



White Pine Consulting Service, Inc.

N3000 Rusch Road
Waupaca, WI 54981

(715) 258-5430

Email: whitepine@mwwb.net

Website: www.wicollaborative.org

**Training & Technical Assistance Services
Coordinated Services Team Initiative Sites**

Training and Technical Assistance (T and TA) Services for Coordinated Services Team Initiative (CST) Sites

Development Phase (Year One)

- Initial meeting(s) with grant recipient to discuss development process, possible discussion items may include but are not limited to:
 - Brief overview of CST
 - Budget, Work Plan, and evaluation discussion
 - Sustainability – both process and financial
 - Administrative responsibilities – director, supervisor and financial
 - Staffing – service coordination & project coordination – including sample job descriptions
 - Training & technical assistance overview
 - Local, regional, and statewide training and networking opportunities
- Assist in the development of the Coordinating Committee including identification of appropriate membership, and development of necessary policies and procedures, including beginning to plan for sustainability. Regularly attend Coordinating Committee meetings in person or by phone conference
- Provide on-site, telephone and email support of new Project Coordinator
- Provide two day Service Coordination and team membership training. Agenda items include but are not limited to:
 - Overview of the CST process including principles, identification of appropriate referral, team development, and building relationships with families
 - A hands-on, interactive “walk” through the team process from beginning to end (referral, enrollment, assessment, planning & crisis response planning, planning for transitions)
 - Team process, including emphasis on meeting facilitation skills as well as conflict management
 - Overview of the Coordinating Committee
- Provide one day follow-up Service Coordination and team membership training
- Provide follow-up training on supervision and coaching
- Promote the development of advocacy services and peer support including connection with Wisconsin Family Ties
- Provide information and encourage participation with all related training opportunities – two regional CST meetings per year, two statewide Project Directors meetings per year, range of regional and statewide conferences.
- Promote connection with neighboring counties and tribes
- Promote mentoring opportunities
- Provide specialized training on-site or regionally based on need

Implementation Phase (Approximately years two through five)

T& TA based on strengths and needs of each site.

- Provide two day Service Coordination and team membership training (as needed)
- Support the CST team process; may include attendance at family team meetings
- Support evaluation processes
- Ongoing support for project coordinator (phone, email, in-person)
- Topic-specific trainings for various target groups could including but is not limited to:
 - Service coordinators – overview training; team facilitation; engagement with families; crisis response planning; developing assessment and plan of care; conflict resolution
 - Addressing questions such as – When do we do “this”? What if the parent is “unwilling” to participate?
 - Coordinating committees – overview of the CST process & role of the committee; expansion and/or revitalization of the committee; sustainability
 - Families – parents as team facilitators/service coordinators; parent partners/advocacy
 - Community representatives – overview training
 - Administrative/supervisory/coaching training
- Support for Coordinating Committee expansion – may include regular attendance at Coordinating Committee meetings

Sustainability Phase (Approximately year six and after)

T& TA based on strengths and needs of each site.

- Continue supporting sites’ sustainability plan. Specific areas of focus may include:
 - Process sustainability
 - Strengthening roles of partner agencies
 - Service coordination expansion
 - Financial sustainability options
 - Promote mentoring & networking opportunities

Coordinated Services Team (CST) Initiative Specialized Training

Following are examples of specialized CST-related training and workshop topics. Other topics and opportunities are also available based on sites' needs.

For more information, please contact:

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Or visit our website: www.wicollaborative.org

An Overview of the Coordinated Services Team Process

Designed for community organizations, conferences, and developing Coordinating Committees. Specific content and areas of emphasis are tailored to the audience.

In general, this workshop provides an overview of the CST process including guiding principles, benefits of the team process, and team development. The roles and responsibilities of the Coordinating Committee may also be reviewed, including discussions of membership development and the Interagency Agreement. The training also offers a walk-through of the different stages of the team process including responsibilities of the service coordinator, assessment, plan of care development, crisis response planning, and transition.

