

Child Protective Services Supervisor Toolkit: Tips to Successfully Manage a CPS Team



Introduction & Acknowledgements

Welcome to the ***Child Protective Services Supervisor Toolkit: Tips to Successfully Manage a CPS Team***. This is meant to be a practical guide to provide additional recommendations and resources that have been used successfully by current CPS supervisors from across Oregon. This is not intended to replace the other resources available to help successfully manage the workload of CPS teams. This toolkit will continue to evolve and change as new effective strategies are discovered and shared. This toolkit cannot capture all the areas one must manage in the important and complex role of a CPS supervisor. It is meant to be kept simple and easy to navigate. The guiding principles of the Oregon Child Welfare Division Vision for Transformation has been paramount in the development of this guide.

This toolkit is in the beginning stages of development. There was a request to develop helpful tips to support the ongoing efforts being made across the state to meet the expectations to complete safety assessments timely while also making sound safety decisions. A small group of people with experience successfully supervising CPS teams were asked to participate in the development of the first sections of this first edition of the ***Child Protective Services Supervisor Toolkit: Tips to Successfully Manage a CPS Team***. The group began meeting one time a week starting January 5, 2022. The group has consisted of representation or support from Klamath County, Tillamook County, Linn County, Josephine County, Umatilla County- Pendleton Office, Baker County, Union County, Wallowa County, Benton County, Washington County, Tribal Affairs, Human Resources and Central Office Safety Program. This group of experienced CPS supervisors, Program Managers and District Managers will continue to move the work forward to further develop this toolkit. This group will continue to grow and change its participants and be able to offer additional supports to CPS supervisors who are developing, struggling, or looking for additional guidance from peers. Together our experiences of failure and success may help others avoid some unnecessary struggles which will improve outcomes for families, caseworker and supervisor retention, higher job satisfaction and develop a work environment that values accountability, continuous improvement, and high-performance standards.

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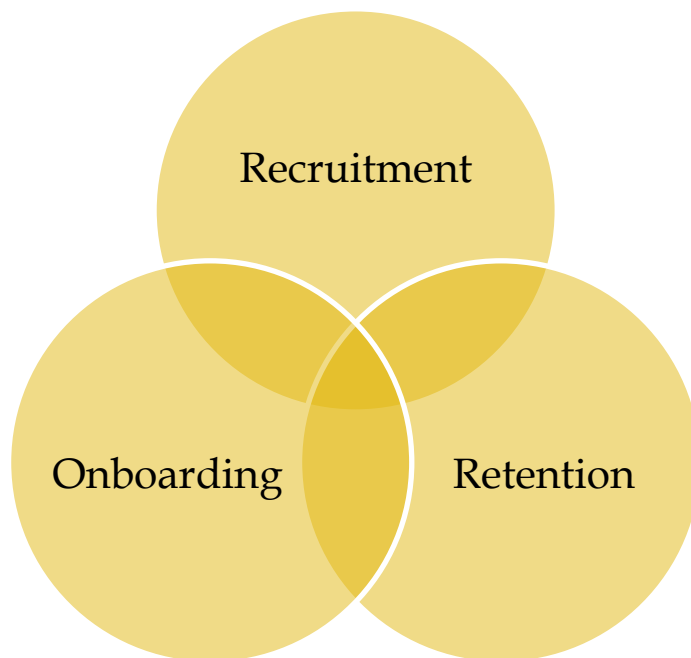
Important note:

As this is a living document, view the most current version of this content by accessing it directly through the Toolkit saved in SharePoint on the [CPS Resources page](#). Avoid saving content to a desktop or shared drive.



Section 1

Recruitment, Onboarding & Retention



Initial investment in recruitment and onboarding are critical to retention. Applicants must be provided information and a realistic description of the CPS SSS1 position. Recruitment must be a priority for Delivery offices. The recruitment and hiring process can be time consuming. In some Delivery offices there are hiring teams and in some Delivery offices individual supervisors are responsible for recruiting for individual positions assigned to them for supervision.

