Appendix

Appendix 1. Assessments and Plans Used in Practice

Brief Assessment & Screening to Inform, Connect and Support (BASICS)

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BRIEF ASSESSMENT & SCREENING TO INFORM, CONNECT AND SUPPORT (BASICS)

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Purpose of the BASICS

The Brief Assessment and Screening to Inform, Connect, and Support will be conducted during a first or second conversation with a family that has been screened in for OhioKAN services based on eligibility criteria. The goals of BASICS are to:

1. Collect baseline information about family needs and financial resources.
2. Determine whether family's needs are imminent and/or complex.
3. Identify which referrals to provide immediately.
4. Identify which domains to conduct additional assessments.

How the BASICS was Developed

None of the research-validated assessments reviewed as part of the literature review met the unique goals of the OhioKAN brief assessment. The OhioKAN Design Team, which includes stakeholders from child welfare, aging, formal and informal kinship, adoption and post-adoption, implementation, and evaluation, developed a draft brief assessment specifically designed for OhioKAN needs based on:

- Current kinship and adoption navigator program practices in Ohio,
- Domains commonly included in research-validated measures, and
- Federal and state legislation guiding kinship and adoption navigator services.

Nine core "domains" of potential need were identified by comparing and combining these perspectives. Each of the domains includes examples of specific services or supports that are relevant. Through the conversation with a family, the OhioKAN staff will assess the level of need based upon the family's expressed urgency and/or complexity of need. This does not denote the frequency of a particular need, but the severity of the need. Because this is a newly developed measure, the evaluation team will test reliability and validity to ensure that it has strong measurement properties and can be used for research/evaluation purposes, as required by the Title IV-E Prevention Services Clearinghouse.

Using BASICS in Practice

To administer BASICS, the OhioKAN staff will talk with an adoptive parent or kinship caregiver about their family and the reasons they reached out to OhioKAN. After informal conversation and rapport building, Navigators will tell families that OhioKAN can support kinship and adoptive families in a number of ways, depending on what the family needs. The Navigator will ask about the following...

BASICS Items

"Kinship and adoptive families sometimes face special circumstances that can make parenting even more challenging. I am going to list a few different areas, and I would like you to tell me whether this area is...

- 0 = Not challenging for my family; no additional support needed
- 1 = Somewhat challenging for my family; additional support could be helpful for us
- 2 = Very challenging for my family; we need support right away"

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Brief Assessment & Screening to Inform, Connect and Support (BASICS)

Domain	Examples	0 = Not a challenge	1 = Somewhat challenging	2 = Very Challenging	Not Answered
Caregiver/Family Needs Tab					
1. Basic needs	*Housing, utilities, transportation, clothing, food, furniture*				
2. Legal	*Questions about custody, delinquency court, other legal services needed*				
3. Caregiver Social	*Loneliness, no time*				

support	for self, respite, support groups				
4. Caregiver health	*Mental health, behavioral health, physical health, cognitive health, dental*				
5. Caregiver training/ education	*Caregiver parenting training, support for children with special needs*				
6. Family functioning	*Child/caregiver relationship, attachment, bonding, family relationships*				
Other Domain	*If Caregiver mentions something outside the domains listed above – captured with a narrative*				
Child Needs Tab					
1. Child care	*Locating care, accessing care, after school or summer programs*				
2. Education/Child Development	*Enrolling child in school, IEP/504*				

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	plan, school supplies, Early Intervention, Head Start				
3. Child Social Support	*Connections to peers and/or caring adults and mentors*				
4. Child health	*Mental health, behavioral health, physical health, dental, special equipment needs*				
Other Domain	*If Caregiver mentions something outside the domains listed above – captured with a narrative*				

Resources Tab

Does your family already have any of these resources in place? (Select options: Yes/No/Not eligible/Not Answered)

- Adoption Assistance (AA)
- Area Agency on Aging
- Free/reduced school meals
- Home Energy Assistance Program (HEAP)
- Kinship Caregiver Program (KCP)
- Kinship Permanency Incentive Program (KPIP)
- Medicaid
- Ohio Works First Child Benefits (OWF)
- Other medical insurance
- Post Adoption Special Services Subsidy (PASSS) Program
- Social Security death benefits
- Social Security Disability Insurance (SSDI)
- State Adoption Maintenance Subsidy (SAMS)
- Subsidized child care
- Subsidized housing
- Supplemental Nutrition Assistance Program (SNAP)
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Women, Infants, and Children (WIC)

Prior involvement with Kinship and Post-Adoptive services?
Yes/No

Name of Program/Agency
[text field]

Were urgent and/or complex needs identified?

