CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

# PASSPORT TO PLAN OF CARE FACILITATION

** 1-3 SHOULD BE COMPLETED BY THE SAME SUP/LEAD

**ALL 4 MUST BE SIGNED AND DATED PRIOR TO CERTIFICATION

## 1. PREPARATION

- COMPLETED WITHIN SUPERVISION AND SIGNED
- FOR CERTIFICATION, THE COMPLETED FORM ALONG WITH AGENDA IS PROVIDED TO THE CONSULTANT.

## 2. FACILITATION

- SUP/LEAD WILL ATTEND THE MEETING.
- THE COACH CONSULTANT WILL ALSO ATTEND IF APPLICABLE.
- WITHIN 48 HOURS: THE FORM WILL BE REVIEWED WITH THE SUP/LEAD, CC, AND COACH IF APPLICABLE

## 3. FOLLOW THROUGH

- WITHIN 2 WEEKS THE MEETING: PLAN WILL BE COMPLETED AND DISTRIBUTED TO TEAM MEMBERS.
- FOR CERTIFICATION: THE PLAN OF CARE RUBRIC WILL BE UPLOADED TO FILE STORE IN SYNTHESIS.

## 4. TRAINING COMPLETION

- ATTENDANCE AT THE RUNNING EFFECTIVE TEAM MEETING TRAINING.

Last revised 12.26.17 LD

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

## Preparation

_____

**Care Coordinator** **Date**

_____

**Supervisor/Lead** **Date**

## Facilitating the meeting

**Date of Meeting** _____

_____

**Care Coordinator** **Date of Review**

_____

**Supervisor/Lead** **Date of Review**

_____

**Consultant** **Date of Review**

## Follow through

_____

**Care Coordinator**

_____

**Supervisor/Lead**

## Completion of the Running Effective Team Meetings Module

_____

**Care Coordinator Signature** **Date of Training**

Last revised 12.26.17 LD

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

# PREPARING FOR A WELL FACILITATED PLAN OF CARE MEETING

The key to facilitating a successful meeting starts with preparation. A care coordinator (CC) must begin preparing for a plan of care (POC) meeting at least two weeks ahead of time. This includes invitations/explaining the process, agenda development, and getting materials together. The following responsibilities need to be completed – at least two weeks ahead of the actual meeting. For each responsibility, there must be a correlating detailed progress note recorded in Synthesis.

| 1 | **Preparation of Team Members**<br>Preparation activities and correspondence with team members regarding the upcoming POC/team meeting must be documented within progress notes. | **Progress Note Date(s)** | **Sup/ Lead Initials** |
|---|---|---|---|
| | **CC reviews the current POC and identifies:**<br>• Information that needs to be updated and can be gathered in advance, i.e. diagnosis, school stats, medication changes, etc.<br>• New/former members on the team list and corresponding strengths.<br>• Needs statements that require additional work to be underlying needs (vs. goals, services, or strategies).<br>• Benchmarks that have been met or need to be updated/improved<br>• Strategies that are outdated and need to be changed, better defined, or inclusive of task-shifting.<br>• Transition planning requirements, i.e. school, schedule, placement, or team member changes. | | |
| | | Notes | |
| | **CC invites team members listed on the team list, identified by the family, or new providers.** *If this is a family's first Plan of Care Meeting, team members listed on the screening/assessment tool should be invited with parental permission/ROI consent.*<br>The conversation and corresponding note must include:<br>• An update related to the team member's specific strategies as written in the Plan of Care, including: progress, barriers, and completion/outcomes.<br>• Indication that the team member should come to the meeting prepared to offer suggestions or brainstorm new strategies/next steps related to their role and natural and informal supports/community resources they can partner with in task-shifting.<br>• Tasks that need to be completed in advance of the meeting in order for decisions to be made, i.e. consult Supervisor/Lead invite them to meeting, review court orders, complete assessments, , etc.<br>• If team members are unable to attend, update and next steps info is gathered, preferably in writing, to be addressed at the meeting. | | |
| | | Notes | |
| | **CC makes effort to recruit natural/informal supports:**<br>There is a progress note reflecting a conversation with the youth, family, and team members related to identifying and inviting potential informal supports, i.e. family members, community members, etc. The note should reflect indication that they shared the importance of their involvement in the Wraparound process. | | |
| | | Notes | |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