Pro Tip: We, the participants brought together to draft this toolkit, recommend whenever possible Delivery offices or Districts should develop a hiring team with one responsible hiring manager to fill all vacancies. This allows supervisors to spend time with workers coaching to practice, professional development and providing critical worker support and retention.

When referring to recruitment it is good to know the Office of Equity and Multicultural Services (OEMS) is working on recruitment strategies to attract a diverse and inclusive group of people to work for ODHS. There are many things OEMS does for recruitment efforts that overlap what Delivery offices can and might be doing for recruitment. You can partner with your assigned [Recruiter Business Partner](#) to develop strategies you, or your hiring team, can do locally to recruit for your office's specific needs.

The recruitment announcement: When recruitment emails are often sent out it is helpful to provide details about the team and the benefits of working in the Delivery office or community. This is one example of a child welfare all staff recruitment email:

[Recruitment Email](#)

This video is available, and applicants could be required to review this prior to an interview. [Career Page Social Service Specialist 1 Recruitment Video](#)

Providing an up-to-date position description prior to the interview is important as well.

The interview process: Consider diversifying the interview panel by including other CW program areas, Supervisors, Tribal Partners and MAPS or others from different offices, community partners, Parent Mentors, union stewards, an equity partner like a member of your local equity and inclusion committee, etc.).

[Preparing the Panel](#)

[Interview Panelist Agreement](#)

Ask Human Resources, Recruitment or OEMS for support around questions to aid in learning about essential attributes you are seeking in applicants. Refer to [Interview Questions Do's and Don'ts](#).

Review how questions are framed and worded. Consider how applicants may interpret questions differently based on having diverse backgrounds and perspectives. Infuse diversity, equity, and inclusion questions into the interview.

[Interview Questions for Diversity](#)

[CPS Interview Questions with Essential Attributes](#)

[Interview Questions SSS1 – 2022](#)

Look for people whose skills and attributes can fill gaps in your existing teams' strengths instead of relying on similar experience, background, skills and perspective.

[Attribute Matrix](#)

[Interview Evaluation Scoring Matrix](#)

[Hypothetical Case Scenario Writing Sample](#)

Another way to identify skills and attributes specific to CPS is to have the applicant complete a writing activity based on a hypothetical case scenario.

[Hypothetical Case Scenario Writing Sample](#)

Reference checking:

Reference checking is to confirm what you learned about an applicant during the interview process. You should complete a reference with the current supervisor and past supervisors. The references should be professional references. Below are a couple of reference forms to help guide conversations. You will need to take and keep notes for references. Your local delivery office hiring supports likely have a process for how to retain references as they must be retained in the event an applicant contests the hiring decision.

[Reference Checks](#)

[Reference Check Form](#)

Onboarding: Welcoming newly hired or transferring workers to the team is exciting. It takes multiple people to make a new worker feel welcomed and supported and starts with the supervisor's introduction of the new member of the team. Both short, immediate tasks, and long-term strategies are needed to support onboarding and training, including.

- Reaching out to new workers prior to their first day to:
 - make an introduction
 - answer questions the worker may have
 - ask the new team member what they would like included in a welcome message to the office, including receiving a photo if they agree a picture if agreeable.
- This can be the assigned supervisor, MAPS, office manager, lead worker, etc.
- Send a welcome email the CPS team introducing the new team member.
- Have a workspace designated that is clean and free of extra supplies and dumped equipment. Some teams chose to decorate or make a welcome message.
- Many Delivery offices are having MAPS identified and assigned to mentor new workers for the first few days and even the first year of onboarding. If MAPS are not available experienced workers with a desire to mentor and

support have been identified as well.

- Prepare a welcome packet of important information. Example: [Onboarding Guide for Beaverton](#).
- Prepare a monthly calendar with routine meeting dates, times, and locations, including supervision time.
- Identify and provide shadowing opportunities like court appearances, CAC appointments, MDT, Infant Staffings, etc. Ensure each experience is explained so that the new team member understands what it is they are observing. Have the CPS worker track their shadowing: [Shadow Tracker](#).
- Introduction to the Wellness Committee, Diversity, Equity and Inclusion Committee and Employee Resource Groups, as well as office managers and business support.

