

FOR PROFESSIONALS

Professional Worksheet & Planning Collection

Clinician Resources • Facilitator Training • School Resources • Program Licensing • Professional Training

Purpose

A practical collection for clinicians, facilitators, educators, school teams, program partners, and professional trainees using Ethos Shoreline concepts and programs.

Use these tools for planning, reflection, implementation, supervision, consultation, and quality improvement. Adapt them to the professional's scope of practice, setting, applicable law, organizational policy, and the specific needs of participants.



PRACTICAL TOOLS FOR STRONGER FAMILIES, HEALTHIER CONNECTION, AND GROWTH

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- 30-Day Practice Change Tracker
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Professional-use note: These worksheets are educational and organizational tools. They do not replace clinical judgment, formal assessment, informed consent, supervision, legal consultation, or organizational policy.



Clinical Case Conceptualization Map

Organize presenting concerns into a coherent, strengths-based working formulation.

Client / Family ID:

Date:

Presenting Concerns

What brought the client/family to treatment? Include functional impact.

Strengths & Protective Factors

What is already working? Who/what supports resilience?

Patterns & Maintaining Factors

Consider triggers, avoidance, reinforcement, family interaction, EF demands, environment, trauma/stress, and developmental factors.

Working Hypotheses

What appears to connect the concerns? What still needs assessment?



Initial Treatment Priorities

Identify 1–3 priorities and why they matter now.



Executive Function Clinical Snapshot

Quickly map functional executive-functioning strengths and challenges.

Impulse Control	1	2	3	4	5
Working Memory	1	2	3	4	5
Emotional Regulation	1	2	3	4	5
Organization	1	2	3	4	5
Planning / Prioritizing	1	2	3	4	5
Task Initiation	1	2	3	4	5
Self-Monitoring	1	2	3	4	5
Cognitive Flexibility	1	2	3	4	5
Follow-Through	1	2	3	4	5

Highest-Impact EF Challenges

Which skills are causing the greatest impairment across home, school, work, or relationships?



Environmental Supports

What external structures, cues, routines, accommodations, or co-regulation supports are currently available?

Next Clinical Target

Choose one EF skill and one observable behavior to address.



Family Systems & Roles Map

Explore patterns of voice, responsibility, connection, boundaries, and belonging.

Family Members & Roles

List members and the roles they appear to occupy.

Voice

Who is heard easily? Who struggles to speak or be heard?

Responsibility

Who carries too much? Who carries too little? What responsibilities are unclear?

Connection & Repair

How does the family reconnect after stress or conflict?

Clinical Focus

What system-level shift could improve functioning without blaming one member?





Session Planning Worksheet

Translate goals into a focused, practical session.

Client / Family:

Session Date:

Primary Goal for Today

What should be different by the end of this session?

Opening Check-In

Key symptoms, functioning, risk/safety issues, progress, or changes to assess.

Interventions / Activities

What will you do and why does it fit the treatment goal?

Practice / Homework

What specific skill or action will occur between sessions?

Next Session Bridge



What should be reviewed or continued next time?



Intervention-to-Goal Alignment

Check that interventions clearly connect to treatment goals and functional needs.

Target Problem / Functional Impairment

Describe the specific problem being addressed.

SMART Goal

State the measurable treatment goal.

Selected Intervention

What intervention will be used?

Clinical Rationale

How does the intervention reasonably support the goal?

Evidence of Progress

What observable or reported change will indicate movement?



Progress & Outcome Review

Pause periodically to determine what is changing and what needs adjustment.

Changes Since Baseline

Symptoms, functioning, relationships, routines, school/work performance, or coping.

Goals Showing Progress

What has improved? What evidence supports that conclusion?

Goals Stalled / Worsened

Where is progress limited? What barriers are present?

Plan Adjustment

Continue, modify, intensify, refer, coordinate, or reassess.



Clinical Reflection / Consultation Prep

Prepare focused questions for supervision, consultation, or peer review.

Case Question

What specifically do I want help thinking through?

What I Know

Relevant facts, assessment data, client goals, and observed patterns.

What I May Be Missing

Biases, assumptions, cultural/developmental factors, system dynamics, risk, or alternative hypotheses.

Consultation Questions

List 2–4 concrete questions.

Action After Consultation

What will I do differently or investigate next?



Facilitator Readiness Self-Assessment

Identify strengths and development needs before leading an Ethos Shoreline program.