Yes, complex

Yes, urgent

Yes, both urgent and complex

No, neither urgent nor complex

Support Plan

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Support Plan

Name of Kinship and Adoption Navigator:	
OhioKAN Region:	
Family Name/Service Episode ID:	
Date of first support planning meeting:	

People Involved in the Collaborative Support Plan	Family Role (child, adoptive parent, biological parent, kinship caregiver)
Narrative Summary	

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Current Family and Community Supports for Identified Needs

Family Supports	Relevant BASICS Domain	Support relevant to
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
Community Supports	**Relevant BASICS Domain**	**Support relevant to**
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.
	Choose an item.	Choose an item.

Referral Updates						
Area for Support/ Assistance *Brief description*	BASICS Domain	Binder Referrals Already Provided *if applicable*	New Referrals Needed *If applicable*	Were new referrals provided?	Was youth voice included?	Notes and Updates
1.	Choose an item.			☐	☐	
2.	Choose an item.			☐	☐	
3.	Choose an item.			☐	☐	
4.	Choose an item.			☐	☐	

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Action Steps Table

Area for Support/ Assistance Area	BASICS Domain	Action Step	Person Responsible:	Estimated Target Date	Was youth voice included?	Notes	Date Accomplished
1.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
2.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
3.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
4.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
5.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
6.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
7.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.
8.	Choose an item.			Click or tap to enter a date.	☐		Click or tap to enter a date.

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Our next meeting is:

Contact/Plan Check-In Schedule

Preferred Contact Method(s)	Frequency	Day or Time Preferences	People to Involve in Check-Ins
	Choose an item.		

Date	Updated referrals	Connected to a referral together	Updated action steps	Requested funding	Worked together to access benefits	Requested benefits coordinator support	Notes
Click or tap to enter a date.	☐	☐	☐	☐	☐	☐	
Click or tap to enter a date.	☐	☐	☐	☐	☐	☐	
Click or tap to enter a date.	☐	☐	☐	☐	☐	☐	
Click or tap to enter a date.	☐	☐	☐	☐	☐	☐	
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Support Plan Discussion Guide

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Support Plan Discussion Guide

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SUPPORT PLAN
DISCUSSION GUIDE

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Discussion Guides for Co-Developing the Kinship and Adoptive Family Collaborative Support Plan with the Family

The OhioKAN Collaborative Support Plan is a tool used to plan Collaborate Service Level. The Support Plan is designed to be co-developed through open-ended discussion with the caregiver or parent and should be revisited and updated at each meeting. This discussion guide provides suggested questions to better understand the somewhat challenging and very challenging areas the caregiver or parent identified during the BASICS assessment. The goal of the first interaction when providing Collaborate Service Level is to build rapport and trust with the parent or caregiver, ask follow-up questions based on what was shared in the BASICS, and learn more about the family's circumstances to co-develop a tailored Support Plan.

The Navigator's Role and Primary Skills

The Navigator's role in co-developing the Support Plan with the caregiver or parent is to facilitate their exploration of ways to address their identified needs, recognize their strengths and abilities, and identify what family and community supports they already have. The primary skills used may include appreciative inquiry and motivational interviewing.

Before starting the Support Plan discussion, be sure to reintroduce yourself if needed and re-explain your role using plain language, especially if children are present.

During the Support Plan discussion:

- ask open-ended questions
- listen closely
- make reflective statements to confirm understanding
- follow the caregiver or parent's lead, adjusting the pace and content of the discussion to be responsive to the emotional dynamics of the conversation
- take notes of the main points to fill out the Support Plan template
- orient the caregiver or parent to the Support Plan so that they understand what the next steps are and what to expect in their ongoing work

Framing the Discussion

The order of the Support Plan sections is flexible, though it is recommended you begin by discussing the reasons the caregiver or parent first contacted OhioKAN (information provided on the BASICS). You are encouraged to use your practice experience and follow the lead of the OhioKAN family when selecting a place to start. Depending on the family's circumstances, you should select the applicable sections/questions. The conversation and Support Plan should be tailored to the family's needs; you are not required to ask all the questions or use all the sections on the Support Plan.

As you frame questions, mirror the language OhioKAN families use about themselves, their relationships, and their situation. For example, if the caregiver describes the situation as temporary, you can say "staying in the home" rather than "living in the home". Rather than using the more general term of caregiver, you can identify the specific relationship of "grandparent" "auntie" "uncle" or whatever term the caregiver and child use to identify their relationship. You will see multiple options of words to use in parentheses, and you may develop your own way of phrasing based on what you think will resonate with the OhioKAN family and will create a positive strengths-based conversation.