| | | | |
|---|---|---|---|
| | **CC creates the agenda:**<br>• Complete the Domain Review with the family to identify areas of focus for the meeting, i.e. needs updates, unaddressed needs, or progress toward meeting needs. Include new needs on the agenda to create BM and Strategies at the meeting.<br>• Gather agenda items from all team members to address in the meeting.<br>• State specific outcomes of the meeting, i.e. decisions to be made, plans that need to be created, needs that should be addressed/added, etc. Do not include "updates" on the agenda.<br>• Include potential guidelines, written in a positive frame, i.e. start on time, end on time, one person speaks at a time, everyone shares ideas, etc.<br>• Review with the youth and family for approval. Ask if they want to facilitate any portion of the meeting and help them prepare to do so. | | Notes |
| | **CC makes reminder calls/emails:**<br>Call all team members to remind them of the meeting date and time. The conversation, and corresponding note, must include a general update so all team members come to the meeting with full knowledge of what has occurred since the last meeting. The objective of the meeting is to plan moving forward. | | Notes |
| 2 | **Logistical preparation for the meeting**<br>(Preparation will most likely be discussed within weekly supervision or during conversations with a Lead, Agency Coach, or Supervisor.) | **Supervision Date(s)** | **Sup/ Lead Initials** |
| | Review the POC and necessary updates/changes with the CC and establish a creative facilitation plan. Do not use the POC document as your agenda or facilitation tool by itself. | | |
| | Type and distribute the agenda/POC to all team members.<br>• Discuss how it is unique to the youth and family.<br>• Does it reflect all the items needed to facilitate a successful meeting in priority order?<br>• Does it include the Family Vision? | | |
| | Decide on an ice-breaker or activity for introductions. | | |
| | Gather facilitation supplies: fidget tools, games, big paper, markers, and copies of handouts. | | |
| | Discuss the time/location of meeting, content of the meeting, facilitation skills. Consider necessary accommodations and support needs.<br>• Transitions<br>• Meals<br>• Seating arrangements<br>• Activities for younger kids<br>• Engagement<br>• Potential conflict<br>• Crisis prevention/intervention<br>• Facilitation skill development | | |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

# Facilitating the Plan of Care/Team Meeting

**Supervisor must complete this facilitator review for the observed POC meeting. The Wraparound Consultant will also complete one and meet with the Supervisor to compare notes in preparation for providing the feedback directly to the CC. In these meetings, the Supervisor will take the lead in providing the feedback to the Care Coordinator. It is also suggested that the CC complete a self-evaluation to be discussed as part of the coaching/feedback process of learning.**

| Name of team members present | Relationship |
|---|---|
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| | |

| Facilitation Skill: Engagement | | |
|---|---|---|
| **Assessment Indicator** | **Examples of demonstrated skill** *N/A-Provide Justification | **Opportunities for growth/development** |
| How did the CC welcome the team and set the tone and direction of the meeting? | | |
| How did the CC establish a clear purpose for the meeting and share identified outcomes? | | |
| How did the CC elicit ideas/feedback from every team member in a manner that moved the agenda forward? | | |
| How did the CC demonstrate flexibility in facilitation based on the family and team needs? | | |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

| Facilitation Skill: Fidelity to the Process | | |
|---|---|---|
| **Assessment Indicator** | **Examples of demonstrated skill** *N/A-Provide Justification | **Opportunities for growth/development** |
| How did the CC ensure the Vision, Needs, Benchmarks, Strategies, and Strengths were all included in a creative and meaningful way in the planning process? | | |
| How did the CC facilitate creative and community based strategy development, and ensure everyone on the team has a job to do? | | |
| What strategies did the CC use to ensure that all agreed upon strategies outline who will do what, when, where and specifically how? | | |
| How did the CC facilitate planning around task-shifting with all formal providers? | | |
| How did the CC hold team members accountable for the strategies outlined in the POC and assess progress based on benchmarks? | | |
| How did the CC facilitate plan changes based on input from the team? | | |
| What strategies did the CC use to facilitate the meeting in a creative and professional manner? | | |
| How did the CC effectively facilitate crisis planning based on the safety need(s) in the POC? | | |
| **Facilitation Skill: Conflict Management** | | |
| **Assessment Indicator** | **Examples of demonstrated skill** *N/A-Provide Justification | **Opportunities for growth/development** |
| What strategies did the CC use to uphold the team guidelines? | | |
| How did the CC use re-framing to manage disagreements or maintain strength-based planning? | | |
| What strategies did the CC use to facilitate conflict resolution during the meeting? | | |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

## Follow through skills

**To ensure that the plan created in the meeting is adequately documented, the Supervisor must complete the Plan of Care Rubric Tool and review it in supervision prior to approval of the Plan of Care. Rubric Tool should be updated in file store in Synthesis.**

