

Family -Centered Shared Care Planning Assessment (FCSCPA)

A quality improvement tool to benefit children and youth with special health care needs (CYSHCN)

Background

Shared Care Planning is a family-centered, team-based coordinated care process. A team is comprised of family members of children, or youth, with special health care needs (CYSHCN) working alongside representatives from entities such as primary care, public health, education, behavioral health, and other community services. **It is successful only when families and/or youth are regarded as equal members of the shared care planning team.**

High quality shared care planning results in a plan that offers families a clearer path to coordinated care. They leave shared care planning meetings with a document describing how they, and their child's team, will move their goals forward, supported by commitments from professionals. Throughout the process team members develop new insights and innovations, taking time to discover and address previously unrecognized needs and barriers.

The American Academy of Pediatrics¹, Maternal and Child Health Bureau in the US Department of Health and Human Services², and the National Academy for State Health Policy³ strongly support the concept of team-based care coordination. A recent study⁴ led by Jeanne McAllister, a researcher from Indiana State University, further shows strong evidence supporting the value of family-centered, team-based care coordination teams in meeting family needs, empowering families, and reducing worry about their child's well-being.

Why this tool?

This tool asks teams to explore ten core values of patient/family-centered shared care planning. These values were borne from more than thirty years of providing technical assistance to community-based, cross-systems health teams that include families. Team members can use this tool to reflect on their Shared Care Planning process through a family-centered lens. The results will provide insight on strengths, areas for improvement, and help teams set goals for quality improvement.

Continuous Quality Improvement

This tool may be used on a regular or recurring basis to continually improve the shared care planning process.

Instructions to Public Health Staff

Step 1: Think about who to invite to complete this assessment. This tool should be completed by consensus of two or more team members.

Step 2: Review each of the 10 core values. Discuss the items under each core value and rate by consensus. Take notes as you go along and respond to as many items as possible.

Step 3: Use the ratings to prioritize core values that your team can improve upon.

Notes

- If you and/or your team are not able to answer an item, select “Don’t Know.”
- Remind the reviewers to address the current state of shared care planning.
- Make sure all reviewers have the same understanding of each item before scoring.
- Encourage active participation and honesty.
- Encourage teams to acknowledge areas that could be improved and celebrate successes when reviewing results.

¹ <https://publications.aap.org/pediatrics/article/133/5/e1451/32796/Patient-and-Family-Centered-Care-Coordination-A>

² [https://publications.aap.org/pediatrics/article/149/Supplement 7/e2021056150C/188225/A-Blueprint-for-Change-Guiding-](https://publications.aap.org/pediatrics/article/149/Supplement%207/e2021056150C/188225/A-Blueprint-for-Change-Guiding-)

³ <https://www.nashp.org/national-care-coordination-standards-for-children-and-youth-with-special-health-care-needs/#toggle-id-4>

⁴ [https://www.pediatricnursing.org/article/S0882-5963\(18\)30109-X/fulltext](https://www.pediatricnursing.org/article/S0882-5963(18)30109-X/fulltext)

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https://amchp.org/database_entry/family-centered-shared-care-planning-assessment-tool/

INITIAL INFORMATION

Date completed: _____

Who are the people that participated in this assessment?

Name	Organization	Role

RESPOND AFTER YOU HAVE COMPLETED THE ASSESSMENT

What core values did you identify opportunities for technical or fine-tuning assistance?

What core value will you first focus on, and why?

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Core Value 1: Equitable. The Shared Care Planning team actively applies an equity lens to its work, acknowledging that historically, racism has pervasively and negatively impacted health care for children and families.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

Item	Never	Some of the time	Most of the time	Always	Don't know
a. The team ensures that resources and services for children and families of color, LGBTQIA+, and those experiencing disability are delivered equitably.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The team approaches its work with cultural humility by striving to understand and honor families' cultural values, beliefs, and practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. The team considers families and/or youths' preferred language, level of comfort with technology, access to technology, and literacy when offering the written shared care plan, resources and guidance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. The family chooses the meeting mode whether that be telehealth or in-person.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. When meetings are virtual, the family's preference for cameras on or off is honored.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. During the shared care planning meeting, the team consistently utilizes trained or certified interpreters in the families and/or youths' preferred language.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. During the shared care planning meeting, the team makes accommodations for disabilities as needed for families and/or youth to attend meetings and participate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. During the shared care planning meeting, each member of the team uses plain language and terms.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - h	0	0	0	0	0
Response option value	1	2	3	4	NA
Product of response option sums and values	0	0	0	0	NA
Core Value 1 Point Total	0				
Overall Core Value 1 Percentage	0.0%				

Interpretation of Core Value Percentage
 0 – 60% = We are still learning about this Core Value and could use some technical assistance.
 61 – 80% = We have been practicing this Core Value and could use some fine tuning assistance.
 81 – 100% = We are confident in our implementation of this Core Value.