Best practice: spread learning out, transfer of learning activities, classroom, and practical experiences. Follow up with new team members about their experiences and provide opportunities to answer questions they may have.

The training plan from Child Welfare Equity, Training and Workforce Development to help with the first 6-12 months of learning for new workers.

[Social Service Specialist 1 On-Ramping](#)

Benton County has a [Recruitment & Retention Plan](#) that helps the office with low turnover in staff, increased morale, and sound child welfare practice. This plan operationalizes all the things above in this section. It is specific to their office but provides useful information in a simple way.

Even with the best recruitment, onboarding and support people will make decisions to leave. Not all turnover is bad. Conflict of values in individuals vs. the agency's values may sometimes be difficult to overcome or not at all. Helping workers make sure CPS casework is right for them and right for the agency, community and families served is a large part of supervision in the trial service period, but beyond that time frame as well. Trial service is a critical time to provide timely, direct performance feedback. This is a time to help new workers understand that position duties and ultimately if the work they can do or want to do. It is not a personal failure as a supervisor or as a new worker to have workers leave the work before or at the end of trial service. We want workers to be successful and happy in this work. There may be other positions in the agency that will make a better fit and be fulfilling. Partnering with your Human Business Analyst is critical when there are performance concerns.

Section 2

Supervision

There are no policies or procedures dictating how often and in what way supervisors must perform supervision duties. There is policy about the critical junctures in a CPS assessment a supervisor must provide approval, but that is separate from coaching and reflective supervision time to help workers enhance their skills and professional development (critical to worker retention). People work for supervisors and can endure the bureaucracy when they feel supported and cared for personally as well as in the work of the agency.

Pro Tip: Meeting for regular supervision with your staff will help them feel calmer and more grounded in the management of their workload and will reduce their need for emergency staffing.

Best Practice: Meet one hour a week with each worker as a minimum. Setting expectations for weekly supervision and staffing:

- This should be routinely scheduled. A reoccurring calendar invite for the same day and time each week.
- Expectations about supervision should be communicated. This includes establishing the boundary that interruptions are not allowed during supervision.
- If an interruption is necessary, ask the permission of the worker whose supervision time is being impacted.
- If scheduled supervision time is impacted by an urgent staffing need, reschedule the supervision time as soon as possible and in coordination with the worker's schedule.
- Assure workers that they do not need to wait for scheduled supervision if they have an urgent need for staffing.
- Providing boundaries on how to arrange urgent staffing within the unit and the office may help in providing support to workers, while meeting scheduling obligations. This includes requesting a worker message prior to coming to your desk/office or calling, arranging for another supervisor, MAPS, consultant, or PM to be available when unavailable and communicating coverage to your workers.

Note taking

Note keeping during supervision is important especially if it is related to case specifics, performance feedback for training and professional development.

Developing to do lists for worker and supervisor during the discussion and sharing the notes to help with follow up and accountability for both the worker and supervisor.

Examples of note taking:

- Taking electronic notes in email or a running supervision narrative and sharing the narration with the worker.
- Handwritten notes kept in a binder and sharing the narration with the worker.
- Have the worker take notes and share with you.

Klamath County uses a [CPS Assessment Activity Checklist and Case Note Log](#). This is attached to every case and workers narrate and update supervision guidance as the assessment progresses. It is referenced during every discussion about the assessment.

There are additional to-do lists available on [CPS Resources](#). In CPS Assessment Tools there are links to [CPS To-Do lists](#) which include CPS assessments, third party CPS assessments, and CPS assessments with legal involvement. There is also a link to an [Out of Home Care CPS Checklist](#).

Huddles:

The use of huddles in person and/or virtually has become critical to team functioning. In some offices this occurs daily to help with assignment of work and team cohesion. Other offices huddles occur 1-2 times a week and as adhoc. Huddles are meant to be quick around 15 minutes and address the current needs of the team. Examples of huddle topics: share something that is going well, discuss coverage needs, reminders about upcoming deadlines, etc. You will read below some Delivery offices hold daily huddles with may take longer than 15 minutes as this time is also used to make new referrals assignment decisions.