Program Knowledge	1	2	3	4	5
Group Facilitation	1	2	3	4	5
Emotional Safety	1	2	3	4	5
Managing Conflict	1	2	3	4	5
Inclusive Communication	1	2	3	4	5
Time Management	1	2	3	4	5
Boundaries / Scope	1	2	3	4	5
Referral Awareness	1	2	3	4	5

My Strongest Facilitation Skills

What do I already bring to the role?



Skills I Need to Strengthen

What should I practice before leading?

Readiness Action Plan

Training, observation, rehearsal, consultation, or materials review needed.



Program Session Preparation

Prepare each session with purpose, materials, pacing, and participant needs in mind.

Program / Session:

Date:

Session Objectives

What should participants understand, practice, or leave with?

Materials & Setup

Handouts, slides, room/virtual setup, supplies, accessibility needs.

Key Teaching Points

The 3–5 ideas that must be communicated clearly.

Practice Activity

How will participants apply the concept during the session?



Potential Challenges

What may require adaptation or additional support?



Group Safety & Engagement Plan

Create conditions that support participation, dignity, and appropriate boundaries.

Group Agreements

Confidentiality expectations, respectful communication, participation, time, and boundaries.

Engagement Strategies

How will quieter, hesitant, or overwhelmed participants be invited in without pressure?

Emotional Safety

How will strong emotions, disclosures, or conflict be handled within scope?

Escalation / Referral Path

Who is contacted when needs exceed the educational program or facilitator role?



Facilitation Skills Observation Rubric

Use for self-review, peer observation, coaching, or training.

Clear Instructions	1	2	3	4	5
Warmth / Rapport	1	2	3	4	5
Pacing	1	2	3	4	5
Participant Engagement	1	2	3	4	5
Reflective Listening	1	2	3	4	5
Boundary Management	1	2	3	4	5
Content Accuracy	1	2	3	4	5
Application to Real Life	1	2	3	4	5

Observed Strengths

Specific behaviors that supported learning.



Growth Opportunities

Specific behaviors to adjust or practice.

One Priority for Next Session

Choose one concrete improvement.



Challenging Moments Response Planner

Plan grounded responses to common facilitation challenges.

Participant dominates discussion

What will I say/do? What boundary or support is needed?

Participant disengages

What will I say/do? What boundary or support is needed?

Conflict between participants

What will I say/do? What boundary or support is needed?

Strong emotional disclosure

What will I say/do? What boundary or support is needed?

Question outside facilitator scope

What will I say/do? What boundary or support is needed?

Group running behind schedule

What will I say/do? What boundary or support is needed?





Facilitator Debrief & Fidelity Check

Review what happened after each session and protect program quality.

What Went Well

Content, engagement, timing, activities, or participant response.

What Was Adapted

What changed from the planned curriculum and why?

Core Elements Delivered

Which required concepts/activities were completed?

Follow-Up Needs

Participant questions, referrals, materials, or communication.

Next-Time Adjustment

One practical improvement for the next session.



Student Strengths & Barriers Profile

Build a balanced picture of the student before selecting supports.

Student Strengths & Interests

Academic, relational, creative, behavioral, extracurricular, or personal strengths.

When the Student Does Best

Classes, times, environments, adults, routines, or task types.

Primary Barriers

Attention, anxiety, transitions, academic skill gaps, EF demands, sensory/social factors, attendance, etc.

Student Voice

What does the student say is hard? What do they think would help?

Priority Support

What is the smallest high-impact change to try first?





School Avoidance / Re-Engagement Map

Identify patterns that may be maintaining school avoidance and build gradual re-entry supports.

What Happens Before School Difficulty?

Times, classes, people, sensations, thoughts, tasks, transitions, or events.

What Happens During Avoidance?

Behaviors, emotions, physical symptoms, family responses, school responses.

What Happens After?

Short-term relief, missed work, conflict, attention, increased anxiety, or other consequences.

Protective Factors / Successful Moments

When has attendance or participation gone better?

Next Re-Engagement Step

Define one realistic, measurable step toward participation.





Executive Function Classroom Support Planner

Match classroom supports to the executive-functioning demand.

Working Memory

Observed difficulty + support to try:

Task Initiation

Observed difficulty + support to try:

Organization

Observed difficulty + support to try:

Planning

Observed difficulty + support to try:

Time Awareness

Observed difficulty + support to try:

Emotional Regulation

Observed difficulty + support to try:

Impulse Control

Observed difficulty + support to try:



Cognitive Flexibility

Observed difficulty + support to try:

Self-Monitoring

Observed difficulty + support to try:



Home–School Collaboration Plan

Clarify how caregivers and school staff will communicate and reinforce shared goals.