Team Notes

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Core Value 2: Respectful and trusting. Shared Care Planning is dependent on mutual trust and respect among all the team members.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. Team members recognize families and/or youth as equal members of the Shared Care Planning team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. During the shared care planning meeting, the team carefully considers all perspectives and input.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. When meetings are scheduled, families' and/or youth's schedule is always taken into consideration.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. During the shared care planning meeting, if differences of opinion occur while creating the care plan, team members respectfully negotiate so that families and/or youth goals are achieved.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. During the shared care planning meeting, the team makes recommendations tentatively. It takes time to check with families and/or youth to make sure the recommendations fit.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - e	0	0	0	0	0
Response option value	1	2	3	4	NA
Multiply response option sums X response option values	0	0	0	0	NA
Core Value 2 Point Total	0				
Overall Core Value 2 Percentage	0.0%				

Interpretation of Core Value Percentage

- 0 – 60% = We are still learning about this Core Value and could use some technical assistance.
- 61 – 80% = We have been practicing this Core Value and could use some fine tuning assistance.
- 81 – 100% = We are confident in our implementation of this Core Value.

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Core Value 3: Transparent. The process of Shared Care Planning, and the plan itself, are continuously accessible to families and/or youth.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. During the shared care planning meeting, every effort is made to ensure that the care plan is visible to everyone.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. During the shared care planning meeting, the team makes decisions in partnership with families, not outside of the meeting; and, families and/or youth approve, all substantive changes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Families and/or youth have continuous access to the care plan over time, including updates.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. The team is explicit and clear about how families and/or youth can use the shared care plan to communicate their priorities and needs in other settings (e.g. schools, healthcare, home visiting).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - d	0	0	0	0	0
Response option value	1	2	3	4	NA
Multiply response option sums X response option values	0	0	0	0	NA
Core Value 3 Point Total	0				
Overall Core Value 3 Percentage	0.0%				

Interpretation of Core Value Percentage

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Core Value 4: Responsive. The Shared Care Planning process is fluid and flexible. It responds to families' and/or youth needs and concerns. Neither process nor the participants are rushed.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. During the shared care planning meeting, ample time is provided for families and/or youth to share their stories and concerns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. During the shared care planning meeting, the facilitator gives team members ample time for conversation, creative thinking, and problem-solving.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. During the shared care planning meeting, team members offer new, or overlooked, information about the child's health and development that can lead to the discovery of previously unknown needs and possible solutions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Team members actively share knowledge about systems, services, and resources that provide new options and solutions to achieve the families' and/or youth goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - d	0	0	0	0	0
Response option value	1	2	3	4	NA
Multiply response option sums X response option values	0	0	0	0	NA
Core Value 4 Point Total	0				
Overall Core Value 4 Percentage	0.0%				

Interpretation of Core Value Percentage

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Core Value 5: Trauma-informed. The team recognizes that racism and prejudice are traumatizing. The team understands that the barriers families face can be traumatizing. The team members are aware and responsive to the possibility that others on the team may have experienced trauma.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. When families choose to share them, the team takes time to hear and acknowledge the families' and/or youths' experiences with personal and institutional racism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The facilitator invites team members from identity-based groups such as racial, ethnic, cultural, spiritual, and LGBTQIA+, per the families' wishes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Team members give families the option to tell their stories without putting them on the spot to do so.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. The team prioritizes the families' and/or youths' goals, ahead of other team members' goals, to build trust and avoid re-traumatization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. When families choose to share them, the team takes time to hear and acknowledge their experiences navigating systems, including those that have been difficult or traumatic, and works to repair them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Before family stressors (social, financial, housing needs, etc.) are addressed in a team meeting, the facilitator and families will have discussed and agreed to talk about them.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - f	0	0	0	0	0
Response option value	1	2	3	4	NA
Product of response option sums and values	0	0	0	0	NA
Core Value 5 Point Total	0				
Overall Core Value 5 Percentage	0.0%				

Interpretation of Core Value Percentage

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61 – 80% = We have been practicing this Core Value and could use some fine tuning assistance.

81 – 100% = We are confident in our implementation of this Core Value.

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Core Value 6: Strengths-based. Shared care plans recognize the strengths of families, children, and youth, and builds on them to move the care plan forward.⁵

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. Shared Care Plans document specific youth and/or families' strengths that can be leveraged toward accomplishing goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. During the shared care planning meeting, the facilitator invites families and/or youth to share their long-term goals or hopes for the youth with the team.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. During the shared care planning meeting, team members who know the families and/or youth affirm their strengths, skills and knowledge.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. During the shared care planning meeting, families and/or youth take on feasible tasks from the care plan and are supported by team members, when necessary, to complete the tasks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - d	0	0	0	0	0
Response option value	1	2	3	4	NA
Multiply response option sums X response option values	0	0	0	0	NA
Core Value 6 Point Total	0				
Overall Core Value 6 Percentage	0.0%				

Interpretation of Core Value Percentage

- 0 – 60% = We are still learning about this Core Value and could use some technical assistance.
- 61 – 80% = We have been practicing this Core Value and could use some fine tuning assistance.
- 81 – 100% = We are confident in our implementation of this Core Value.

