Coordinated Services Team Initiative
Relationship-Building Through Assessment
Practice Overview

Summer 2018 Regional Meetings

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White Pine Consulting

Objectives

- Provide a foundational approach to assessment leading to planning.
- Utilize our strength-based practice and appreciative inquiry to engage and understand families.
- Realize the parallel between personal and professional development in the assessment process.
- Gain resources to further your practice and personal growth.
- Gain confidence through understanding and skill-building.

Agenda

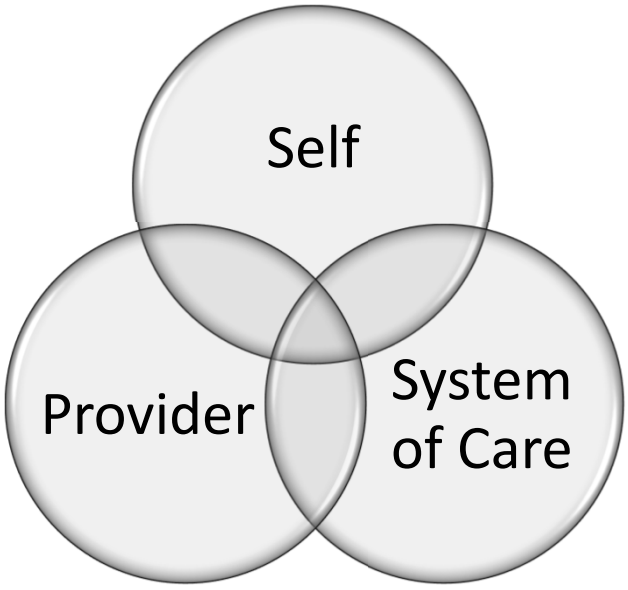
- Introductions
- Logic Model
- Issues Basket
- Content Areas
  - Assessing Strengths and Needs
  - Objective and Subjective Processes
  - Crafting an Assessment Narrative
  - Resources

Introduction

- Logic Model
  - **Inputs**- What constitutes an assessment is not always clear. Additionally, the process of conducting an assessment is easily misunderstood, so we overlook opportunities to effectively gather information, build trust and forge healing relationships.
  - **Activities**- Training to understand and align structural requirements (content) and appreciative inquiry (process) while team-building and supporting families. Participants develop multi-dimensional awareness of the components of assessment through presentation and team-based problem-solving activities. Emphasis to be placed on (a) identifying needs and (b) crafting a summary formulation.
  - **Outputs**- Facilitators understand the core logic of psychosocial team-based assessments, from requirements to relationship building opportunities. Increased confidence in performing person and family-centered assessments.
  - **Outcomes**- Families feel understood. Service teams organize around shared understanding and purpose, Employee engagement enhanced, Systems of care grow meaningfully.
- Knowledge and skill check
- Issues Basket
- Setting context

"The arc of involvement of any service encounter starts with the point of view the provider carries into the relationship, then moves to the process though which the provider get to know the family…"

- John Franz



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Holding Space

- Using guides and objective tools
- Employing appreciative inquiry
- Stabilizing
- Formulating
- Growing beyond the nest

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Building the Foundation

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In the Beginning…

- What is Assessment?
- A product or process?
- How are they used?
- When is it done?

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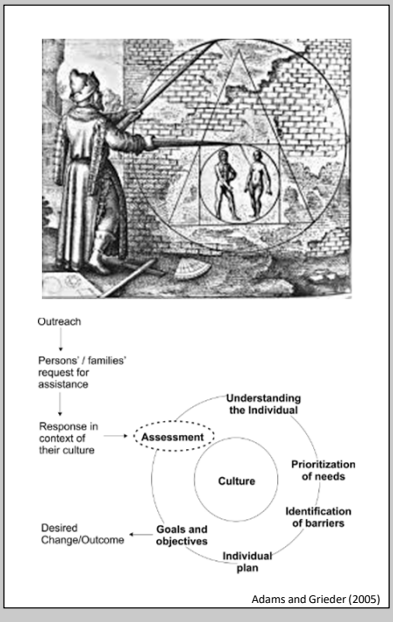
The Process of Discovery

- Assessing underlying needs and "mining for strengths"
- Realizing desired outcomes
- Continually evaluating progress

Adapted from Emily McGonigle and Ryan Ross (2018)



Adams and Grieder (2005)

