

Coordinated Services Team Initiative Northeastern Region

Meeting Facilitation Workshop
Fox Valley Technical College
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Engagement Phase Tasks

- Meet and begin building a relationship with the caregiver and service/support providers
- Explain the collaborative team process
- Address safety and immediate needs
- Gather perspectives on strengths and needs
- Begin Initial Assessment Summary of Strengths and Needs
- Begin to identify an emerging sense of mission
- Identify, invite and orient team members
- Arrange initial meeting

Genuineness

Empathy

Respect

Individual and Family Culture

- Culture is defined as “the unique values, ideas, customs, skills, arts, of a family or a people that are transferred, communicated and passed along”
- “Culture” refers to the unique way an individual or family operates and functions, including habits, characteristics, preferences, roles, values, traditions etc.
- Sometimes we have difficulty identifying individual and family culture or reflecting it in Plans of Care. Culture is much more than ethnicity, language or food preferences. Without a quality and thorough discovery of family culture, and without reflecting that culture in the work of the team, plans are less likely to be successful.



Before the First Team Meeting Building Trust with Parents and Youth

- Listen with true concern without judging
- Two-way conversation – get to know each other
- Be honest
- Don't pretend to understand if you don't
- Treat parents as equals – acknowledge they know their child best
- Step “into their world” – work with families where they're at
- If you don't know the answer, say you don't
- Clear Expectations

Adapted from interviews between Wisconsin Family Ties advocate, Tina Swinford and parents involved in CST; June 2004

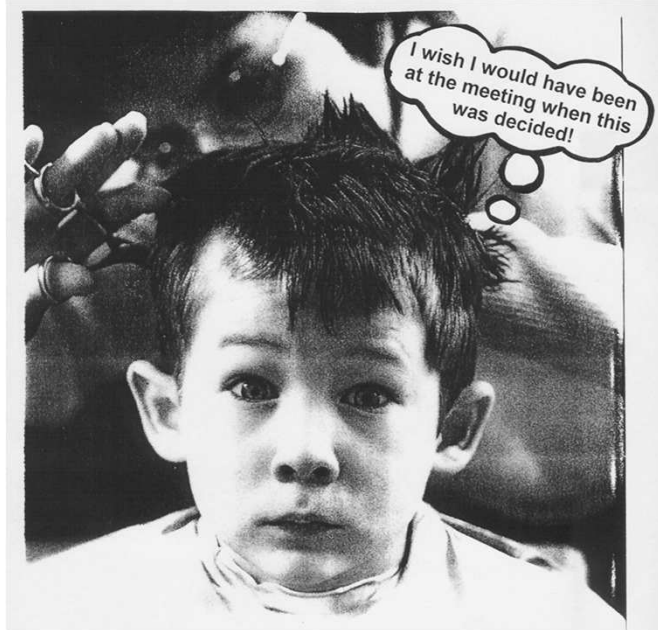
Before the First Team Meeting: Family and Youth Engagement

- Orientation to the process
- Hear family's story and gather relevant information
- Complete a draft of the initial assessment with the family
- Discuss potential team members

Best Practices for Increasing Meaningful Youth Participation in Collaborative Team Planning

- Organizational Support for Participation
 - Organizational culture values youth participation
 - Youth are present when decisions are made
 - Assist the youth in preparing for the meeting
 - Help youth determine who a support person might be
- Create a Safe and Respectful Meeting Environment
- Ensure the Youth is Part of the Team
 - What the youth says matters and has an impact on decisions
 - The youth's strengths, talents, and achievements are a focus
 - Everyone including the youth understands decisions that are made and next steps.
- Gather Meeting Feedback from the Youth

Source: Best Practices for Increasing Meaningful Youth Participation in Collaborative Team Planning; Research and Training Center, Portland State University, May 8th, 2008



Team Member Selection – Family and Youth Voice and Choice

- The family and youth should be provided with support for making informed decisions about whom they invite to join the team, as well as support for dealing with any conflicts or negative emotions that may arise from working with such team members.
- The family and youth should be supported to explore options such as inviting a different representative from an agency or organization.

Source: National Wraparound Initiative – The Principles of Wraparound; Chapter 2.1; Oct 1 2004

Identifying Natural and Community Supports

- Who are the people who have been supportive and helpful over the years?
- When an incident or crisis happened, who was the first person you called?
- Who do you trust? Who does your child trust?
- Do you have neighbors, friends, or family members who are aware of your situation and can help you?
- Are there any activities in the community for your child and for you?
- Are you involved in any spiritual or religious activities?

Recruiting Natural Supports Answering the question, “What will my role be?”