Shared Goal

What outcome are home and school working toward together?

School Responsibilities

Supports, data, communication, accommodations, or routines.

Home Responsibilities

Routines, encouragement, communication, practice, or reinforcement.

Student Responsibilities

Age-appropriate actions the student owns.

Communication Plan

Who communicates, how often, by what method, and about what?



School Support Team Meeting Planner

Prepare for productive school meetings with clear priorities.

Top 3 Concerns

Keep the meeting focused on functional needs.

Student Strengths

Start with what is working.

Data / Examples to Bring

Attendance, assignments, behavior patterns, grades, work samples, observations.

Questions for the Team

What do we need to understand?

Requested Next Steps

Supports to discuss; final decisions remain with the appropriate school team/process.





Accommodation & Strategy Review

Review whether current supports are actually helping.

Access / Use	1	2	3	4	5
Student Benefit	1	2	3	4	5
Teacher Feasibility	1	2	3	4	5
Consistency Across Settings	1	2	3	4	5
Need for Adjustment	1	2	3	4	5

Current Supports

List accommodations, modifications, interventions, or strategies currently in place.

Evidence They Are / Aren't Working

Use concrete examples or data.

Adjustments to Discuss

What should the appropriate team consider next?





Weekly School Success Check-In

A brief collaborative review of progress, barriers, and next steps.

Student:

Week of:

Overall Week

1

2

3

4

5

Wins

What went better this week?

Hard Moments

Where did the student get stuck?

What Helped

Which supports or people made a difference?

One Goal for Next Week

Make it specific and achievable.



Program Fit & Readiness Assessment

Determine whether a site is prepared to implement an Ethos Shoreline licensed program responsibly.

Leadership Support	1	2	3	4	5
Qualified Staff	1	2	3	4	5
Training Capacity	1	2	3	4	5
Participant Fit	1	2	3	4	5
Space / Technology	1	2	3	4	5
Referral Pathways	1	2	3	4	5
Data Capacity	1	2	3	4	5
Implementation Time	1	2	3	4	5

Why This Program?

What need is the organization trying to address?

Readiness Gaps



What must be resolved before launch?

Go-Live Conditions

What needs to be true before implementation begins?



Site Implementation Plan

Turn a licensing decision into an operational launch plan.

Program & Target Population

Who will receive the program and in what setting?

Implementation Timeline

Training, marketing/recruitment, enrollment, launch, review.

Roles & Owners

Who owns coordination, facilitation, materials, data, and communication?

Operational Risks

What could disrupt implementation and how will the site respond?



Staffing & Training Plan

Ensure licensed programs are delivered by appropriately prepared personnel.

Required Roles

Program lead, facilitators, administrative support, clinical/school referral contacts, etc.

Training Requirements

Initial training, refreshers, observation, consultation, or competency checks.

Coverage / Continuity Plan

How will absences, turnover, or role changes be handled?



Brand / Materials Use Checklist

Support consistent and authorized use of Ethos Shoreline program materials.

- ☐ Use current approved program name and trademark notation where required.
- ☐ Use only current licensed manuals, worksheets, slides, and participant materials.
- ☐ Do not remove or alter copyright, trademark, attribution, or licensing notices.
- ☐ Do not represent educational programming as psychotherapy unless delivered as clinical treatment by an appropriately licensed provider.
- ☐ Do not redistribute, resell, post publicly, or share source materials beyond the license terms.
- ☐ Obtain approval for translations, substantial adaptations, co-branding, or derivative materials when required.
- ☐ Keep participant-facing descriptions consistent with the authorized program scope.
- ☐ Report suspected unauthorized copying or distribution through the designated licensing contact.

Adaptations / Questions Requiring Approval

Document any planned changes before use.



Program Fidelity Review

Check whether core program elements are being delivered consistently.

Core Content	1	2	3	4	5
Sequence / Pacing	1	2	3	4	5
Required Activities	1	2	3	4	5
Facilitator Preparation	1	2	3	4	5
Participant Materials	1	2	3	4	5
Scope / Boundaries	1	2	3	4	5
Documentation	1	2	3	4	5
Quality of Delivery	1	2	3	4	5

Adaptations Made

What changed and why?



Fidelity Concerns

What needs correction or consultation?