Cycle of Assessment

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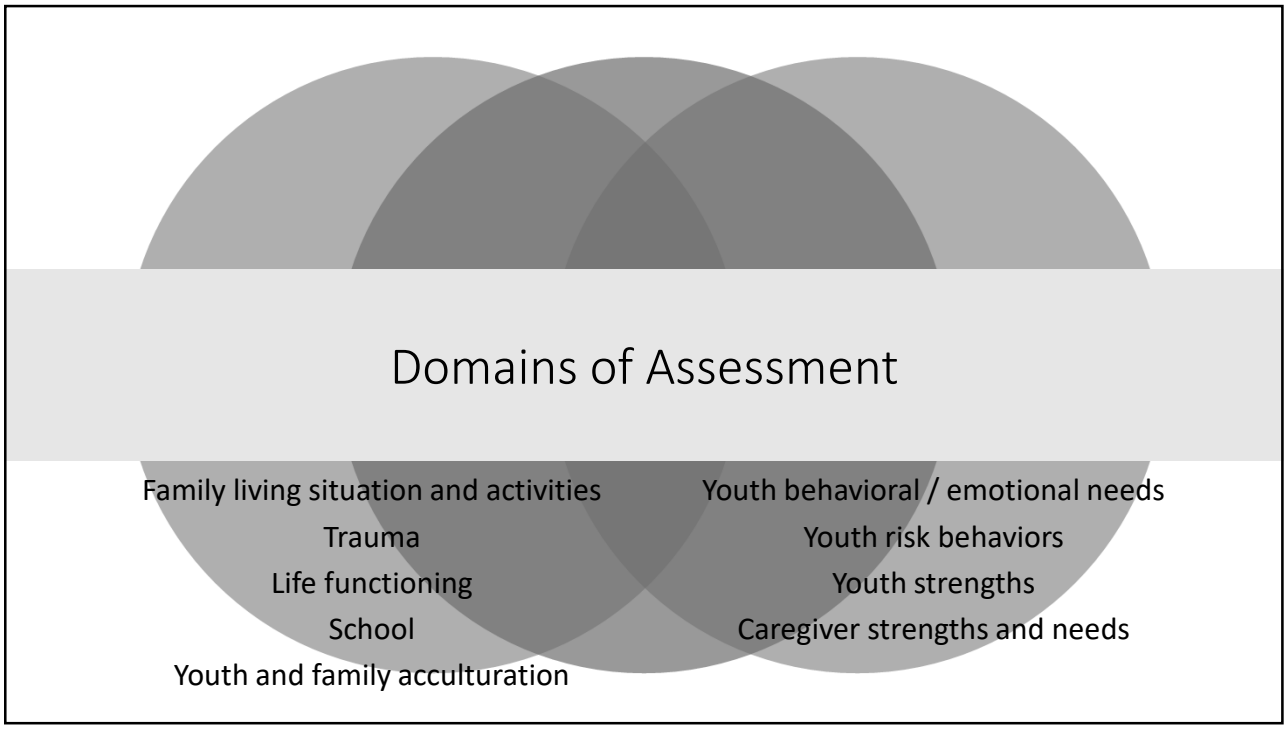

Appreciative Inquiry

- Ap-pre'ci-ate,v. 1. valuing; the act of recognizing the best in people or the world around us; affirming past and present strengths, successes, and potentials; to perceive those things that give life (health, vitality, excellence) to living systems 2. to increase in value, e.g. the economy has appreciated in value. Synonyms: VALUING, PRIZING, ESTEEMING, and HONORING.
- In-quire' (kwir), v., 1. the act of exploration and discovery. 2. To ask questions; to be open to seeing new potentials and possibilities. Synonyms: DISCOVERY, SEARCH, and SYSTEMATIC EXPLORATION, STUDY.
- https://youtu.be/QzW22wwh1J4?t=18

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Constructionist Principle	Words create worlds	Reality, as we know it, is a subjective vs. objective state and is socially created through language and conversations.
Simultaneity Principle	Inquiry creates change	The moment we ask a question, we begin to create a change. "The questions we ask are fateful."
Poetic Principle	We can choose what we study	Teams and organizations, like open books, are endless sources of study and learning. What we choose to study makes a difference. It describes – even creates – the world as we know it.
Anticipatory Principle	Images inspire action	Human systems move in the direction of their images of the future. The more positive and hopeful the image of the future, the more positive the present-day action.
Positive Principle	Positive questions lead to positive change	Momentum for [small or] large-scale change requires large amounts of positive affect and social bonding. This momentum is best generated through positive questions that amplify the positive core

– From Cooperrider, D.L., & Whitney, D. A Positive Revolution in Change: Appreciative Inquiry. Taos, NM: Corporation for Positive Change, 1999.

The CANS is not a form to be completed, but the reflection of a story that needs to be heard.