Youth Involvement in Developing the Support Plan

It is best practice to involve youth in planning and making decisions that impact them because can give youth a sense of control and increase their engagement in services. When it is developmentally appropriate and appropriate to the needs of the family, you should always ask the parent/caregiver if they would like youth to be involved in developing the plan. Youth involvement is especially relevant to the domains of education/child development, child social support, and child health. Involving youth in the support/assistance portion of the conversation is not recommended, especially if the discussed areas are related to flex funding. Your conversation with the caregiver or parent about the BASICS should inform what areas for support or assistance are appropriate to discuss with the youth.

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How do I determine youth involvement in the discussion?

- Determine if youth involvement is developmentally appropriate. If you are unsure, ask the parent/caregiver.
- Ask the parent/caregiver if they would like the youth to participate in the conversation.
- Ask if there are identified needs that they would rather not talk about in front of the youth (e.g., financial support, caregiver health, caregiver social support).
- With the caregiver's permission, ask the youth if they would like to participate in the plan.
- Ensure the youth has an authentic choice, if the youth is hesitant, do not pressure

When a child is involved in the Support Plan, be mindful of how long they have lived in the caregiver's or parent's home as well as the relational dynamics the caregiver or parent reports and what you observe. The Support Plan may remind them of past trauma or sensitivities that could inform your approach to the discussion as well as identify

additional areas of support. The child is always welcome to leave the conversation, be mindful of both verbal and nonverbal cues that may signal the child is done.

After determining with the caregiver and family if the youth will be involved in the discussion, you can use the following prompts to engage them while co-developing the Support Plan:

1. What would you like us to know about you?
2. What are you interested in?
3. Are there things that are important to you that you want to be sure we are paying attention to?
4. What feels hard right now?
5. Can you tell us about any problems you are trying to solve that you would like our help with?
6. You may also want to ask questions to learn about how they are experiencing referrals that impact them (e.g., after school programs, health/behavioral health providers, etc.)

Discussion Guide: Exploring Personal Strengths and Family and Community Supports To build the Support Plan's family and community supports table and action steps table with the caregiver or parent, it may be helpful to also explore areas in their broader family and community networks that might be strengths and natural supports. You can explore personal strengths and supportive relationships by applying appreciative inquiry skills (suggested questions below) to have an open-ended conversation with the caregiver or parent. If appropriate to the circumstances of the family and support needs identified by the caregiver, you may consider developing together a network of support diagram.

Suggested questions to explore personal, family, and community strengths for caregivers/parents are outlined below:

1. Who do you feel like you and your family can count on?
2. Who helps you out when you need extra support?
3. What community groups or organizations are you already connected to?
4. What are you most proud of as a (family role – caregiver, parent, grandparent, aunt, uncle, cousin, etc.)?
5. How would you describe what's best about your (family or home)?
6. What do you think of as your most important personal strengths?
7. How would you describe what's best about your community?
8. Who outside of the family is important to you?
9. Tell me about a time you or your (family/household) experienced a challenge and how you addressed it?
10. What do you think of as you and your (family's/household's) most important strengths?
11. What do you think of as you and your community's most important strengths?

Tip: Be mindful of how the caregiver or parent characterizes their family or household and modify your questions as needed. OhioKAN serves the whole family, including a caregiver's or adoptive parent's biological child(ren).

Discussion Guide: Articulating Areas for Support or Assistance
The goal of the conversation is to co-develop a Support Plan by learning more about the reasons the caregiver or parent first contacted OhioKAN and the BASICS domains they identified as "very challenging" and "somewhat challenging" and to make plans to address these challenges together. Co-developing the Support Plan is a way to build trust and accountability with the caregiver or parent through this discussion to support them with their unique circumstances. If the caregiver or parent's reason for contacting OhioKAN relates to flex funds, the conversation should focus initially on those reasons for requesting this support before exploring other potential needs and include clear expectations of the steps involved in the process and how long it may take.

Exploring the BASICS Domains
To open the conversation with the caregiver or parent, begin by asking about the BASICS domains they reported as "somewhat challenging" or "very challenging" and asking follow-up questions to learn more about their support needs and which are most important to them. If you have not already, you may also want to review the binder referrals with them and learn whether they have been able to access those referrals. Remember, you can always make different or additional referrals and you can offer to contact a provider with a family if they would like your assistance.

Some suggested prompts are below. Questions will need to be tailored to the unique circumstances of the family. The caregiver or parent may choose to opt out of answering certain questions.

