

Court Success Planning Template

Collaborative Risk Management for Justice-Involved Clients

How to Use This Template

This is a collaborative planning tool to be completed together during session. The counselor facilitates the conversation and documents responses, while the client provides input and takes ownership of the plan. Both parties receive a copy - original stays in clinical chart, copy goes to client for reference.

Client Name:

Enter client name

Date:

mm / dd / yyyy

Court Date:

mm / dd / yyyy

Probation Officer:

Enter PO name

1 Visual Collaboration

Use visual aids to map out the steps clearly for the client.

Court Requirements Identified:

List specific court requirements (attendance, testing, etc.)

Client's Understanding:

How does client describe what they need to do?

Visual Tools Used:

- ☐ Calendar/timeline created
- ☐ Process flowchart drawn
- ☐ Visual checklist provided

2 Practical Management

Focus on what the client can realistically do. Make sure it helps both them and satisfies the court.

High-Risk Situations for Legal Compliance:

What situations could jeopardize court compliance?

Realistic Prevention Strategies:

What can client actually do to manage these risks?

Client's Personal Motivations:

What does client want to protect/achieve?

Minimum Effective Changes:

Smallest changes with biggest legal impact?

3 Document Progress

Notes show the client's progress. Highlight high-risk situations and how they're being managed.

Documentation Language for Treatment Notes:

How will you describe this work in court-friendly language?

Progress Metrics to Track:

What will you measure? (days without legal complications, successful check-ins, etc.)

Communication with Court/PO:

How will you communicate progress to legal system?

4 Client Ownership

Clients should feel in control of their decisions. This helps them stay motivated and engaged in their plan.

Client's Commitment:

What specific actions is client willing to take?

Client's Concerns:

What worries client about this plan or situation?

Ownership Indicators:

- ☐ Client had choices in developing plan
- ☐ Plan uses client's own language/words
- ☐ Plan connects to client's personal goals
- ☐ Client knows they can modify plan as needed

Plan Agreement

Client Signature & Date

Counselor Signature & Date

Next Review Date: _____