John Lyons, PhD

Assessment and Planning – Care Coordinator Tasks

- Prioritize needs with family and supports
- Assure alignment of services to needs
- Complete and ongoing update of assessment
- Complete and ongoing update of service plan
- Get everyone to do something (including youth)
- Help others use their skills creatively
- Maintain and model strengths based approach
- Support and advocate for consumer Voice Action Ownership
- Coordinate the development of a crisis /stabilization plan
- Track results

How?

- Moving from “What” to “Why” and then “How”
- Our tools
- Building a Concordance

What is a Need?

A need is a condition requiring something necessary for an individual's wellbeing, functioning or sustaining support.

- Dr. Marty Beyer

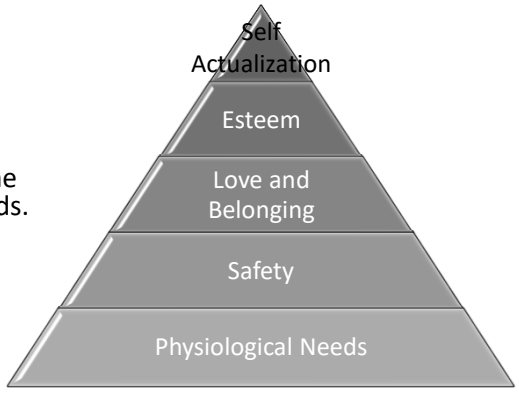
A need is about underlying causes or conditions rather than the expressions of behavior.

- Patricia Miles

Adapted from Emily McGonigle and Ryan Ross (2018)

Needs

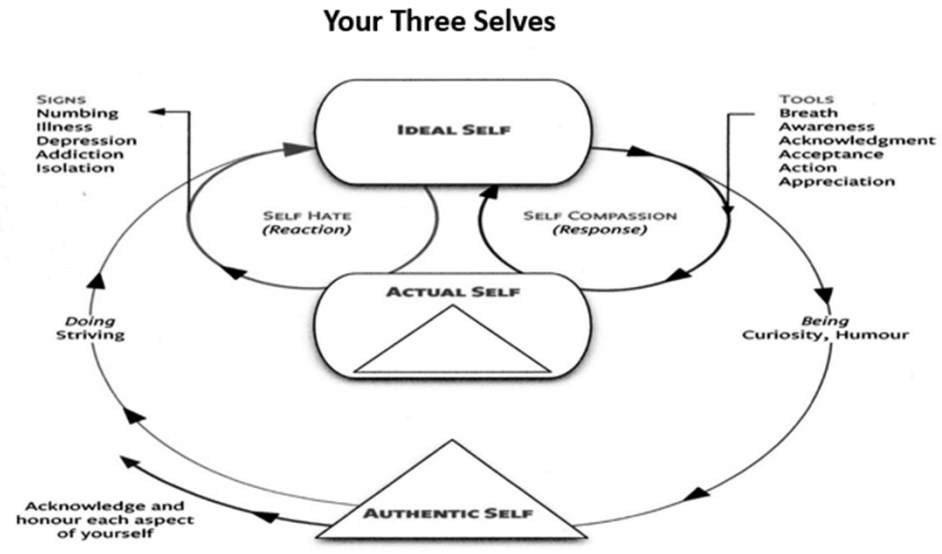
- Found by listening to the youth and family's story, and
- By asking what the youth and family need help with, or what they are struggling with
- Not a specific service
- Are family/youth-specific
- Needs might by layered. One role of the team is to uncover the underlying needs.



Discovering Underlying Needs

Adapted from Emily McGonigle and Ryan Ross (2018)

The Selves Model



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J. Cloud

Differentiating Services- Goals- Needs

- Good need statements address the "why" of the situation not the "what" of it. Reaching beyond the symptom or behavior.
- Needs are insights that address the person, character, or developmental challenge.
- Wraparound is a process that helps people think through the possibilities behind the need. When needs are met, behavior change follows.

Pat Miles

Discerning Needs

For Staff

- What is the behavior that is causing the most emotional reaction?
- Do you know enough about the family's story to answer the "why" question?
- Have you looked at unmet needs from each family member's perspective?
- Have you communicated with the family and other team members about what a need is or isn't in Wraparound?

Pat Miles

Discerning Needs

For Family Members

- Have you shared enough of your story so that team members can make an educated and reliable guess about unmet needs?
- Have you worked to get beyond the here and now of what you want to have happen to get to underlying needs?
- Are you willing to reach agreement with others about the underlying need?
- Are you prepared to work with a team about the broadest range of needs statements possible and then choose from that broad list?