Coordinating Committee Development and/or Rejuvenation

This workshop highlights the roles and responsibilities of Coordinating Committees including membership development, development of policies and procedures, oversight responsibilities, evaluation, and sustainability. A brief overview of the CST team process including guiding principles, benefits of the team process, and team development may also be included. Emphasis is placed on systems change, the benefits of collaboration for all partners, and sustainability of the collaborative system of care.

Service Coordination & the Team Process

Also referred to as "Service Coordination 101"; this is a hands-on, detailed 2-day training for service coordinators, parents, and team members who wish to learn the fundamentals of service coordination, team facilitation, and team membership responsibilities.

Through hands-on activities, group work, and discussion, participants will be guided through the team process from referral to transition including: building relationships with families, development of the family team, service coordination & team facilitation, strength-based assessment, development of the Plan of Care - including Crisis Response Plans, and conflict management. Plans for future support, training, and technical assistance are also discussed.

Child & Adolescent Needs & Strengths (CANS) Reliable Rater Certification

This comprehensive training begins by familiarizing participants with the CANS assessment tool, and progresses to a discussion of the details of rating specific CANS items. By the end of the training, participants will have the opportunity to become a “Certified Reliable CANS Rater”, after which they can begin utilizing the CANS with children and families.

Advanced Team Facilitation Skill Building

This workshop promotes skill building necessary for effective team facilitation. It is meant for people serving in service coordination roles who have completed the 2 day Service Coordination and Team Process training, and have provided service coordination/team facilitation for at least 6 months. Through team meeting simulations, participants will rotate through the service coordinator and team member roles, and practice skills that promote effective team meetings.

Possible topics to be covered include: addressing the needs of multiple family members, keeping teams “on track”, maintaining a strength-based perspective, conflict management, sharing responsibilities, and maintaining team member energy and interest.

Developing Creative Plans of Care

This workshop focuses on the development of creative, collaborative, plans of care. Through hands-on activities, participants will be guided through the details of developing comprehensive plans of care from the initial stages of the identification of needs, to the collaborative development of detailed options to address needs, to monitoring the plan. Emphasis will be placed on the importance of meaningful outcomes for families and providers.

Crisis Response Planning

This interactive workshop focuses on the development of crisis response plans for children and/or adults, and promotes skills necessary for utilizing a team approach to develop crisis response plans. Through hands-on activities, participants will be guided through the details of developing crisis response plans from the initial stages of brainstorming, to the development of detailed options for intervention, to plan distribution.

Conflict Resolution

This workshop promotes conflict resolution skills using real life examples presented by participants. Participants will have the opportunity to practice facilitation skills and team activities that minimize the probability that conflict will arise (e.g. the development of Team Rules), as well as strengthen skills and utilize tools that can help a team work through conflicts when they arise throughout the team process.

Strengthening Family Involvement

This workshop emphasizes meaningful family/consumer involvement at all levels of the collaborative system of care. Topics may include strengthening consumer involvement on the coordinating committee; working with families in the collaborative team environment; peer support, and advocacy.

Collaborative Team Practice in Juvenile Justice

This workshop focuses on the process of building collaborative systems of care that specifically meet the needs of youth involved in the juvenile justice system. Key elements include utilizing the balanced approach in a team environment; promotion of team development across systems; strength-based planning; and the involvement of family and community support.

Leadership for Effective Systems Change

This workshop emphasizes the importance of effective leadership in the development of system change. Based on lessons learned, discussion will focus on issues including organizational structure, roles, functions of leadership, and cross-system collaboration. Discussion also includes examples of specific activities necessary for effective leadership in a changing system.

Sustainability of the Coordinated Services Team Initiative

Preparation for this in-service includes a completion and analysis of a pre-meeting questionnaire. Following this analysis, a detailed discussion with appropriate representatives will take place to discuss possible public and private funding and resource opportunities. Emphasis will be on Medicaid eligible services as well as partner commitments for resources.

White Pine Consulting Service, Inc. Training Cadre

White Pine Consulting Service consists of a cadre of consultants from across the State to address the training and technical assistance needs of Coordinated Services Team (CST) sites on an individual, regional, and statewide basis. Each consultant has extensive experience working with CST sites in Wisconsin. Several consultants also have experience working with collaborative systems of care on a national level. Below is a summary of the primary group of consultants; additional consultants with specialties in additional areas may be involved dependent on training needs and availability.

Dan Naylor, president of White Pine Consulting, is currently the Coordinated Services Team Specialist, supporting sites across Wisconsin in the development of collaborative efforts supporting children, families, and adults with multiple needs. Dan has attended and facilitated countless family team and coordinating committee meetings and served as a Project Coordinator for over 9 years. Dan has spent over 30 years in Human Services providing consultation on subjects that include the development and implementation of integrated human services, team building, conflict resolution and strategic planning. After Dan completed his military service, he directed a Vietnam Veterans' service center, a correctional halfway house, and a four-county AODA prevention and treatment agency which included a residential center for youth. Dan has provided consultation services for several other states and has been a speaker and trainer at several state and national conferences regarding collaborative services over the last several years. Dan has a Bachelors Degree in management and Masters Degree in public administration.

Lori Martin brings hands-on experience in coordinating & supporting Collaborative Systems of Care. After receiving her BA in psychology from Ripon College, she worked as a youth trainer and counselor at a residential treatment center for children and adolescents. She began with Waushara County's Integrated Services Project in 1998 as a service coordinator and meeting facilitator for family wraparound teams, and became the project's director in 2002. Lori facilitates trainings related to service coordination, team building, and meeting facilitation. She also helps support several counties in their development of the Coordinated Services Team initiative, offering support and training to service coordinators, project coordinators, and coordinating committees. Lori is the primary developer of the CST website, www.wicollaborative.org, and provides technical assistance to sites throughout the state.

Jodee Grailer-Liedtke is a licensed clinical social worker with a Masters Degree in Social Work from UW Madison. She has been a practitioner, supervisor and administrator in child welfare and mental health agencies for over thirty years. Jodee has experience supervising and administrating child and family teams and in the development of individualized services in systems of care. She has worked with the development of collaborative services in several states including Wisconsin, Arizona, and New York State. Jodee provides training, coaching and consultation to practitioners, supervisors, and administrators in the concepts of family involvement, collaborative practice and individualized services.

Howard Harrington has worked in child welfare social work for 26 years in Iowa, Ohio, and Wisconsin. He has experience in a variety of settings, including a group home, residential treatment, public child welfare, inpatient evaluation, and school social work. He was the Deputy Director of the Waushara County Department of Human Services from 2000 to 2003. He currently works part-time for the Waupaca County Department of Human Services as technical and quality assurance advisor to their Coordinated Services Team program. Special areas of practice interest for Howard are wraparound services, rural social work, sexual abuse intervention, and staff supervision and development. Howard has trained for Wisconsin's training partnerships for the past 2 years. His MSW is from the University of Iowa.

John Franz is an attorney and consultant. After law school he joined a public interest law firm where he helped write a children's code for Wisconsin and participated in civil rights litigation. He then worked as an assistant district attorney prosecuting child welfare and delinquency cases. He then joined Wisconsin's protection and advocacy agency, representing youth with mental and developmental disabilities in special education and institutional reform matters. Next he opened a private law practice in which he primarily acted as a guardian ad litem for children and adults with handicaps. He also served as an administrative hearing officer for permanency planning reviews and provided training around the state on the children's code, juvenile offender detention and dispositions, permanency planning, foster care, adoption, and special education. When Wisconsin began to develop a system of care initiative he helped write the founding legislation, providing training and support materials, and helping communities write and implement grants related to providing integrated services for children and families. This work has led to an increased concentration on strategies for organizational change and leadership. He continues to provide consultation services throughout the United States and Canada.

