

# Utilizing the Family Development Matrix

## *For Program Planning and Evaluation*

In our field we constantly struggle we know we help families, but how can we show others? How do we document, for ourselves, for the families, and for policymakers and funders, the outcomes of our work?

There's no way to capture fully, on paper, each family's strengths, challenges, and goals. However, the Family Development Matrix is a tool that can help to identify these complex qualitative realities, thereby providing valuable longitudinal, participant level, information for use in program} agency, and community needs assessment, planning, evaluation, and resource development.

### *How the Family Development Matrix Works*

In the Family Development Matrix, eleven Outcome Categories (or domains) run across the top, referring to areas of family life—Shelter, Food and Clothing, Transportation and Mobility, Health and Safety, Social and Emotional Health and Competence, Finances, Family Relations, Community Relations, Adult Education and Employment, Child Education and Development, and Immigration and Resettlement. Five Status Levels run up the side of the chart, ranging from In-Crisis (1), At Risk (2), Stable (3), and Safe/Self-Sufficient (4) to Thriving (5). For each Status Level several "Indicators" are listed—specific, measurable facts that the worker and family can use in determining the family's current level of functioning in that Outcome Category. Caseworkers, often in partnership with family members, work to document a family's level of functioning at regular intervals over time across several domains of a family's life. These "scores" can then be charted and the resulting line graphs developed to "feed back" information to all players.

Many agencies do not collect data on all eleven Outcome Categories, but only those that make sense for the families

they serve. For instance, a counseling agency may choose not to collect information on Child Education and Development. However, to adequately capture sufficient information, at least three categories should be used. Various categories can then be compared to each other to see if and how they relate.

The "In Crisis" and "At Risk" Status Levels are considered (Growth Levels. This means that if a family has been assessed at one of these levels in an Outcome Category, this is a Category that needs to be addressed. The "Stable", "Safe/ Self-Sufficient" and "Thriving" Status Levels are Maintenance Levels, meaning that families assessed at these levels may choose whether to work on progressing to a higher level in that Outcome Category or to maintain that level for the time being and focus on other areas.

Sometimes a family and worker may decide to temporarily forego work on one level as a strategy in addressing another. For example, a family with a special needs child may choose to remain "In Crisis" in Housing or Transportation in order to access services for their child that would put them at "Stable" for Child Education and Development. Using the Family Development Matrix gives the family and worker a more global view of the family's circumstances that allows such strategizing to take place.

The Family Development Matrix is frequently used in a three-step process:

The case manager meets with family members to determine baseline scores for each of the Outcome Categories on which they will be working;

Regular subsequent meetings take place where the "goals" established at the previous meeting are revised as appropriate, and a new "plan" devised for implementation until the next meeting;

Services end, due to the success of the family, the family's dropping out of the program, or the end of time-limited services.

The worker and client use the baseline data to make a plan. Completing the matrix together, they then develop time-limited outcomes upon which to work. This process also provides the worker and client a visual picture of both areas they need to address and the strengths they may be able to tap in working on problems.

Every time worker and client meet after the initial interview, they revisit the matrix to document change that has occurred since the last time they met. After reviewing and reflecting upon the progress (or lack thereof), they assign new scores and revise the plan for the next time period accordingly. This systematic "review and revise" structures the meetings, the partnership in assisting the family toward self-sufficiency, and the documentation of a family's work.

The type of services offered - educational, clinical, crisis needs, I & R. or intensive or long-term case management - will determine how often the matrix is completed to reassess a family's situation. For some it will be weekly, for some once a month, for others once a

quarter. If the relationship is relatively long-term, once a month is best but every three months is workable. You need to balance what works best for your client and your agency.

### ***Advantages of using the Family Development Matrix***

The Family Development Matrix allows an agency to work from a strengths, rather than a "deficit" model, documenting where a family is thriving as well as where it needs support and allowing those using it to identify strengths from which to start addressing needs.

The Family Development Matrix also combines both a process that encourages skill-building in a program participant, and the development of outcomes that enable the measuring of family progress. This long-term documentation of a family's process in achieving mutually determined

outcomes allows the worker and family to look for patterns and pitfalls, so they can learn from the past to better plan for the future.

Last but not least, the Family Development Matrix facilitates family ownership of their efforts. The caseworker becomes the assistant in helping them set and work toward short and long-term goals. This aids the family in taking both credit and responsibility for their decisions and actions.

Tracking families' journeys over time in several of the Family Development Matrix Outcome Categories can be an enlightening process for the family, case manager, agency, and others. In aggregate form, it also provides a powerful "data set" for needs assessment, program planning, and evaluation, and soliciting funds for future work.

### ***urrent Work on Reliability and Validity***

The Family Development Matrix is one of three matrices that make up the California Matrix Model. The other two are called the Agency Development Matrix and the Community Scaling Tool. While work is being done with the Agency Development Matrix and the Community Scaling Tool, the Family Development Matrix is the component currently most frequently used. In California, Community Action Agencies and Healthy Start offer the Family Development Matrix as an evaluation tool, and some counties use it for reporting on Family Preservation and Support and other programs.

For those hesitant to use the Family Development Matrix because the instrument's reliability and validity have not been tested, the Institute for Community Collaborative Studies at California State University Monterey Bay is partnering with The National Center for Family Centered Practice and the Packard Foundation to evaluate and resolve issues related to the reliability and validity of this new tool.

For more information regarding the Family Development Matrix, visit the Institute for Collaborative Studies' website: <http://iccs.monterey.edu/community>

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