Pat Miles

Discerning Needs

For Team Members

- Have you sorted the difference between your goals and need statements?
- Are you prepared to be open to whatever the unmet needs may be?
- Do you know enough about the facts of the behavior to do “needs” work?
- Are you prepared to assign a positive rather than negative intentionality to events as they come up?

Pat Miles

Bringing Needs Together

- Describe the facts as you know them.
- Verbally assume positive intent & normalize the unmet need.
- Acknowledge their concern.
- Invite alternatives.
- Negotiate best scenarios

Pat Miles

Strengths

- Identified by getting to know the youth and family, their supports and their community
- Natural supports and providers also bring strengths to the table
- Can be found in qualities, skills, and interests – both personal and professional
- When strengths are identified, ask for concrete examples of that strength in action

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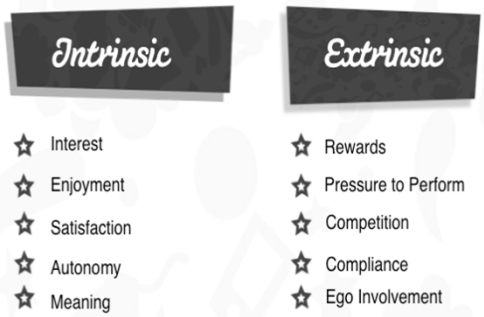
Role of Strengths?

- Open conversations with positive energy
- Something we are good at and enjoy
- A character trait or asset
- Can empower us
- Can be a special skill or gift (strengths) or something that enables our growth and destiny (Sparks)
- Have functional value
- Building blocks of good service planning

Adapted from Emily McGonigle and Ryan Ross (2018)

Living Your Sparks: Optimum, Flow, or Peak Experiences

1. You can do it or learn it easily.
2. You feel strong when you do it.
3. It comes naturally to you.
4. It brings joy to you and others.
5. You look forward to doing it.
6. You feel like you're "in the zone" when you do it.
7. Time seems to fly when you're doing it.
8. After you've expressed or used it you feel fulfilled.
9. After you've expressed or used it you look forward to doing it again.



J. Cloud (Ian Paul Marshall, adapted)

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Strengths Continuum

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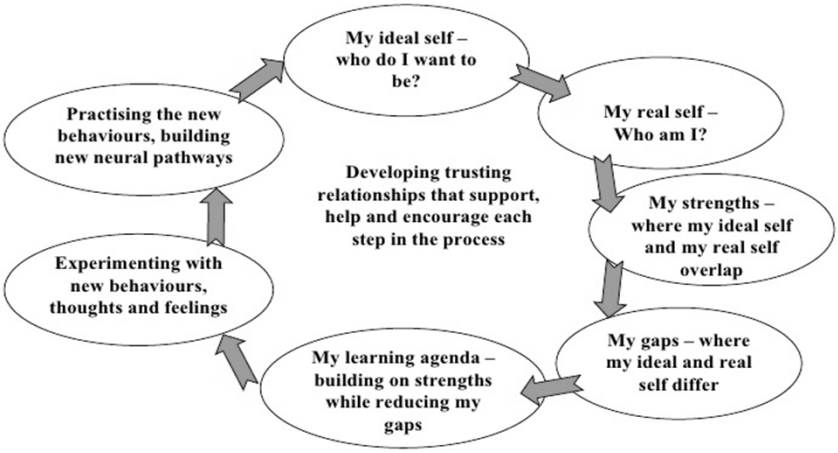
Boyatzis Model of Intentional Change



J. Cloud

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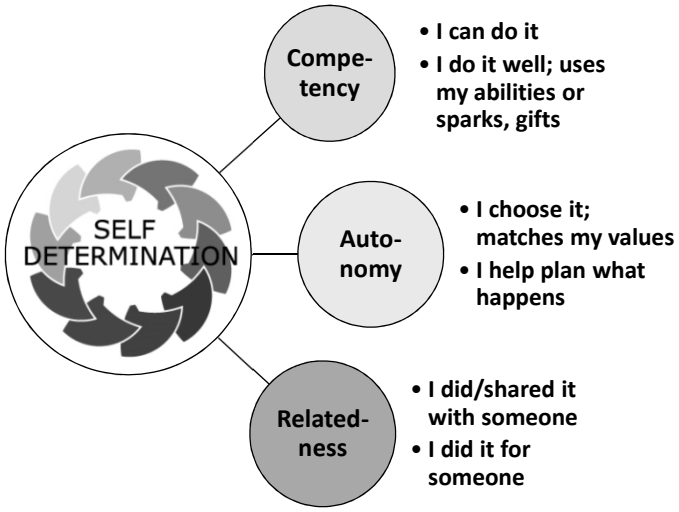
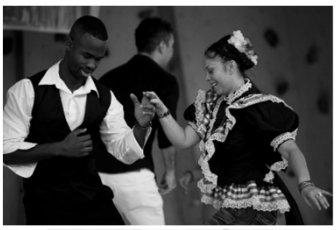
What Makes Experiences Meaningful in the Workplace and in Life as a Whole?