Corrective Action

Who will do what, and by when?



Data & Outcome Tracking Plan

Define a practical, privacy-conscious approach to program evaluation.

Outcomes to Track

What meaningful changes should the program reasonably influence?

Measures / Data Sources

Attendance, completion, satisfaction, skill ratings, pre/post measures, etc.

Collection Schedule

When and by whom will data be collected?

Privacy / Storage

How will information be minimized, protected, retained, and accessed?

Review Process

Who reviews results and how will they inform improvement?





License Renewal / Quality Review

Use before renewal or continuation decisions.

Implementation Summary

Cohorts, participants, facilitators, dates, completion, major adaptations.

Outcomes & Feedback

What did participants and staff report? What data are available?

Quality / Fidelity Findings

What is strong? What needs improvement?

Training / Support Needed

What would strengthen the next license period?

Next-Year Implementation Priorities

List the top 3.





Professional Learning Needs Assessment

Identify training priorities based on role, population, and current skill gaps.

ADHD / EF	1	2	3	4	5
Family Systems	1	2	3	4	5
Parent Coaching	1	2	3	4	5
Trauma-Informed Practice	1	2	3	4	5
Group Facilitation	1	2	3	4	5
School Collaboration	1	2	3	4	5
Grief / Loss	1	2	3	4	5
Program Implementation	1	2	3	4	5

Population / Setting

Who do I serve and where?

Highest-Priority Learning Needs



Which skills would most improve my work right now?

Desired Training Outcomes

What should I be able to do differently after training?



Training Goal Planner

Convert professional development into measurable practice goals.

Training Topic

What am I learning?

Practice Goal

What specific behavior or skill will I implement?

Evidence of Learning

How will I know the training changed my practice?

Support Needed

Supervision, consultation, observation, resources, protected time, etc.



Case Application Worksheet

Apply training concepts to a real or de-identified practice scenario.

Scenario

Briefly describe the situation without unnecessary identifying information.

Relevant Concept

Which training idea applies?

Possible Application

What would using the concept look like in practice?

Risks / Limits / Scope

What cautions or boundaries need consideration?

Next Step

What will I try, assess, or consult about?





Skill Practice & Role-Play Feedback

Give concrete, behavior-based feedback during professional skill practice.

Clarity	1	2	3	4	5
Empathy / Attunement	1	2	3	4	5
Questioning	1	2	3	4	5
Reflection	1	2	3	4	5
Structure	1	2	3	4	5
Boundary / Scope	1	2	3	4	5
Skill Accuracy	1	2	3	4	5
Confidence	1	2	3	4	5

What Worked

Name specific observable behaviors.

Try Next

Give one or two specific, actionable adjustments.



Learner Reflection

What felt natural? What felt difficult?



Post-Training Implementation Plan

Bridge the gap between a good training and actual practice change.

Three Ideas I Want to Keep

Capture the most useful learning.

One Skill I Will Implement This Week

Make it concrete.

Where I Will Use It

Client work, groups, school meetings, supervision, program delivery, etc.

Barrier I Expect

What may get in the way?

My Workaround

How will I reduce that barrier?



30-Day Practice Change Tracker

Track whether new professional skills are becoming part of routine practice.

Week	Skill Practiced	Where Used	What Happened	Next Adjustment
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Week 1

Week 2

Week 3

Week 4

30-Day Reflection

What has changed in my practice? What still needs repetition, support, or consultation?



Supervision / Consultation Agenda

Use professional support time intentionally.

Priority Questions

What do I most need to discuss?

Cases / Situations

Brief, privacy-conscious summary of cases or implementation challenges.

Ethical / Scope / Boundary Questions

What requires clarification?

Skills to Review

What would benefit from rehearsal, feedback, or observation?

Action Items

What will I do before the next meeting?





Professional Use & Customization Notes

This collection is designed as a flexible professional resource. Worksheets may be used for planning, reflection, training, implementation, supervision, school collaboration, and licensed program quality improvement. They should be adapted to the professional's credentials, scope, setting, population, organizational policies, contractual/license terms, and applicable law.

Clinical worksheets are not diagnostic instruments and do not replace comprehensive assessment, documentation requirements, risk assessment, informed consent, consultation, or independent clinical judgment. School worksheets do not create or modify IEP/504 rights or services; formal decisions should occur through the appropriate educational process.

ETHOS SHORELINE

Counseling • Family Education • Programs • Resources

