

WRAPAROUND COACHING MANUAL

Wraparound Florida Training
& Coaching Video Companion

Module 10:
Coaching

Prepared For:



FLORIDA DEPARTMENT
OF CHILDREN AND FAMILIES
MYFLFAMILIES.COM

This manual has been developed to accompany the Wraparound Florida Training and Coaching video series. The material in this manual will provide coaching support to assist case managers and coaches in achieving certification in the Wraparound process. The purpose of the manual is to provide material to support the coaching process. There is instructional information for coaches in the manual as well as written material that may be shared with case managers to assist them in learning the process. Throughout the manual the terms "case manager" and "Wraparound facilitator" are used interchangeably. The following resources are mentioned throughout the manual and may be found in the locations listed below:

- Wraparound Florida Training and Coaching video series- videos are located on the Collectively website at www.collectivelyus.org under the Wraparound tab.
- Wraparound Coaching Tools are located at the back of the Coaching Manual #10. The same Coaching Tools are also located on the Southeast Florida Behavioral Health Network website in the Wraparound Toolkit: www.sefbhn.org (scroll to the bottom right and click on Wraparound, then go to the Champion Toolkit to access the Coaching Tools).
- Throughout the Coaching Manuals there are several references to forms. This material is also available on the www.sefbhn.org website under the Organizational Toolkit in the forms tab.

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CONCLUSION COACHING

The first step in implementing Wraparound is selecting the right person for the case management role. Wraparound is a unique process that requires a different way of thinking. In order to be successful, a case manager must be willing to make changes to current practice and be flexible. When hiring new case managers, the coach is integral to the process. The coach should be involved in the interview process and asking Wraparound-related questions to ensure the right person is hired to implement the process.

When providing coaching, the Wraparound coach should first watch the Wraparound coaching video to gain insight into the coaching process. This manual also has some of the information from the video for reference. The purpose of coaching is to assist the case manager in providing high fidelity Wraparound to individuals and families served. Ideally, coaching should start when they are first hiring new case managers and on-boarding (training) those case managers. There is no need to wait for newly hired case managers to attend Wraparound 101 training before coaching is started. This provides new case managers with an overview of the process and prepares them for future learning. Although on-boarding is essential, the primary learning experience will be hands on. Working directly with families and utilizing the process is the most effective way to build a skill.

Coaching is essential for any case manager to master a skill. Training and coaching should also emulate Wraparound values and guiding principles. An example of this is when the coach-case manager relationship is strengths-based and collaborative. The coach must be

readily accessible to the case manager for coaching, guidance, and support. Additionally, a coach must base their guidance on fidelity to the model yet allow individualization to meet the case manager's specific learning style. Coaching should be encouraging and supportive, offering the case manager a safe place to practice their skills. Wraparound coaching offers a combination of reflective and in-depth questions to ensure understanding.

Components of effective coaching include telling, showing, practicing and offering feedback. Some noteworthy coaching techniques include assessing prior knowledge, modeling, including cooperative learning, incorporating visual aids and checking for understanding. So now let's review and fully describe some of the functions of a coach. Coaches are responsible for the training, coaching and technical assistance that results in successful Wraparound. Coaching encompasses much more than just reviewing coaching tools and Wraparound documents. There are many responsibilities of a coach including:

- Staff selection.
- Training and coaching new staff through the certification process (including modeling, behavioral rehearsals, coaching, documentation review, field observation).
- Provide on-going coaching and support even after certification to prevent drifting back to business as usual (including modeling, behavioral rehearsals, coaching, regular individual and group coaching, documentation review, field observation).
- Regular supervision directly related to the Wraparound process.
- Outreach activities related to Wraparound (such as collaboration with system partners).
- Collect and submit required monthly Wraparound metrics.

- Monitor fidelity to the Wraparound model utilizing the Wraparound Coaching Tools.
- Attend meetings directed towards Wraparound professional development, such as Wraparound Learning Communities.

There are several requirements to ensure that a case manager is implementing high fidelity Wraparound. The first case management responsibility is to actively engage the individual and family and then work with the family to engage other team members. The case manager must work hard to manage the team process to ensure that the team is meeting the needs of the family and working the wraparound plan. And lastly, the facilitator is responsible for ensuring that before transitioning a family out of formal Wraparound, they have taught the family to manage their own process. By providing case managers with coaching support, we help them learn the skills necessary to support sustainable success of individuals and families.

MODULE 10

APPENDIX A



STATEWIDE WRAPAROUND TRAINING AND CERTIFICATION

FLORIDA MODEL

Wraparound uses a coaching model to ensure that each case manager and supervisor is trained to provide Wraparound to high fidelity. Case managers and supervisors must go through the coaching and certification process prior to becoming both certified Wraparound case managers and certified Wraparound coaches. The first step is to attend the Wraparound 101 training; however, the coach does not have to wait until a training is available to start coaching. This can be a part of the initial training and onboarding process at organizations. Wraparound uses standardized coaching tools. There are nine core skills, each with a corresponding coaching tool. Case Managers will need to pass each core skill with proficiency to become certified in the Wraparound process. The coach provides the case manager with a copy of these coaching tools and reviews the coaching tools with the case manager so they will have a good idea of expected activities in the Wraparound process. The coach demonstrates activities through written, verbal and visual demonstration. This supports the learning process as individuals learn differently. The coach models the process through their coaching and coaching and training does not end at certification. The coach provides ongoing coaching, training and support to staff to ensure drift does not occur after certification.