J. Cloud

(Source: Sheldon and Elliot, Journal of Personality and Social Psychology, 1999, Vol. 67, No. 3)

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Assessment Toolbox

- Objective Tools
  - CANS (Child and Adolescent Needs Assessment)
  - ACE (Adverse Childhood Experiences)
  - BASIS (Behavioral and Symptom Identification Scale)
  - Psychological testing
  - IEP (Individual Educational Plan)
  - BDI (Beck Depression Screen)
  - ASI (Addiction Severity Index)
  - Others…

Adapted from Emily McGonigle and Ryan Ross (2018)

Assessment Toolbox

- Subjective Tools
  - Face to Face Interviews
  - Motivational Interviewing
  - Appreciative Inquiry
  - Intuition
  - Dreams
  - Reflective Supervision
  - Others…

Adapted from Emily McGonigle and Ryan Ross (2018)

The Child and Adolescent Needs and Strengths (CANS)

At the Team Level

- It's comprehensive
- Helps communicate the family's story
- Reflects current and relevant information
- Helps create a shared vision or common goal
- The identification of needs and strengths leads to planning decisions
- Tracks progress over time

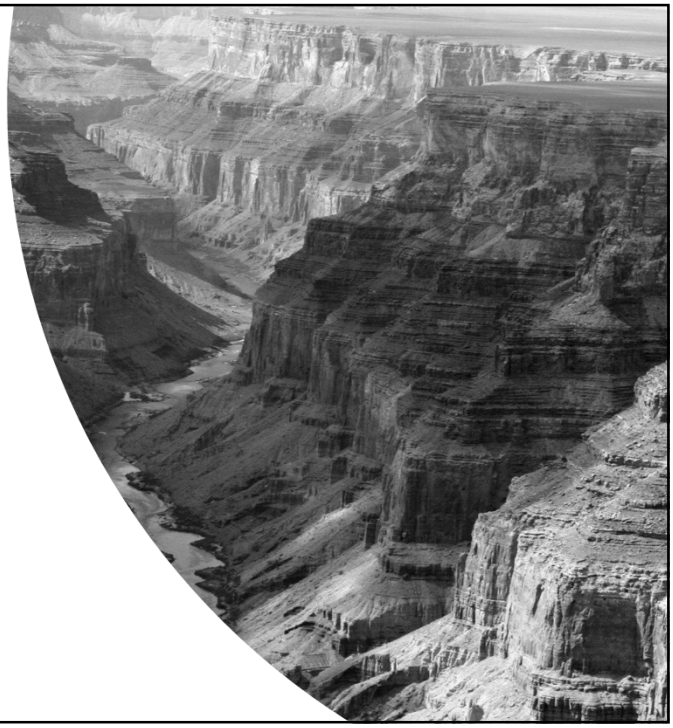
County, Tribal, and State Levels

- Are the lives of youth and families improving?
- Compare outcomes with other youth and families being served in the public mental health system

Assessment Narrative (Preparing for a Journey)

What we need to know:

- Where we are going
- Why
- What we hope to find
- What to bring
- Which route to take
- Modes of travel



Attentional Literacy

"You can't depend on your eyes when your imagination is out of focus…"

-Mark Twain

Our Gifts of Observation

- Insight
- Ascriptive power
- Interpretive power
- Predictive patterns

Four kinds of First Steps

- Containment
- Consumer's sight
- Considering an opposing step
- Double description

Adapted from Gustafson (2005)

Assessment Narrative

- **Presenting** issues and difficulties
- **Predisposing** factors to individual's current difficulties
- **Precipitating** factors to individual's current difficulties
- **Perpetuating** factors to individual's current difficulties
- **Protective** factors of individual's life
- **Integration and recommendation** for wraparound services

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The End

(of the beginning)

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Resources

- Adams and Grieder (2005) Treatment Planning for Person-Centered Care; the Roadmap to Mental Health and Addiction Recovery Elsevier Academic Press
- Cloud and Robinson (2018) Coordinated Services Team Initiative Strengths-Driven Practice Overview
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