Team Notes

⁵ https://www.chcs.org/resource/incorporating-racial-equity-into-trauma-informed-care/?utm_source=CHCS%2BEmail%2BUpdates&utm_campaign=aa74f

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Core Value 7: Empowering. The Shared Care Planning process contributes to the families' and/or youths' knowledge and skills to advocate for their needs. When team members share power and offer information and choices, it can facilitate healing from trauma and prevent re-traumatization.⁵

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. The team completely describes the process of shared care planning and the benefits to families prior to beginning meeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Families and/or youth have at least one member of the team who serves as a touchpoint for questions, concerns, and support.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. The facilitator offers families and/or youth the option to facilitate their own shared care planning meeting, if desired.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. During the shared care planning meeting, the team provides ample opportunities for families and/or youth to ask questions, propose alternatives, or disagree.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Families and/or youth make all final decisions related to the care plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. In addition to the families and facilitator, other team members volunteer to take on tasks in the care plan during the shared care planning meeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. The facilitator or other team members ask families and/or youth to give feedback about the Shared Care Planning experience.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - g	0	0	0	0	0
Response option value	1	2	3	4	NA
Product of response option sums and values	0	0	0	0	NA
Core Value 7 Point Total	0				
Overall Core Value 7 Percentage	0.0%				

Interpretation of Core Value Percentage

- 0 – 60% = We are still learning about this Core Value and could use some technical assistance.
- 61 – 80% = We have been practicing this Core Value and could use some fine tuning assistance.
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Team Notes

⁵ https://www.chcs.org/resource/incorporating-racial-equity-into-trauma-informed-care/?utm_source=CHCS%2BEmail%2BUpdates&utm_campaign=aa74f

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Core Value 8: Validating and supportive. The team values families' and/or youths' wisdom. They look for opportunities to help families and/or youth find the additional supports they want.⁵

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. Families and/or youth are acknowledged for their expertise in identifying their child's needs and care.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Team members actively listen to and acknowledge families and/or youth needs and concerns.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. The team asks about both families' and youth well-being and their needs for support.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. The team helps families and/or youth, who desire it, find peer support in ways that reflect their cultural and language preferences. ²	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - d	0	0	0	0	0
Response option value	1	2	3	4	NA
Multiply response option sums X response option values	0	0	0	0	NA
Core Value 8 Point Total	0				
Overall Core Value 8 Percentage	0.0%				

Interpretation of Core Value Percentage

- 0 – 60% = We are still learning about this Core Value and could use some technical assistance.
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Team Notes

5. https://www.chcs.org/resource/incorporating-racial-equity-into-trauma-informed-care/?utm_source=CHCS%2BEmail%2BUpdates&utm_campaign=aa74

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Core Value 9: Efficient. The Shared Care Planning process is efficient for everyone and families feel it is a good use of their time. The right people are invited to the table at the right time, resulting in families and/or youth coming away with a powerful tool they can use to achieve their goals.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. The shared care planning meeting includes the "right people" to enact the plan, including those with pertinent knowledge, relationships, or administrative authority.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Families and/or youth are encouraged to invite whomever they determine would be helpful to the process including extended family, peer support, and non-traditional partners such as coaches, faith leaders, school bus drivers, traditional healers, and daycare providers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Shared care planning meetings begin with a clear statement that the team is there to identify and break down barriers that are impeding progress toward the youth and families' goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. During the shared care planning meeting, the team reaches consensus on the number and feasibility of goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. All team members share responsibilities for tasks on the care plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Team members' next steps are clearly summarized at the end of each meeting.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. The team maximizes the efficiency of the Shared Care Plan by reminding and encouraging families to share it with other providers who need to know the information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. The team reconvenes as needed to evaluate progress or make changes to the care plan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - h	0	0	0	0	0
Response option value	1	2	3	4	NA
Product of response option sums and values	0	0	0	0	NA
Core Value 9 Point Total	0				

Overall Core Value 9 Percentage	0.0%
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Core Value 10: Rewarding. Shared Care Planning is **rewarding**. It is collaborative, optimistic and innovative.

Instructions: Please check one response per row. Checking more than one response will invalidate your scoring.

	Never	Some of the time	Most of the time	Always	Don't know
a. Team members demonstrate enthusiasm for the work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. During the shared care planning meeting, the team documents and celebrates their successes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. The team members completing this team assessment (FCSPA) perceive that the benefits to engaging in the shared care planning process outweigh the costs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Scoring (Autocomputes after you enter your responses)

Sum of each response option for rows a - c	0	0	0	0	0
Response option value	1	2	3	4	NA
Product of response option sums and values	0	0	0	0	NA
Core Value 10 Point Total	0				
Overall Core Value 10 Percentage	0.0%				

Interpretation of Core Value Percentage

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