***Signatures***

* Signature and date lines are provided for CSR worker and supervisor and county worker.
* Agencies are encouraged to have the child, when appropriate, review any updates to the Strategies Chart in the report and add their signature.