Training

There are various training opportunities designed for communities implementing System of Care and organizations implementing Wraparound. Below is a breakdown of the training events with a brief description and a delineation of who should attend each training.

Champions Training. This step is designed to create sustainability across the state. Each community that is implementing Wraparound will identify a local champion or multiple champions.

- Who should attend this training event?
- Identified system leader that will move the Wraparound process forward in their own community.
- System of Care Coordinator.

Training on the Wraparound Process (Wraparound 101). This step starts with a three-day core Wraparound skills training. This training is a combination of National Wraparound Initiative materials, Vroom VDB materials, Collectively materials, Southeast Florida Behavioral Health Network materials and statewide Medicaid requirements. This step involves direct workshop training to the emerging workforce covering the following learning objectives:

- Understand differences between traditional service planning and Wraparound planning.
- Understand the roles and differences of the Wraparound case manager and Family Support Provider (FSP).
- Learn how to apply Wraparound values and principles to actual practice.
- Practice engagement skills.

- Identify family needs, and with the family develop long range vision and short-term goals.
- Acquire skills to conduct an interview for the exploration of a family's life and learn ways to maximize natural support membership on the child and family team.
- Learn elements of strengths, needs, and culture discovery and how to engage the family in this process.
- Learn a method for the critical review of Strength, Needs and Culture Discovery (SNCD).
- Learn steps of crisis planning and demonstrate implementation in development of initial crisis plan.
- Identify potential areas of crisis that need stabilization.
- Learn crisis planning steps and demonstrate crisis planning skills.
- Strengthen observational skills and identify effective facilitator interventions.
- Gain an understanding of the case management role and be able to critique Wraparound plans using the Coaching tools.
- Learn and practice child and family team formation skills.
- Identify factors that lead to successful collaboration and develop action plans for improving collaboration with system partner(s).
- Learn basic facilitation skills, practice redirection skills with challenging team.
 - Who should attend this training event?
- Case managers
- Case management Supervisors
- Family Support Partners

Coaches/Supervisory Training. This training is designed for supervisors involved with the implementation of Wraparound within their organization. The training is also available to community coaches that will be supporting Wraparound implementation. A Wraparound Coach is somebody that has experience implementing Wraparound and will provide support and technical assistance to new staff learning the process. This training is focused on the following learning objectives:

- Learn about national and state trends in systems of care and team process implementation.
- Review the basic definitions and core principles of system of care and the Wraparound process and compare current regional direct practice to state and national best practices.
- Identify existing best practices with supervision.
- Learn about key aspects of good supervision.
- Learn about strengths-based culturally competent supervision models.
- Practice strengths-based supervision models.
- Learn techniques of improving supervision and coaching staff to the non-negotiables of the Wraparound process.
- Learn use of supervisor implemented quality assurance and continuous quality improvement tools within the organization.
- Learn how to manage the Wraparound coaching tools to help staff move to basic and advanced competency levels, and to full certification.
 - Who should attend this training event?
- Supervisors
- Case managers in a lead or supervisory role

- Community leaders with Wraparound experience

Ongoing Coaching and Technical Assistance

Fidelity Effort and Developing Local Coaching. When seeking to create a sustainable Wraparound community, technical assistance is generally provided primarily to supervisors as coaches. Direct coaching will be provided to the staff as well as the supervisor to ensure implementation of high fidelity to the Wraparound model.

Coaching is initially provided by certified coaching staff in partnership with the direct supervisor(s) of the Wraparound case manager(s). It is difficult to estimate coaching hours as the number of hours is correlated to the skill level of the case manager hired. On an average it takes approximately ten to fifteen hours of coaching to help a case manager become certified in the process. Coaching and supervision using the Coaching Tools often occurs at multiple levels using the following concurrent processes:

- **Group Coaching.** Every step of the Wraparound process and corresponding skills are reviewed. Case managers share their experiences with clients and discuss the application of the Coaching Tools. Group coaching includes role-play and mock team planning.
- **One-on-One Coaching.** During one-on-one coaching, the case manager is assessed utilizing the Coaching Tools. Supervisors are crucial to this skill assessment process as they know the case manager's strengths and needs based on their working relationship and previous opportunities for observation of the case manager in action.
- **In-Vivo Coaching.** This coaching method involves direct observation of case managers working with the identified client. The coach and/or supervisor will

observe the case managers practice and evaluate skill acquisition utilizing the tools. As above, skill, strengths, and needs are identified by observation during practice.

Certification Capacity for the Wraparound Process

Individuals may pursue three paths toward certification. The **case manager path** is for case managers and case management supervisors and is the initial step in becoming a coach or a 101 trainer. A next step may be the **coach (Supervisor) path** for individuals who would like to be able to certify other staff and supervise case managers. Finally, a third path is to become **a trainer** of Wraparound.

Case Manager Certification. Individuals seeking certification as a Wraparound case manager must participate in Wraparound 101 training and receive coaching towards certification using the Coaching Tools. Coaching may include; shadowing of experienced case managers, behavior rehearsals, observation, and certification activities. Individuals must demonstrate skill acquisition by scoring **at least 80%** on each page of the Coaching Tools. This certification is typically achieved in the first six months.

Below is a list of the skills that are required for case manager certification. A thorough description of each of these skills is included in Attachment 1 (on page 16).

- Wraparound 101 Training (three days, 18 hours)
- Engagement-- First Meeting with a Family
- Engagement – Family Preparation for First Team Meeting
- Engagement-- Strengths, Needs, and Culture Discovery (SNCD)
- Engagement– Functional Assessment/Crisis Planning
- Planning– Initial Wraparound Child and Family Team (CFT) Meeting

- Planning– Wraparound Plan
- Implementation– Follow-up Team Meeting
- Implementation – Progress Notes
- Transition– Transition Plan

Case Management Supervisor/Coach Certification. In addition to the above, individuals seeking to become Certified Case Managers/Coaches must complete the following training and certification activities:

- Coach Training
- Coach Certification
 - Coaching Activities
 - Certification of Staff
 - Participation in Wraparound Learning Community

A thorough description of each of these skills is included in **Attachment 2** (on page 20).

Trainer/Fidelity Manager. In addition to the above requirements for Certified Case Managers and Certified Supervisor/Coach, individuals seeking to become Trainers/Fidelity Managers must also participate in activities that include shadowing, observation, and review.

Fidelity to the Wraparound Process

It is critical that staff monitor and maintain fidelity to Wraparound practice to deliver high quality services and supports. Research has shown that training is the first step to meeting fidelity in the Wraparound process. After training, coaching with the Wraparound Coaching Tools is the second step to ensure fidelity. Certification in Wraparound may only

be achieved after training and practical application of the model. In order to achieve certification, coaching must be provided by a certified Wraparound coach/supervisor. Organizations must be committed to providing case managers with on-going training, support and supervision to ensure that fidelity to the model is continuously maintained and to prevent drift from fidelity to the model. Tools such as the Organizational Wraparound Readiness Assessment Protocol (O-WRAP) are available to support case managers, supervisors and organizations.

Fidelity to Wraparound is validated by ensuring the use of the Coaching Tools for coaching and use of Wraparound tracking logs, at the provider level. The intention is to use a comprehensive approach to train and certify supervisors to become coaches within provider organizations throughout the state. The current fidelity tools used are the Coaching Tools for case managers and the tracking log for certification purposes.

ATTACHMENT I

Outline for Wraparound Certification as a Wraparound Case Manager

The Coach will be meeting with all Wraparound case managers to discuss the nine skills and then utilize the Coaching Tools to measure for proficiency. This will be implemented with actual client scenarios. Coaching through verbal explanation, written documentation and role play will be provided prior to demonstration and scoring. Additionally, feedback will be provided with a debriefing session after each activity. If the Wraparound case manager does not receive a passing score of 80% proficiency, the step will be completed again.

Steps to Certification as a Wraparound Case Manager

Wraparound 101 training (**mandatory for certification**). This is a 3-day training that is also approved by the Florida Certification Board for Medicaid Behavioral Health Case Management (Targeted Case Management). Prior to attending this training, the Wraparound case manager will be oriented to the Wraparound process. (**Within the first 3 months of hire.**)

SKILL I: FIRST MEETING WITH THE FAMILY

The first meeting will require practice through role play and discussion prior to completing the skill with an actual family. After the Wraparound case manager feels comfortable, they will schedule a meeting with the family and complete these skills on the Coaching Tools while being observed by their coach. (**Approx. 2-3 hours.**)

SKILL 2: STRENGTHS, NEEDS & CULTURE DISCOVERY (SNCD) ASSESSMENT

The Wraparound case manager will complete a SNCD with an actual family. This is a narrative and comprehensive assessment of the client and family. This must include information obtained from any known formal and natural supports as well as any collateral documentation received. This skill will be reviewed by the coach for proficiency. **(This may take multiple attempts to write the assessment correctly.)**

SKILL 3: PREPARING THE FAMILY FOR THE INITIAL CHILD AND FAMILY TEAM MEETING

Preparing the family for their first team meeting will require practice through role play and discussion prior to completing the skills with a family. The case manager will schedule a meeting with the family to complete these skills while being observed by their coach. **(Approx. 1½ to 3 hours.)**

SKILL 4: CRISIS PLAN

Crisis planning will be completed during a face-to-face session with the family and team. The crisis plan is designed to prepare the family for any future crisis. The crisis must be something the family feels is a crisis to them. The coach will review the crisis plan utilizing the Coaching Tools to ensure that it is a plan that is detailed, measurable and includes a sequential set of action steps that describes who will do what, when, and how. **(Approx. 2½ to 3 hours.)**

SKILL 5: INITIAL WRAPAROUND CHILD & FAMILY TEAM MEETING (CFT)

The Child and Family Team (CFT) meeting will start with role playing and a detailed explanation of the requirements for these skills between the Wraparound case manager and the coach. After role playing in the office the case manager will facilitate their first team meeting in the family home. The case manager will be observed by the coach during an actual CFT with the family and their team. **(Approx. 2½ to 3 hours.)**

SKILL 6: WRAPAROUND PLAN

The Wraparound case manager will finalize the Wraparound Plan utilizing the goals developed during the CFT. The Wraparound case manager will have the family review for accuracy and make any corrections as needed. The family will sign the plan. The coach will score the plan through documentation review using the Coaching Tools. **(Approx. time: How long it takes the Wraparound case manager to complete and finalize the plan.)**

SKILL 7: FOLLOW-UP TEAM MEETING (CFT)

The Wraparound case manager will hold the follow-up team meeting with the family and team to review the progress, achievements and barriers over the past 30 days. The follow-up meeting is designed to identify and plan for new needs. This will be completed through direct observation by the coach during a child and family follow-up team meeting. Follow-up meetings occur with the team every 30 days. **(Approx. 1½ to 2 hours.)**

SKILL 8: PROGRESS NOTES

After every step in the process, progress notes and other relevant documents must be completed and placed in the client's file. Wraparound language directly related to the skill must be clearly written in all documentation. Some information may be in other documents found in the client record and will count towards the skills on the Coaching Tools. **(This will take the coach 1 hour or less to review and the Wraparound case manager will make corrections for proficiency.)**

SKILL 9: TRANSITION/COMMENCEMENT

The Coach will score transition through observation and document review. The Wraparound case manager will facilitate a final meeting, complete the transition plan with the family, and hold a commencement celebration with the family. **(Approx. 3 hours.)**

Determination of Proficiency as a Certified Case Manager

All reviewed documentation, the Coaching Tools scoring sheet and the tracking log must be submitted to the identified region representative. The Wraparound case manager will obtain a certificate as a Certified Wraparound Case Manager. After becoming a certified Wraparound Case Manager, they must continue to provide the Wraparound process with their families and follow the model to fidelity. The supervisor/coach will provide on-going support, training and observation to ensure fidelity.

CEU Requirement

To ensure that on-going Wraparound education occurs, CEU's are required to be completed. Every Wraparound case manager and Wraparound Coach is required to

complete **10 CEU hours annually**. CEU's must be directly linked to one of the 10 Wraparound principles. If a Wraparound Refresher/Booster training is offered in the case manager's region, certified individuals are required to complete the training every two years. Copies of all certificates must be retained by the certified individual and available upon request by the regional Wraparound Fidelity Representative.

ATTACHMENT 2

Outline for Certification as a Wraparound Supervisor Coach

The Wraparound Supervisor that is implementing Wraparound within their organization will oversee the case manager certification with support from a certified Wraparound Coach. The responsibilities of Wraparound Coaching include direct observation, documentation review, and scoring for proficiency on the Coaching Tools. The Wraparound Coach will offer support and guidance to the Wraparound Supervisor. It is the responsibility of the Wraparound Supervisor to provide training, coaching and support to their case managers in the Wraparound process and thus ensure fidelity to the model.

The Wraparound Supervisor will prepare their case managers, observe their case manager facilitating activities, review documentation, score the skills performed by the case manager, debrief with their case manager and compare the Coaching Tools with the Wraparound Coach. The Wraparound Coach and the Wraparound Supervisor will complete the scoring for the same activity to ensure inter-rater reliability. For the Wraparound Supervisor to be certified as a Wraparound Supervisor Coach, the scoring of the Coaching Tools must be a close match to the scoring completed by the Wraparound Coach. If the compared scoring is not a match or a close match, the skill set will be completed again to ensure proficiency.

Please note that the time to complete certification varies depending on how long it takes the Wraparound Supervisor to train case managers, schedule the observation, review documentation, have case managers make needed corrections and debriefing with the

Wraparound Coach. Every skill should be completed with an actual family to fully understand and implement the process.

Prior to certification as a Wraparound Supervisor Coach, the Wraparound Supervisor **must attend** the mandatory Wraparound 101 training. The Wraparound Supervisor should have already completed this mandatory training prior to becoming a Certified Wraparound Case Manager. If a Supervisor is receiving coaching to become certified as a case manager at the same time as their case manager, co-coaching can occur. This means that an external coach will simultaneously work with the supervisor and one identified case manager as they co-facilitate Wraparound with a family. Both the supervisor and the case manager will need to demonstrate proficiency to the coaching tools. Once the supervisor has mastered a new page of the coaching tools, they will then be able to begin the supervisor coaching process outlined below.

STEPS TO CERTIFICATION AS A WRAPAROUND SUPERVISOR COACH

SKILL 1: FIRST MEETING WITH THE FAMILY

The Wraparound Supervisor will prepare the case manager to complete these skills. The Wraparound Supervisor will inform the Wraparound Coach of the time and date of this activity so that the Wraparound Coach can attend. The Wraparound Coach will observe the meeting either in person, video or over the phone.

The Wraparound Supervisor will observe case managers conducting the first meeting with the family. The Wraparound Supervisor will utilize the Coaching Tools to monitor proficiency. Both the Wraparound Supervisor and the Wraparound Coach will observe the case manager and score them utilizing the Coaching Tools. After the activity, the Wraparound Supervisor and Wraparound Coach will discuss their observations and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with their case managers.

SKILL 2: STRENGTHS, NEEDS AND CULTURE DISCOVERY (SNCD) ASSESSMENT

The Wraparound Supervisor will train case managers how to complete a comprehensive Strengths, Needs and Culture Discovery (SNCD) Assessment. These skills will be scored through documentation review. The Wraparound Supervisor will provide the Wraparound Coach with a copy of the SNCD. Both the Wraparound Supervisor and the Wraparound Coach score the document utilizing the Coaching Tools. After both have

reviewed the document and scored, the Wraparound Supervisor and Wraparound Coach will discuss the activity and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with their staff.

If corrections by staff are needed, the Wraparound Supervisor will forward the Wraparound Coach a copy of the revised Strengths, Needs and Culture Discovery Assessment. The Strengths Needs and Culture Discovery Assessment will be scored again and compared for proficiency.

SKILL 3: PREPARING THE FAMILY FOR THE INITIAL CFT MEETING

The Wraparound Supervisor will prepare case manager to complete this skill. The Wraparound Supervisor will inform the Wraparound Coach regarding the time and date of this activity so the Wraparound Coach may attend. The Wraparound Coach will attend the meeting either in person, video or phone.

The Wraparound Supervisor will observe case managers completing the preparation for the Initial Child and Family Team Meeting. The Wraparound Supervisor will utilize the Coaching Tools to monitor proficiency. Both the Wraparound Supervisor and the Wraparound Coach will observe and score the case manager utilizing the Coaching Tools. After the activity, the Wraparound Supervisor and Wraparound Coach will discuss what was observed and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with the case manager.

SKILL 4: CRISIS PLAN

The Wraparound Supervisor will train case managers to complete a Crisis Plan. These skills will be scored through documentation review. The Wraparound Supervisor will provide the Wraparound Coach with a copy of this document. Both the Wraparound Supervisor and the Wraparound Coach score the document utilizing the Coaching Tools. After both have reviewed the document and scored, the Wraparound Supervisor and Wraparound Coach will discuss the activity and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with the case manager.

If corrections are needed, the Wraparound Supervisor will forward the Wraparound Coach a copy of the revised Crisis Plan. The Crisis Plan will be scored again and compared for proficiency.

SKILL 5: INITIAL WRAPAROUND CHILD AND FAMILY TEAM MEETING (CFT)

The Wraparound Supervisor will prepare the case manager to complete this skill. The Wraparound Supervisor will inform the Wraparound Coach regarding the time and date of this activity so that the Wraparound Coach may attend. The Wraparound Coach will attend the meeting either in person, video or phone.

The Wraparound Supervisor will observe the case manager facilitating the initial Child and Family Team Meeting. The Wraparound Supervisor will utilize the Coaching Tools to monitor proficiency. Both the Wraparound Supervisor and the Wraparound Coach will observe the case manager and score utilizing the Coaching Tools. After the activity, the Wraparound Supervisor and Wraparound Coach will discuss what was observed and

compare scoring. The Wraparound Supervisor is responsible for debriefing the results with the case manager.

SKILL 6: WRAPAROUND PLAN

The Wraparound Supervisor will train case managers to complete a Wraparound Plan. These skills will be scored through documentation review. The Wraparound Supervisor will provide the Wraparound Coach with a copy of this document. Both the Wraparound Supervisor and the Wraparound Coach score the document utilizing the Coaching Tools. After both have reviewed the document and scored, the Wraparound Supervisor and coach will discuss the activity and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with case managers.

If corrections by the case manager are needed, the Wraparound Supervisor will forward the Wraparound Coach a copy of the revised Wraparound Plan. The Wraparound Plan will again be scored and compared for proficiency.

SKILL 7: FOLLOW-UP TEAM MEETING (CFT)

The Wraparound Supervisor will prepare case managers to complete this skill. The Wraparound Supervisor will inform the Wraparound Coach regarding the time and date of this activity so that the Wraparound Coach can attend. The Wraparound Coach will attend the meeting either in person, video or phone.

The Wraparound Supervisor will observe case managers facilitating a follow-up Child and Family Team Meeting. The Wraparound Supervisor will utilize the Coaching Tools to monitor proficiency. Both the Wraparound Supervisor and the Wraparound Coach will

observe the case manager and score the staff utilizing the Coaching Tools. After the activity, the Wraparound Supervisor and Wraparound Coach will discuss what was observed and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with their case managers.

SKILL 8: PROGRESS NOTES

The Wraparound Supervisor will train staff to write Progress Notes that utilize the Coaching Tools and provide an understanding of how the Progress Notes directly relate to the Wraparound process. After every step in the process, a Progress Note and other relevant documents will be completed and placed in the client's file. The Wraparound Supervisor will review the Progress Notes and other relevant documents to ensure that the steps in the Coaching Tools have been completed. The Wraparound Supervisor will ensure that Wraparound language is included in each document and that it relates back to the activity performed.

The Wraparound Supervisor will provide the Wraparound Coach with a copy of the Progress Notes and any other relevant documentation. Both the Wraparound Supervisor and the Wraparound Coach will score the Progress Notes and other relevant documents utilizing the Coaching Tools. After both have reviewed the documents and scored, the Wraparound Supervisor and Wraparound Coach will discuss the documents and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with their case managers.

If corrections by staff are needed, the Wraparound Supervisor will forward the Wraparound Coach a copy of the revised documents. The documents will be scored again and compared for proficiency.

SKILL 9: TRANSITION/COMMENCEMENT

The Wraparound Supervisor will train case managers to complete a comprehensive Transition Plan. These skills will be scored through documentation review. The Transition Plan must be a clear document covering all the steps in the Coaching Tools. All supporting documentation must be submitted with the Transition Plan for review. The Wraparound Supervisor will provide the Wraparound Coach with a copy of this document and any supporting documentation. Both the Wraparound Supervisor and the Wraparound Coach will score the documents utilizing the Coaching Tools. After both have reviewed the documents and scored, the Wraparound Supervisor and coach will discuss the activity and compare scoring. The Wraparound Supervisor is responsible for debriefing the results with their case manager.

If corrections by the case manager are needed, the Wraparound Supervisor will forward the Wraparound Coach a copy of the revised documents. The documents will again be scored and compared for proficiency.

All certification information will be entered on the Certification Tracking log included in this section.

Determination of Proficiency as a Certified Wraparound Supervisor Coach

Once the Wraparound Supervisor has completed the Coaching Tools with the Wraparound Coach, all documentation **must be submitted** to the identified regional Wraparound representative for review. A determination will then be made whether the Wraparound Supervisor will obtain a certificate as a Certified Wraparound Coach. Subsequent to becoming a Certified Wraparound Coach, the individual must continue to provide ongoing training, support and oversight to ensure the model is continuously being followed to fidelity.

WRAPAROUND CERTIFICATION TRACKING LOG:

Provider Name: _____

Month: _____

Organization Staff	Wrap 101	Engagement				Planning		Implementation		Transition	Total (87)
		First meeting w/ family (10)	SNCD (10)	Prep for first CFT (8)	Crisis/ FA (8)	Initial CFT (12)	Wraparound Plan doc (7)	CFT meeting (10)	Progress Notes (13)	Plan (9)	

Certification- Please report only a combination of High Proficiency and/or Medium Proficiency on this log. The minimum # of highs and mediums needed to be met are indicated on each page of coaching tools. If a Low Proficiency score is earned the skill should be repeated for practice. When reporting a score please also include the date of coaching below the score in the box. The goal for certification is approximately 80% proficiency overall.

APPENDIX B

COACHING TOOLS

(begin on next page)

WRAPAROUND

Coaching Tools - Instructions

The Wraparound Coach will prepare the individual/family to complete each page of the coaching tool. Methods of observation and determination of scores as well as directions for scoring each skill are outlined below.

SCORE	DETERMINING SCORE	POINTS CALCULATED
High	Step was fully covered	You will count this as 1 point
Moderate	Step was addressed but more detail was needed	You will count this as half a point (.5)
Low	Step was not addressed or not addressed correctly	You will count this as zero. If any step scored a zero, the individual/family will need to have more coaching and repeat the step for rescoring before passing the skill set.
N/A	If this does not apply to your agency	You will not count this item and you will subtract it from the total possible points for the skill set

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL SET	METHOD OF DETERMINATION OF SCORE	HIGHEST POSSIBLE SCORE	MINIMUM SCORE NEEDED TO PASS	MAXIMUM NUMBER OF MODERATE SCORES
1. Initial meeting with the individual/family	In-person observation, video, or listening in over the phone.	10	8	2
2. SNCD	Review the SNCD.	10	8	2
3. Crisis Plan	Review the Crisis Plan.	8	6.5	3
4. Preparing the individual/family for the initial CFT	In-person observation, video, or listening in over the phone.	8	6.5	3
5. Initial CFT	In-person observation.	12	10	2
6. Wraparound Plan	Review the Wraparound Plan.	7	5.5	3
7. Follow-up CFT	In-person observation.	10	8	2
8. Progress Notes	Review documentation. Some information may be located on documents other than progress notes and may be used for review.	13	10.5	3
9. Transition	Review the Transition Plan.	9	7.5	3

WRAPAROUND Coaching Tools - First Meeting with the Individual/Family

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. The Case Manager introduces themselves and engages the individual/family in conversation, actively listening to the individual/family's concerns and hopes for Wraparound.		
2. The Case Manager describes Wraparound in a way that addresses individual/family concerns tailored to their learning style and prepares them for purposeful transition.		
3. The Case Manager describes their role and limitations of their role.		
4. The Case Manager explains confidentiality and has the individual/family sign a release of information if necessary.		
5. The Case Manager discusses their obligation to ensure safety and mandatory reporting.		
6. The Case Manager discusses immediate crisis needs and helps individual/family identify any that need to be addressed now.		
7. The Case Manager asked the individual/family about what has been tried in the past, including how natural supports were involved, and how well it worked.		
8. The Case Manager helped the individual/family to brainstorm ways of stabilizing the identified crisis, focusing on individual/family strengths and natural supports.		
9. The Case Manager helped the individual/family choose option(s) & develop a plan for prevention, early intervention, & intervening if the crisis happens.		
10. The Case Manager reviewed the meeting with the individual/family to get their satisfaction and suggestions for improvement in the process.		
TOTAL SCORE:		To pass the skill set, a total score of 8 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: First meeting with the individual/family is strength-based and provides the individual/family with hope for a better life.		

This form can be scored either through field based observation or through telephone monitoring.



WRAPAROUND Coaching Tools - Strengths, Needs, and Culture Discovery

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. Core individuals/family were involved in the SNCD process and their voices can be heard.		
2. The SNCD identified areas of strength and need across life domains.		
3. The SNCD identifies existing professionals working with the individual/family and their thoughts of strengths/needs of the individual/family.		
4. The SNCD identifies friends, family or others that have helped the individual/family in the past or who are currently supporting the individual/family with a reciprocal relationship.		
5. The SNCD identifies the long-range vision for the individual/family that defines what life will be if these needs are met.		
6. The SNCD identifies priority needs that the individual/family wants to address first.		
7. The SNCD identifies strengths related to the prioritized needs identified by the individual/family.		
8. The SNCD identifies cultural aspects related to the prioritized needs identified by the individual/family.		
9. The SNCD identifies people that the individual/family would like to select to be on their team.		
10. The SNCD has been reviewed, revised and approved by the individual/family so they know they have the final word as evidenced by individual/family signature.		
TOTAL SCORE:		To pass the skill set, a total score of 8 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The individual/family's story has been summarized and the final SNCD identifies individual/family strengths and needs while establishing a prosocial view of their future.		

This form can be scored through documentation review.

WRAPAROUND Coaching Tools - Functional Assessment/Crisis Planning

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. Case Manager helps the individual/family identify potential crisis or safety situations that need crisis plan support.		
2. A functional assessment of the crisis behavior was conducted by the Case Manager or a therapist on the team involving the people who know the crisis the best prior to beginning crisis planning (if applicable).		
3. The plan identifies triggers and action steps related to these triggers designed to prevent future crisis behavior from occurring.		
4. The plan identifies external and internal signs the crisis or behavior is beginning and specific action steps to deescalate the behavior when these occur.		
5. The crisis plan includes a detailed, measurable and sequential set of action steps to be followed by the team if the crisis behavior does occur.		
6. The crisis plan includes who will do what and when.		
7. The crisis plan is a mix of natural and formal supports.		
8. The crisis plan is based on the strengths and culture of the individual/family.		
TOTAL SCORE:		To pass the skill set, a total score of 6.5 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The crisis plan has a clear focus on prevention and early intervention and will clearly assist the individual/family in times of need, providing them with the resources necessary to successfully navigate predicted crisis behavior.		

This form can be scored through documentation review.

WRAPAROUND Coaching Tools - Individual/Family Preparation for First Team Meeting

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. The Case Manager prepared the individual/family to be active participants in the meeting where an initial plan will be developed.		
2. The Case Manager reviewed the SNCD and agenda with the individual/family and revised per individual/family request prior to the meeting.		
3. The Case Manager has discussed and reached consensus with the individual/family about who will be on the team including discussing the importance of natural supports if none were initially identified.		
4. The Case Manager ensures that releases have been signed for each selected team member.		
5. The Case Manager helps that individual/family understand the purpose of the first team meeting and each agenda item.		
6. The Case Manager helps the individual/family understand how they can take responsibility for managing parts of the meeting process now and more in the future.		
7. The Case Manager helps the individual/family develop a plan for engaging each team member prior to the first meeting.		
8. Review the comfort of the individual/family regarding the planning process and being prepared for the meeting.		
TOTAL SCORE:		To pass the skill set, a total score of 6.5 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The Case Manager prepared the individual/family prior to the meeting to understand the purpose and fully participate in the planning process, helping the individual/family prepare to plan for themselves in the future.		

This form can be scored through field observation.

WRAPAROUND

Coaching Tools - Initial Team Meeting

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. The Case Manager prepared needed documents in advance for distribution prior to or at the team meeting.		
2. The Case Manager assisted the individual/family to do introductions of all team members by honoring their participation and strengths.		
3. The Case Manager elicited and developed team ground rules to support team input and value safety and team cohesion.		
4. The Case Manager discussed and developed consensus on confidentiality for the individual/family and team participation.		
5. Reviewed the individual's/family's vision with the team and facilitated refining as needed and gets consensus to support the vision (team mission).		
6. Assisted the individual/family and team to review, amend, reach consensus, and prioritize the list of individual/family needs.		
7. Reviewed and added to strengths and culture of the individual/family and team that relates to each identified need.		
8. Led a brainstorming process to identify multiple options for possible inclusion in the action plan to address each need.		
9. Supported the individual/family to select the best options, using the agreed-on decision making process.		
10. Developed short-term objectives for each action plan with clearly stated measurement strategies.		
11. Developed an action plan for each selected option that defines who will do what, when, where, how often.		
12. Led a team evaluation of the quality and outcomes of the meeting and obtained team suggestions to improve the next meeting.		
TOTAL SCORE:		To pass the skill set, a total score of 10 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The team meeting was facilitated by Case Manager resulting in a collaborative, productive, successful, safe planning process.		

This form can be scored through field observation.

WRAPAROUND

Coaching Tools - Wraparound Plan

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. The Wraparound plan is based on the vision the individual/family developed.		
2. The Wraparound plan includes a list of prioritized individual/family needs.		
3. The Wraparound plan includes strengths and culture of the individual/family and team that relates to each prioritized need.		
4. There is a list of robust brainstorming options for each need addressed including multiple natural and formal service options.		
5. The Wraparound plan has short-term objectives for each prioritized need with clearly stated measurement strategies.		
6. The Wraparound plan has involvement from the people selected by the individual/family to be on the team.		
7. The Wraparound plan has action steps for each selected option that defines who will do what, when, where, how often.		
TOTAL SCORE:		To pass the skill set, a total score of 5.5 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The Wraparound plan reflects the participation of all team members and identified needs have individualized and creative action steps that will help the individual/family meet their long-term vision.		

This form can be scored through documentation review.

WRAPAROUND

Coaching Tools - Follow-up Team Meeting

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. The Case Manager and individual/family engaged the team to get the designated team members to attend the meeting.		
2. The meeting started with introductions and a review of accomplishments and contributions of team members.		
3. The Case Manager reviewed the ground rules previously developed and reached consensus on confidentiality.		
4. The team reviewed the vision and previously identified priority needs.		
5. The team reviewed completion and progress on the current plan exploring why steps were not completed or successful if necessary.		
6. Reviewed strengths and culture of the individual/family and team that relates to any additions or changes to the plan.		
7. Identified new needs and led a brainstorming process to identify multiple natural and formal strengths-based and culturally appropriate support options.		
8. Developed or revised short-term objectives for each action plan with clearly stated measurement strategies.		
9. Developed or revised an action plan for each selected option that defines who will do what, when, where, how often and how team members actively participate in plan implementation.		
10. Evaluated the meeting by asking team members to share their observations about the quality of the meeting and obtain team suggestions to improve the next meetings.		
TOTAL SCORE:		To pass the skill set, a total score of 8 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The team meeting was facilitated in a way that resulted in a collaborative, productive, successful and safe planning process and maximized individual/family management of the meeting. Wraparound team meetings occur on a regular basis (every 30 days).		

This form can be scored either through field observation.

WRAPAROUND

Coaching Tools - Progress Notes

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. Documented preparing individual/family for SNCD.		
2. Prepared individual/family for first and follow-up team meetings.		
3. Engaging team members prior to the first team meeting was documented.		
4. The individual/family was debriefed on the team meeting soon after the meeting to determine their satisfaction with the process and plan.		
5. The Case Manager reviewed and arranged for anticipated needed supports for individual/family members or other team members.		
6. With increasing individual/family involvement monitor progress on the objectives.		
7. With increasing individual/family involvement review if services and supports are meeting needs and supporting progress toward individual/family vision.		
8. With increasing individual/family involvement honors team members for contributions and frequently celebrates individual/family successes.		
9. Demonstrates consistent contact with all team members.		
10. There is evidence of assessing for transition readiness prior to graduation.		
11. Help individual/family identify their culture of support to sustain Wraparound process after commencement.		
12. Transition Wraparound process to individual/family's culture of support.		
13. Continue to increase individual/family management of the team process and their overall Wraparound plan.		
TOTAL SCORE:		To pass the skill set, a total score of 10.5 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The progress notes reflect that the steps of Wraparound are being implemented in a way that supports success and purposeful transition.		

This form can be scored through documentation review.

WRAPAROUND

Coaching Tools - Transition Documents

Date:	Case Manager:	Organization:
Coach:	Individual/Family ID#:	

H = HIGH PROFICIENCY (1) M = MEDIUM PROFICIENCY (.5) L = LOW PROFICIENCY (0) NA= NOT APPLICABLE

SKILL	SCORE	COMMENTS
1. Support the individual/family to review and list accomplishments, team contributions and gains in readiness for transition.		
2. The transition plan includes a list of individual/family strengths.		
3. The Case Manager works with the individual/family to update the SNCD for use in the transition plan and summarizes lessons learned.		
4. The transition plan identifies needs, services and supports that are predicted to continue past formal Wraparound.		
5. The transition plan has detailed options to meet continuing needs.		
6. The transition plan includes a plan for crisis management that can be implemented without Wraparound staff.		
7. The transition plan identifies how the individual/family will continue to use the Wraparound process and how they will use their supports after formal Wraparound ends.		
8. The Case Manager helps the individual/family develop a culturally appropriate commencement activity.		
9. The Case Manager reviews the process with the individual/family to determine satisfaction.		
TOTAL SCORE:		To pass the skill set, a total score of 7.5 is needed and no "low" scores. The overall impression must be scored high (note this does not count in the numerical scoring).
PASS SKILL SET WITH PROFICIENCY? (Y/N)		
Overall Impressions: The individual/family reports that Wraparound was successful, and they feel comfortable navigating resources without the Case Manager.		

This form can be scored through documentation review.

APPENDIX C

WRAPAROUND SUPERVISION FORM

Case Manager:	Date of Supervision:	
Family Reviewed:	Date Opened:	
Brief Information about the family:		
Engagement (complete this section for new case managers or new families)		
Was the Wraparound process explained to the family?	Yes	No
Comments:		
Potential Team Members:		
SNCD		
Strengths: personal strengths to build on		
Challenges: what are the 3 biggest challenges for this family?		
Crisis Plan: was a copy given to the family?	Yes	No
Planning		
Date of the Child and Family Team meeting:		
Who was invited?		
Who attended?		
# of formal supports		
# of natural supports		

Were there any issues with:		
Ground rules?	Yes	No
Agenda?	Yes	No
Brainstorming?	Yes	No
Next meeting date and time?	Yes	No
Barriers regarding attendance?	Yes	No
Creating the Wraparound Plan?	Yes	No
Did team members receive a copy of the plan?	Yes	No
System partner plans were incorporated?	Yes	No
Comments:		
Implementation		
Tell me about the strategies and supports included in the Wraparound Plan. What is working? What are the barriers you are seeing? What are you doing to address these barriers?		
Is the child involved in community activities?	YES	NO
If yes, did they choose the activity?	YES	NO
If no, what are you doing to involve the child?		
Are you working on helping this child develop friendships with other youth? How?		
Was the Wraparound Plan reviewed at each Team Meeting?	YES	NO
Comments:		
Transitioning		
Describe the transition process.		
Feedback on the effectiveness of the Wraparound Plan and Implementation:		

Family's feedback:		
Team feedback:		
Case managers feedback:		
What will this family need in the future to be successful?		
Treatment	YES	NO
Resources	YES	NO
Natural Supports	YES	NO
Other (identify):	YES	NO
Describe future needs		
Who will be there to help this family when Wraparound ends?		
What are your plans to celebrate with this family and team		
Examples of Principles of Wraparound evidenced during Coaching		
Family Voice and Choice		
Team Based		
Natural Supports		
Collaboration		
Culturally Competent		
Individualized		
Strengths-based		
Unconditional		
Outcomes-based		