Unit Meetings:

The use of Unit Meetings is also important for team cohesion and downloading important business and practice information. These meetings are generally 1-2 hours weekly or bi-weekly. Often this time is used for discussion about practice, policy transmittals, team updates, and team building activities, guests may be invited to share new resources or processes. Worker participation in agenda planning and participation are important. Often these meetings are mandatory for the entire team.

Safety culture:

We are learning more about Safety Science-Safety Culture and its importance for retention and worker well-being. Individual and group supervision along with huddles

and unit meetings help with ensuring we are developing the culture that allows for open communications, systems and individual worker and supervisor accountability, continuance of learning. Supervisors should not do this alone. This is most effective when teams help monitor and respond in partnership with leadership.

Section 3

Designing An Equitable Assignment Rotation

Assigning new referrals will always be difficult to do equitably. Size of CPS team (one unit [7 workers]), 3 units [21 workers] 8 units [56 workers] can make this more challenging along with other factors like vacancy rates, unplanned absences, etc.

Things to consider: Use transparency in assigning new referrals and additional work duties like re-assigned referrals. Transparency in the numbers and decision making around workload is important. It helps create an environment of trust between workers and supervisors as well as among workers.

In some offices specialized units have been developed. Some examples of specialized units include Commercial Sexual Exploitation Children (CSEC), newborns at the hospital, Substance Use Disorder (SUD), Intellectual and Developmental Disability (I/DD), Third Party, Adolescent, Out of home Care Assessment (OHCA), Karly's Law, ICWA/ORICWA.

Rural areas with large distances to travel assignment decisions are often made based on where the family is located, and which worker already has contacts to make on another assessment near the location.

In small offices assignments are made as a team each day by huddling and discussing pending assignments and what each team member has going on for the day and capacity to respond. Ultimately the supervisor makes the ultimate assignment of work decisions, but this is done in collaboration with the unit. This has been successful in Klamath and Tillamook County as two examples.

The use of business support to help monitor the referrals being assigned to the Delivery office from ORCAH each day and throughout the day has proven to allow CPS supervisors more time to focus elsewhere like direct coaching supervision, reviewing and approving assessments, going out on CPS assessments with workers for support and training. The rotation of workers is decided ahead of time and updated each day depending on the changing availability of workers (out sick unexpected or court trial all day) and communicated to the business support.

For worker planning and a more predictable schedule some offices elect to use a weekly or monthly calendar projecting who is on assignment for new referrals. This is a simple calendar often business support assist in putting together with something like a "When is Good" calendar invite for workers to share dates it would be most difficult to receive new assignments due to trials, vacations, all day trainings, etc.

In some offices this is not possible due to size and/or availability of workers so a Wheel is used. Certain criteria developed for when a worker should be skipped over in the assignment Wheel and when to go back to that worker for another assignment. What is the Wheel? A list of all CPS workers who maybe be assigned assessments. New referrals are assigned in order of the workers names on the list. When all of the workers have been assigned work (or skipped as planned and decided) you move back to the top of the list.

How new assignments are captured and tracked is an office by office process, but all offices track assessment assignments and select data points like compromised timeline from ORCAH, language/cultural needs, Infants under 12 months old, etc.

Here are some assessment tracking logs as examples:

[eAssignment
Log D8](#)

[eAssignment
Log D12](#)

[eAssignment
Log D16](#)

[Handwritten
Assignment
Log D11](#)

From District 12 Traci Corwin shares thoughts about their assignment strategies: “Assignments come into the District mailbox for all three offices (Hermiston, Boardman and Pendleton). Each supervisor assigns for their unit and will cover for the others if they are out. We each look at who has what planned for the upcoming week, vacations etc., caseload, location, and look at case content. (example: if a staff has come to a supervisor with an issue their own personal relationship which is similar we would not assign them cases that have that for a few days etc.) All CPS workers have protected time from 8-10 each morning, they will be off rotation if they have a pick-up order, 10-day protective action plan put in place, new in-home plan to ensure required things get done. If a caseworker has an extended vacation, medical leave, or training we also will look to protect them prior to tie up loose ends on cases.”