- Suggestions from Parents
 - Help the parent and youth stay positive
 - Help keep the meeting culturally appropriate
 - Help parents translate issues into their own language or experiences.
- Suggestions from Service Providers
 - Assert observations and positive historic events
 - Help keep parent and team on track at meetings
 - Move beyond frustration and skepticism; trust that the support of the team can help improve the situation.
 - Think of positive situations the family has dealt with and add to that
 - Help identify strengths

Adapted from: Lessons from the Field: What Helps in Utilizing Family Strengths in Wraparound; Rick Phillips, Ph.D.

Engaging Natural and Community Supports on Teams

- Eliminate barriers
 - Childcare
 - Transportation
 - Time & location of meeting
- Help ensure an active role
 - Encourage active participation
 - Explain the reciprocal supportive role of the team
- Provide orientation and ongoing support
- Long distance involvement

Involving Peer Support Specialists

- A parent or caregiver of a child with emotional or behavioral disorders
- Specifically trained for an information, support, and advocacy role
- Genuinely understands and appreciates the culture of a family living with a child with special needs, because it is also their culture
- Typically employed by an organization other than service-providing agencies

Source: Employing Parent Peer Specialists to Improve Outcomes, Hugh Davis, Wisconsin Family Ties

The Role of a Care Coordinator

Role of a Service Coordinator:

- “Expert” on the collaborative team process
- Assure team completes the assessment and plan of care
- Ensure the plan of care is monitored
- Ensure reassessment and plan of care updates
- Share outcomes
- Promote and support the priorities identified by the family and youth

The Role of a Service Coordinator should not be:

- The sole decision-maker
- Person who does all the work
- The only person team members call
- To dictate what should be done, to infringe on, or be a substitute for the policies and procedures of other agencies

Care Coordination: Abilities for Effective Team Facilitation

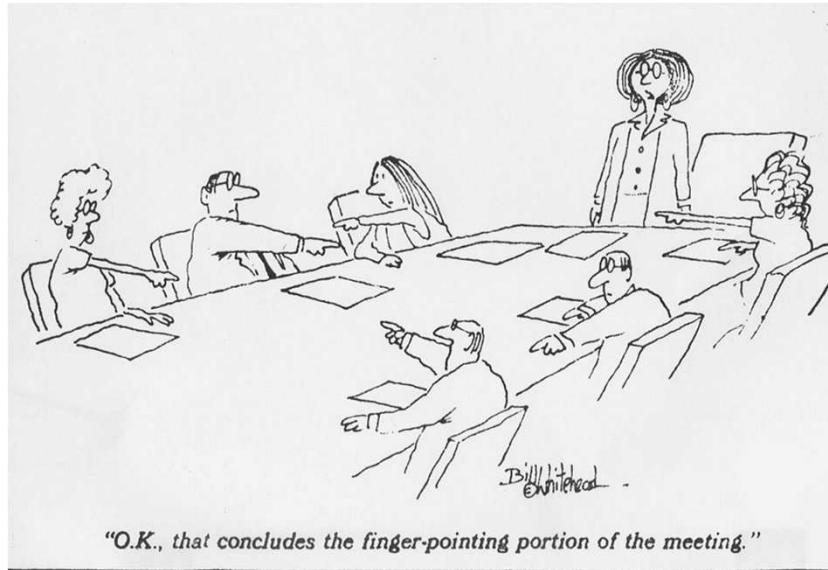
- Ability to accurately listen
- Ability to communicate clearly
- Ability to develop trust of team members
- Ability to understand multiple perspectives
- Ability to intervene on ineffective behavior
- Ability to accept feedback without reacting defensively
- Ability to provide support and encouragement
- Ability to maintain and demonstrate patience

Team Facilitation: Important Details #1

- Ensure all team members are aware of meeting time and location – address possible barriers to attendance
- Hold meetings when & where it is best for most
- Conduct regularly scheduled meetings
- Establish meeting time and end as planned
- Establish and follow an agenda
- Ensure that someone is responsible for taking and distributing meeting minutes
- Follow-through on commitments

Team Facilitation: Important Details #2

- Clarify the meeting objectives
- Establish team guidelines
- Define and build consensus
- Utilize parking lot – if necessary
- Track and prioritize conversations
- Deal with person who complains (whines)
- Deal with person who dominates



Team Facilitation: Promoting Participation

- Clarify team members' roles, strengths, and goals
- Establish team guidelines
- Assure active and sincere participation by all team member
- Identify "hidden agendas" and get them on the table
- Recognize and reward creativity, flexibility, and volunteerism by team members
- Evaluate team member satisfaction with the process at the end of meetings

Facilitating The Meeting Process: Closing the Meeting

- Summarize Decisions
- Review action items and discuss “homework”
- Schedule next meeting(s)
- Evaluate the meeting
- Thank team members

Source: The Team Handbook, Second Edition; Scholtes, Peter; Joiner, Brian; and Streibel, Barbara. 1996, Joiner Associates, Inc.