Hugh Davis is the Executive Director of Wisconsin Family Ties (WFT). As a parent of children with special needs, Hugh has had the experience of navigating "the system" and is familiar with the challenges associated with working with multiple service providers. Hugh and his staff have been presenters at several CST/ISP trainings across the State in the areas of parent & advocate role on teams, advocacy support & development, and information on children's mental health. Hugh is also the co-chair of the Children Come First Advisory Committee, the group statutorily responsible for supporting the ISP & CST projects across the State.

Mary Kennedy has worked in human services in Wisconsin for over 30 years. She has Masters Degrees in Political Science and Public Administration. Prior to becoming Deputy Director and later Director of Calumet County Department of Human Services, Mary worked with several human service agencies as an independent consultant and planner. She is currently a semi-retired consultant, working with several Coordinated Services Team sites in their development of Sustainability Plans.

Dorothy Moffat is a consultant specializing in healthcare and human services. During the past 2 decades she has been successful at grant writing and project management of local, state and federal grants. Dorothy has spoken and trained extensively on a variety of topics that impact rural areas. Dorothy has been instrumental in procurement and development of Community Outreach grant funded projects. For many years Dorothy was the director of Lakeland Council on AODA and Koeller Behavioral Health Services. She has a B.S. in Community Mental Health and is a certified AODA Counselor.

Tom Schleitwiler has dedicated his career to the Human Services field. He recently retired from 32 years of service with Jefferson County Human Services Department, 22 years of which he served as Human Services Director. During his time at Jefferson County, Tom focused on optimizing agency structure and teamwork, integrating services, building evidence based programs, and community-wide collaborative systems. Over the past several years this agency and community teamwork has resulted in the implementation of Family Care and the Aging and Disabilities Resource Center, agency Divisions of Behavioral Health, and Family Resources, focusing on evidenced based practices in community supported settings, and an ever expanding Wraparound Project. Tom is most proud of his work with agency, county, and community partners in developing shared visions, programs, and collaborative projects to meet family and community needs.

Dennis Dornfeld recently retired from 23 years of service with Waupaca County Department of Health and Human Services, where he served 7 years as Deputy Director and the past 16 years as Director. During his tenure, he provided leadership in the development and sustainability of Waupaca County's Integrated Services Project, working together with partnering community agencies and organizations to develop community-based resources, reducing the need for alternative, more expensive services. Dennis currently provides consultation to county human service agencies, promoting the development and sustainability of collaborative systems of care.

Sinikka Santala retired in 2009 from her position as the Administrator of the Division of Long Term Care in Wisconsin Department of Health Services. During her 26 year career with the State of Wisconsin she worked in appointed positions under three Governors leading three different Divisions. Prior to those appointments she was the Director of the Bureau of Community Mental Health in Department of Health and Family Services. She has also worked for the University of Vermont as the director of a national technical assistance center that assisted states, counties and provinces in the US and Canada to develop community based services, regular housing and improved consumer choices for people with severe mental illness. Sinikka was deeply involved in leading the development of the CST Core Values, identifying funding for the CST grants and overseeing the implementation of the first CST sites. She provided leadership to collaborative efforts with Wisconsin Tribes, Division of Children and Families, Department of Workforce Development and Department of Corrections in developing policies and programs that result in better outcomes for families that are involved in multiple service systems.

Jon Matthew, a Ph.D. clinical psychologist, is Director of Northland Community Services; a private agency that provides a variety of clinical and in-home services to children and adults with developmental disabilities and mental health issues. His involvement with CST began 12 years ago when his agency applied for and received funding as an Integrated Services Project. In late 2002, they began receiving funding for the CST. Jon supervises several CST service coordinators. He promotes, when possible, providing targeted case management (billable to Medicaid) to children in Integrated Services, and provides consultation in this area.