From District 8 Desiree Blay- “Rotation is a little different... we go from week to week, just looking at how many a worker got the prior week, caseload/overdues, if they have court cases, availability/upcoming time off/returning from time off, and of course experience. We also have a rotation for our overflow workers (non-CPS workers that are SSS1s and getting 307s due to short staffing).” “We don’t have a formal rotation as far as week on/off or anything, but we are reinstating a protect rotation/sign up for workers to get time each week that is protected, either in ½ or full days, with us reserving Monday mornings and Friday afternoons as non-protected time due to the nature of those days/times typically being exceptionally busy...We are also doing Power Hour M, T, Th, Fr that is quiet/focus time from 8:30-9:30 to enter the prior day’s documentation, and Extended Power Hour every Wednesday from 8:30-10:30. We have also implemented optional extended workdays on Tuesday and Thursday, 6am-

7pm for workers that have a need for OTM for overdues. We did this to reduce requests for OTM for overdues on weekends, as workers really need that time to recharge!”

From District 11 Lindsay Clemens-

Assignments in D11 - Klamath are made by the PS supervisor(s). There are three PS supervisors and a rotation of the board/assignments daily. Each morning there is a huddle to discuss assessments to the PS workers from overnight. A hand written assignment board is used to track assignments, time off, court, etc. for the PS workers. Assignments are made during the huddle and the rotation for upcoming assignments is discussed for assessments that come in during that day.

The assignments board is made new each week putting the PS worker with the least amount of assessment for the month at the top and ending with the worker with the most assessments. Assignments for Resource Home assessments and Out of Town assessments (over 45ish miles) are tracked separately to ensure that these are assigned equally. The day after a child removal, that PS worker is not assigned new assessment so that they are able to prepare for court that day.

Each PS worker receives three-day protected periods of time as well as a rotation of Wednesday’s “on-call” each month. On Wednesday, a rotation of three PS workers take all assignments and all other PS workers are protected. Based upon the number of PS workers at a time, PS workers typically have approximately 6-8 protected days each month and one Wednesday “on-call.” Protected time is to be utilized for typing assessments only. Appointments, interviews, etc. are not to be schedule during protected days unless an emergency; CARES, court, etc. The protected/on-call schedule is prepared for a period of 3 months so each PS worker is able to manage their schedule and appointments well in advance.

Pro Tip: Assigning is one the most difficult things to do as a supervisor. So many factors influence decisions and capacity from day to day. Equity does not always occur, so teams must be flexible and change the method and consideration from time to time.

Section 4

Use of Technology

From day one of onboarding the use of SpeakWrite or another dictation options should be a clear expectation. There is no reason this skillset cannot be learned and used to be efficient in time management and completion of work.

On the iPhone: Voice Memos is a great option to dictate and send the recording to SpeakWrite for narration. The benefit to this vs. straight to SpeakWrite to dictate is Voice Memo allows one to leave the app while still talking and look at calls, text messages and emails in the phone. While in the SpeakWrite app one cannot do this.

The Notes app on the iPhone allows for talk to text narration. This can be emailed to oneself for ease of editing, copying, and pasting into assessments.

In Word one can use the voice Dictate under the Home tab to talk to type with easy editing, copying, and pasting into assessments.

Many CPS caseworkers use a dictation guide like this: [SpeakWrite Template](#).

Other technology tips:

Using your iPhone Hotspot and laptop or Surface Pro to log into ORKIDS to enter assessment activities while in the field in the car between locations.

Some people type as they interview assessment participants vs. taking handwritten notes.

Pro Tip: The Delivery office business expert can request worker SpeakWrite user information. This can be useful information in change management discussions.

Section 5

Use of MAPS, Case Aides, Safety Consultants and Regional ICWA Specialists

Mentoring, Assisting, Promoting Success (MAPS):

- Support supervisors with onboarding new SSS1s by reaching out ahead of the first day, greeting workers day one and ongoing check ins over the next several weeks, helping develop the training calendar and activities using the guides available
- Provide ongoing case consultation and support to assigned staff. Consultation will include, but not be limited to, review and discussion of the case plan and cultural considerations through individual conversation or group supervision; review and discussion of placement decisions, child protection issues and treatment intervention issues, etc.; and staff cases with caseworker and supervisor at critical case junctures.
- Support and review the work of assigned caseworkers ensuring compliance with policy and procedure.
- Provide orientation, training, and mentoring for new caseworkers through their first year of employment. Mentoring duties include assisting new employees across all program/practice areas with family engagement, completion of Child Welfare forms and reports, applying ICWA/ORICWA, writing court reports and providing court testimony, etc. This also includes supporting the individual workers training plan and meeting all training requirements in their first year of employment.
- Aid as needed in helping individual caseworkers understand OR-Kids documentation requirements and functionality as well as connecting them with MAPS to connect the staff to the 101 Trainings offered through Workday Learning. MAPS can support staff in knowing where to locate ORKIDS Online resource guides to help answer some of the more commonly known questions.
- Provide individual tutoring/training to assigned staff in specified areas when a need is identified.
- Assist the branch in identifying staff who may need additional support or coaching.
- Identify system issues and assist management in the development of effective and efficient office systems.
- Assist in the development and implementation of staff retention activities.
- Putting together resource packets like most helpful websites, SpeakWrite instructions and template.
- Develop training modules post Essential Elements (EE) in collaboration

with Consultants from PS and Perm. Go out with new workers post EE. Review 307s prior to submission to supervisors, host writing labs or clinics.

- Help review caseloads for assessments that may be appropriate for Documentation and Overdue Protocol
- Writing Lab/Office hours: this is designed to allow workers to come at set times to receive support in narrating assessment activities, domains, safety analysis, dispositions, etc.

[MAPS Do's & Don'ts](#)

[SSS1 Pretraining Activities](#)

[SSS1 On-Ramp Checklist](#)

Case Aides:

- Entering information from worker Speak Write or other dictations: assessment activities, 6 domains, FSS information
- Creating chronologies of CW history
- Filling out forms: School notification, school transportation, client transportation, placement forms, placement letter for foster parents, med cards, clothing vouchers, absent parent search referral, diligent relative search, referral information, consulate notifications, Early Intervention, Founded Disposition letter request, interpreter, or translation services request, BRS packets, family time request for to SSA unit.
- Other case specific tasks: Contact LEA for reports or assistance, print 307's and LEA reports sent from ORCAH, contacting CAC for appointments, request medical records, request reports from service providers, request courtesy interviews from other child welfare offices, complete purchase order requests, drop documents into OR-Kids filing cabinet
- Complete Searches: OR-Kids, Accurint, DHR, client index, EBT, OVERS, WAGE, eCourt, Jail roster, OR Offender search, TRACS, VWHR, Parole and Probation, OR DOC, DMV, ONE, Collateral contacts as requested by the worker
- Schedule legal staffings, agreement meetings note taking, DOJ staffing note taking.

Safety Consultants & Coordinators:

- Provide consultation and Safety Program support for Delivery office workers, primarily CPS related, in complex and/or sensitive

cases. Provide direct guidance to Delivery offices to identify and resolve case specific barriers by modeling best practice in achieving safety outcomes with the application of Rule and Procedure.

- Use data and metrics to help Delivery offices identify practice areas needing focus for improvement.
- Provide training and consultation in the areas of OSM, CPS, safety assessments, and continuous quality improvement processes.
- Interpret rules, policy, and procedures to ODHS staff, partners, and the public to support statewide consistency in the provision of the department's CPS program.
- Work in collaboration with MAPS to facilitate group case discussions (group supervision), writing labs, post Essential Elements learning sessions.
- Review completed 307s and provide feedback to the worker and supervisor including support of safety decision, disposition, and approval the assessment is complete.
- Provide performance feedback to CPS workers, supervisor, and program managers to help support professional growth and success.
- Support worker and supervisor recruitment and retention efforts.
- Help design and implement Delivery office processes to meet safety practice improvements and outcomes.
- Cross program partnership within the Child Welfare system and community.

Regional ICWA Specialists (RIS):

The Regional ICWA Specialists provide leadership, support, and direction in ensuring ODHS adheres to the intent and spirit of the federal Indian Child Welfare Act (ICWA) law, the Oregon Indian Child Welfare Act (ORICWA) law, regulates services to Indian children and families and are committed to advocating for equity and inclusion matters related to American Indian/Alaska Native (AI/AN) peoples.

When working alongside sovereign Tribal Nations and tribal citizens, the Regional ICWA Specialists can support supervisors and/or CPS workers with:

- Monitors, interprets, clarify agency policies and procedures to remove barriers and fulfill the intent and the spirit of ICWA and ORICWA with ODHS staff, AI/AN children and families receiving services with guidance, support, and direction from the Indian Child Welfare Act (ICWA) Consultants and the Senior ICWA Manager in the Tribal Affairs Unit and

with the nine federally recognized Tribes of Oregon and all other federally recognized Tribes in the United States.

- Supportive coaching and guidance to case workers assigned to an ICWA case.
- Conduct and participate in ICWA case staffings, such as support and guidance in coordination of Active Efforts staffings.
- Advise and assist direct service staff in case planning to best meet the needs of the child and family, per ICWA/ORICWA and support guidance of involved federally recognized Tribes.
- Support and maintain collaboration and partnership with federally recognized Tribes

Section 6

CPS Worker Transition Guide & Unattended Caseload

This guide was developed to outline the steps involved in facilitating a reasonable transition and start date when a CPS SSS1 transfers to another workload and the considerations that should be made for the families working with the caseworker, the current supervisor, and the hiring supervisor.

- Step 1:** Hiring supervisor informs current supervisor of plan to offer the recruited position to the CPS caseworker.
- Step 2:** Hiring supervisor offers to worker. Let's worker know the current supervisor is aware and a tentative set date will not be set until after the worker and current supervisor meet to go over the current caseload in detail.
- Step 3:** Worker informs current supervisor they have accepted the new position. Current supervisor and worker set supervision time to review the pending workload in detail. (This should be prioritized to occur within three working days.)
- Step 4:** Current supervisor and worker meet to review the workload and prioritize work. The current supervisor will document the how the workload will be prioritized. (This may take more than one meeting time depending on size of workload but should remain a priority). Support from a Safety Consultant and/or MAPS may be helpful. Things to consider: how many assessments are pending; what specific work must still be completed (face to face contacts still, collateral calls, SpeakWrite); where are assessment activities documented and how can it be shared for narrating; what collaboration is needed (Tribal Nation, LEA); and what notifications are required.
- Step 5:** After the workload has been reviewed, the current supervisor and worker must discuss possible start date that appears reasonable for the worker, and the families currently involved with the worker and the families awaiting a new worker. If both agree on a proposed reasonable start date, move to Step 7.
- Step 6:** If the worker is unwilling or unable to provide more than a two-week notice (or longer than it takes to get through background clearance and pay equity and other hiring steps) collaborate with your Program Manager and Human Resource Business Partner.

Step 7: The current supervisor communicates with the hiring supervisor and proposes the start date that was agreeable to the worker. If the hiring supervisor believes this proposed date is also reasonable and can be supported, the transition start date should be set and communicated. Notifications to caseworkers, families, and Tribal Nation collaborators can begin. The current supervisor or current worker will provide the Tribal Nation collaborators and families notice of a caseworker change by phone or email within 2 business days of the new worker assignment decision. If the hiring supervisor is not in agreement, move to next step.

Step 8: If the supervisors cannot agree on the start date, both supervisors must discuss their team needs and identify areas of compromise. Some things to consider:

- What pending work can transition with the worker and be completed while beginning the work in the new position?
- Who will oversee the completion of the pending work? (This should include decision making and final approvals.)
- Agree upon additional steps if the work does not get completed as planned, i.e., check-ins about weekly about progress with each other.
- What else can be done to support the worker's transition successfully so all teams and families are respected.

If supervisors agree after this discussion, the current supervisor will discuss this date with the worker and include the ideas discussed to support a successful transition. If supervisors do not agree, move to the next step.

Step 9: If the supervisors cannot agree, involve the Delivery office Program Manager (PM) for each Delivery office (if applicable). One supervisor could volunteer to email both PMs with the lack of agreement and ask for a discussion.

Step 10: Program managers will communicate with their respective supervisors to gain perspective and identify solutions attempted thus far. If no change in thinking leads to a resolution, both PMs and supervisors should meet to problem solve. If resolution is achieved, the agreement should be communicated with the worker. This may include updating any potential plans for the workload and seeking agreement on the updated date from the worker. If the worker is agreeable, set the start date. The current supervisor or current worker will provide the Tribal Nation collaborators and families

notice of a caseworker change by phone or email within two business days of the new worker assignment decision.

Step 11: If agreement cannot be reached or the worker does not agree, convene the participants from Step 10 for another meeting and consider consulting with a Human Resource Business Partner.

Step 12: If agreement cannot be reached or the worker does not agree, involve the Delivery District Manager(s), and repeat Step 10. If agreement cannot be reached, move to Step 13.

Step 13: Request discussion with Lacey Andresen. After discussion, a decision will be made. Notification must then be made to the worker, families, and Tribal Nation collaborators. The current supervisor or current worker will provide the Tribal Nation and families notice of a caseworker change by phone or email within two business days of the new worker assignment decision.

A lateral transfer transition should be prioritized with a five-business day turnaround. While this is occurring, the current supervisor and worker should start workload prioritization. It is critical to consider the families served during the transition planning.

The Unattended Caseload:

In the event a caseload is unattended (i.e., the previous worker is not available to provide information, the notes are limited, etc.) or the worker provides only two weeks' notice, the supervisor or program manager should immediately begin the task of prioritizing the workload (same or next day) and seek support from the Delivery Safety Consultant if needed. Safety Consultants, in collaboration with the supervisor, PM, and/or MAPS, can review information in ORKIDS, working files, scanned-in handwritten notes, etc. Safety Consultants may also be able to provide additional data analytics to help prioritize cases (assessments with infants under 12 months old, high Assignment Screening and Placement Scores, multiple assessments and allegations pending) and/or identify which cases may be appropriate for the Overdue Assessment Protocol or an Abbreviated Assessment.

If your worker is out for an unknown amount of time without having access to the worker work with your Human Resources Business Partner and OIS to gain immediate access to the worker's Outlook email, Teams, and calendar as well as the worker's desktop and h: drive. Begin combing for case related information including SpeakWrite documents, other dictations, communication LEA, parents, etc.

Section 7

Common OWL/Share Point Resources

CPS Resource Page

[OWL CPS Resource Page](#)

Office of Equity and Multicultural Services (OEMS)

[ODHS OEMS Resource Page](#)

[OEMS Language Access Resource Page](#)

Human Resources

[ODHS Human Resources Page](#)

[ODHS Human Resources Managers Page](#)

Child Welfare Equity, Training and Workforce Development

[ODHS Training, Equity, Workforce Development Resource Page](#)

[Required Trainings & Resources](#)

Tribal Affairs Page

[ICWA Resources – forms, upcoming events, other case resources](#)

[Contact Lists – TAU, Oregon Tribal Contacts, BIA ICWA Agents](#)

[Educational & Training Resources](#)

Future Section Considerations



These are some additional sections we would like to add to the toolkit over the next three to six months.

- Data literacy- what ORKIDS & ROM reports and how to rely on and support performance outcomes
- Managing initial and ongoing contacts
- ICWA/ORICWA- Collaboration with Tribal Nations, Active Efforts and Prevention, Protective Action Plans & Tribal Families, the supervisor's role
- Supervisor required approval points
- Sufficient safety assessment narrations
- Worker well-being and supervisor well-being

Your questions and feedback are welcomed. If you have thoughts about important future sections, we want to hear from you as well. Send your thoughts and questions to [Sonya Buchholtz](#).