Reaching Consensus on Priority Needs and Strengths

| Background Needs | Anticipated Outcome Needs | Plan Target Needs |
|--|--|--|
| <ul style="list-style-type: none"> • Items that aren't directly addressable • Items the family decides to “park” | <ul style="list-style-type: none"> • Focus of planning / intervention | <ul style="list-style-type: none"> • Needs that may be affected as a result of effectively addressing the “anticipated outcome needs” |

| Useful Strengths | Strengths to Build |
|--|--|
| Strengths rated 0 - Centerpiece, or 1 - Useful | Strengths rated 2 - Identified but needs building 3 - Unidentified |

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Treatment Planning with a Communitric
Tool, John Lyons, Ph.D.

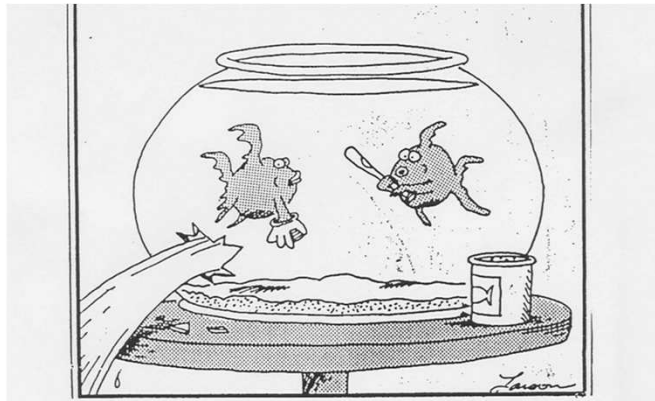
Developing Creative and Effective Plans of Care

- ✓ Reach consensus on plan target needs
- ✓ Determine a long-term goal
- ✓ Determine objectives (SMART objectives)
- ✓ Determine tasks / activities – who does what, by when, how it will be paid for
- ✓ Review and evaluate

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Crisis Prevention Planning

- Distinguish between Crisis/Safety issues and “Plan of Care” issues
- Some crises will be prevented as a result of collaborative planning based on identified needs and strengths
- Accurate information regarding early warning signs of a crisis can allow for timely and appropriate response
- For staff, less time is spent managing crises and more time on activities that promote meaningful long-term outcomes for families.



**“Did we address this situation
in our Crisis Plan?”**

Brainstorm Strategies

- Consider strategies or interventions that have worked in the past
 - Experiences of family, youth, and team members
 - What are some things that help you calm down when you start to get upset?
- Consider strengths of the family, youth, team, and community
- Don't stop at “contact law enforcement”, or “call 911”. Develop options through these interventions with agency representatives

Source: The Emerging Science of Trauma Informed Care – Kevin Ann Huckshorn, 2004

Principles for Conflict Management

- Encourage equal participation: we are in this together
- Actively listen: you are important and valued
- Separate fact from opinion: challenge categorical statements
- Separate people from the problem: use the board
- Focus on the big picture: reaffirm goals, principles, values
- Build consensus

Adapted from Conflict Management, Hendricks, 1989

Key Stages in Collaborative Conflict Management

1. Introduction - establish ground rules, build trust
2. Clearly frame the conflict - story telling
3. Brainstorming - generate alternative solutions, separate fact from opinion
4. Agreement - Record the resolution and steps necessary to achieve it
5. Future steps - schedule follow-up, possible impact if not resolved, need for third party

Team Meeting Analysis Sample Documents

- Family team meeting review
- Youth evaluation
- Parent/Caregiver evaluation

When is a Team “Done”?

- Outcome indicators demonstrate that goals are being met or in the process of being met
- Informal/natural supports are involved in ongoing support to the family and youth
- Family and youth have access, voice and ownership
- A plan for transition has been completed

Voice

Access

Ownership

Examples of High Quality Implementation

- Involve youth and family members in the development of the family team
- Actively engage and integrate the family's natural supports
- Develop statement of team mission or family priority needs
- Brainstorming individualized strategies to meet needs
- Involve youth in community activities
- Link caregivers to social supports
- Develop proactive crisis response plans based on functional assessments
- Ensure team members follow through on tasks
- Develop effective transition plans

Activity: Work on Team Facilitation Challenges

- Managing challenges such as one person dominating a conversation, and conversations that are off-topic / not on the agenda.
- How to keep meetings strength-based while also addressing challenges without allowing the meeting to become too negative or blaming of the family.
- Balancing the family's right to privacy with the open communication of the team, especially when sensitive topics come up unexpectedly.
- How to ensure the values of wraparound (a voluntary program) are incorporated into the team process when there is involvement with programs that are not voluntary for families.