1. You identified [BASICS domain] as very challenging. Can you tell me a little more about that? Would you still describe it as very challenging?
2. Tell me more about what first led you to contact OhioKAN.
3. Are there other areas for support or assistance that are especially important to you?
4. What support or assistance can we provide that would be most helpful to you?
5. How important is this area of support or assistance to you?
6. I see that you identified financial assistance as the primary reason for contacting OhioKAN. Can you tell me a little more about that? Are you interested in exploring other forms of assistance from OhioKAN?

Repeat this process as needed until you and the caregiver or parent feel that enough information has been gathered on the "challenging" and "very challenging" domains indicated in the family's BASICS.

Exploring other Family Needs

After going through the domains indicated as "very challenging" and "challenging" on the family's BASICS, you may also explore other areas of support the caregiver or parent may be interested in sharing. Follow the parent or caregiver's lead and assess their level of comfort with the conversation before exploring additional areas. The below questions are suggestions for ways to explore additional needs and should be tailored to the family's unique circumstances:

1. Are there other areas of support that are important to you that you would like to share?
2. Are there other problems you are trying to solve that you would like our help with?

Discussion Guide: Developing Action Steps

Developing action steps is a critical piece of the Support Plan as it lays the groundwork for the family's expectations for OhioKAN's Collaborate support. This discussion guide is closely related to the next guide on exploring personal strengths and family and community supports as action steps build on and leverage the caregiver's or parent's strengths. The below guiding questions are a starting point for this portion of the Support Plan conversation, but it is not an exhaustive list. Questions will need to be tailored to the unique circumstances of the family.

1. During our conversation, it sounds like you've identified [_____] as an area for support or assistance. What would it look like to see this problem solved?
   1. If you could wave a magic wand and make this challenge go away, what would change?
   2. What will it take to see this problem solved?
   3. How important is this area for support to you?
2. I'd like to understand what you've tried before to address this area. Are there resources or services in your community you've accessed? What was your experience with them?
   1. Can you tell me about any steps you've taken to address this challenge previously?
3. Can we build on resources you may already have in your network to support with this challenge?
   1. Who in your network has been helpful with this area?
   2. Who do you turn to for support?
   3. Who is available to you when you need help?
4. Can we explore what you found meaningful about our conversation so far?
   1. How would you describe your greatest strength to support change?
   2. How would you describe your hope and biggest reason for change?
5. What are some steps you'd like to accomplish to address this area for support?
   1. How confident are you that you can accomplish this step?
   2. How ready are you to take this step?
   3. How difficult do you think taking this action step will be?
   4. How much energy do you think this step will take?
   5. How much support do you feel you will have for taking this step? Support might be from me, your family, your community.
6. Let's explore how I can partner with you to solve this problem and support you with your action steps. What steps would be helpful for me to take? How much support do you feel you will need to move forward?
   1. Would a referral to [service] address this area for support?
   2. I see you've identified enrolling in [benefit program] – can I help you with completing the necessary forms?
   3. Would it help if I introduce you to [service provider]?
   4. Would it help if I attended the [appointment, school meeting] to support you?

Collaborate Service Level build on the referrals offered through the Connect Service Level. In addition to providing referrals, you can also offer the following services and supports:

- **Warm hand-off referrals**
  - You can offer to call an agency with a family on the phone, or call an agency on a family's behalf to make the initial introduction
- **Assistance with an application**
  - You can offer to assist a family with an application for a social service benefit (SNAP, childcare, SSI, etc.) virtually or in person if there are barriers to completing the application virtually
- **Benefits coordination**
  - If the family has questions about eligibility, a benefits appeal process, or would like support with an application, or other benefits challenges that require more specialized expertise, you can offer to connect them with the OhioKAN Benefits Coordinator
- **Flexible Funds and Hard Goods**
  - If a family needs hard goods like clothing, beds, car seats, etc., for their kinship or adoptive children, you can offer to directly link families to organizations and agencies for short-term assistance in obtaining these items, and follow up support
  - If you have exhausted all community-based options for a family to meet a need for funds or hard goods, you can apply for flexible funds and hard goods through OhioKAN
- **In-person visiting**
  - In select situations, you can offer to join a family in a meeting with the child's school, social worker, etc. in the community to provide extra advocacy for the family
  - If there are barriers to providing virtual support, you may also offer to visit the family in their home to assist with applications, etc.
- **Collaboration with caseworker, state, or local agencies**
  - You can offer to coordinate with the family's case worker, if they have one, or reach out to local/state agency contacts to advocate alongside them