**It is within this final step that the Care Coordinator will connect with team members who were not in attendance, document and distribute the plan within 2 weeks, and monitor the strategies developed. It is also within this step that the Care Coordinator will begin to prepare the agenda items for the next meeting.**

| **Post meeting follow-up/within two weeks** | | **Progress Note Date** | **Sup/Lead Initials** |
|---|---|---|---|
| 1. | Check in with team members that were not present to ensure that their strategies are included and updated within the Plan of Care. They need to be notified of the dates and times of upcoming meetings. | | |
| 2. | The Plan of Care needs to be documented within POC Policy and Procedure timeframes.<br>**For certification, the POC needs to be at supervisor level 5 days following the meeting. | **Notes:** | |
| 3. | The Plan of Care Rubric Tool is completed and reviewed within supervision.<br>**For certification purposes, the Rubric Tool is required to be filled out by both the Care Coordinator and the Supervisor/Lead. Both can be uploaded into file store in Synthesis | | |
| **POC monitoring to be discussed during weekly supervision** | | **Notes:** | |
| 4. | Distribute the Wraparound approved Plan of Care within 14 days of the meeting date. | | |
| 5. | Monitor strategy progress and barriers weekly. | | |
| 6. | Preparation for the next Team Meeting to include: sharing information and updates among team members, create a running agenda, holding team members accountable for their strategies, assessment of benchmark completion, and identification of new needs. | | |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

**Tools that can be used in the review process……**

| Facilitator Review Observation Guide: things to look for in a meeting |
|---|
| Care Coordinator arrives 15 minutes prior to meeting beginning. |
| Facilitator begins the meeting with introductions and welcomes all Team members |
| Facilitator identifies purpose and timeframe of meeting, and establishes guidelines when needed. |
| Facilitator reviews strengths discovery and/or acknowledges progress since the last meeting |
| Facilitator has and uses a visual aid to keep engagement throughout the meeting |
| Facilitator has avoided using jargon and uses family friendly language by addressing team members as Mr. or Mrs.; unless otherwise instructed |
| Facilitator engages the child/youth throughout the whole meeting |
| Facilitator ensures that a family vision has been identified and /or confirmed |
| Facilitator assists the Child and Family Team to identify and prioritize underlying needs and assists the Child Family Team to adjust needs and plan based on progress |
| Facilitator engages all team members in robust brainstorming and ensures talk is well distributed throughout all members |
| Facilitator helps the Child and Family Team identify and/or evaluate progress of benchmarks that are clear, measurable, realistic, and focused on the Child and Family Team's strengths |
| Facilitator checks in with each Team member to report out on their contribution to progress towards achieving benchmarks |
| Facilitator reviews domain review and ensures any high or medium concerns are discussed and that there is an action plan to address these domains |
| Facilitator is able to re-direct team members to remain strength-based and non-blaming when discussing challenging times/topics (perspective shift) in a professional manner |
| When restrictive strategies are discussed, Facilitator helps the team to look at community options and alternatives to address the concern within the home/community setting |
| Facilitator is an active listener as is evidenced by reflections/summaries and frequent check-ins with the family |
| Facilitator engages informal supports in decision-making and ensures they have a clear role on the team or is working to identify these supports |
| Facilitator ensures that youth and family are well informed and have the strongest voice in the decision-making process |
| Facilitator summarizes at the end of the meeting and team members leave with an understanding of their roles and responsibilities |
| Next team/POC meeting is scheduled with the family and informal supports availability prioritized and a time and location chosen by them |
| Facilitator effectively manages conflict that may arise and navigates the discussion to resolution. If no resolve, there is facilitation of compromise. |
| Facilitator reviews and updates crisis plan during the meeting. |

CC Name_____ New Hire: YES ☐ NO ☐

Agency_____ Team Mtg ☐ POC Mtg ☐

## Plan of Care Meeting: Agenda Template

**Items below need to be included on the agenda that is created for a plan of care/team meeting. The hope is that in the development of this agenda, the individuality of the young person and their family shines through. This also does not include specific items that team members may contribute. Many of those additional team member items may already be related to one of the items below.**

Introductions/Strengths team members bring:

Set Next Meeting Date:

Team Guidelines:

Review/Re-state Family Vision:

Review/Identify Needs:

Review/Modify benchmarks:

Needs Ratings:

Review/ Modify Strategies:

Review/Modify Crisis Plan:

Signature Sheet: