

WRAPAROUND COACHING MANUAL

Wraparound Florida Training
& Coaching Video Companion

Module 2:
Initial Family Engagement

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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MODULE 2

INITIAL MEETING WITH THE FAMILY

Engagement focuses on making a positive connection with the child and family to ensure that the family is committed to the Wraparound process. A case manager is charged with building that connection with the client. Initial engagement with the individual is one of the most critical steps in the Wraparound process. Often it begins with the initial phone call and is followed up with a face to face meeting. The first face to face meeting with the individual and their family sets the stage for the working relationship between the case manager and the individual they serve. This is when trust is established, and expectations are understood. It is the first time that the family can tell their story and be heard. It is also the time when individuals first learn about the Wraparound process and what that means. In order to successfully navigate this first step, the case manager must understand the Wraparound process in depth and be able to explain it to the family in a way that they understand. The case manager must slow down and actively listen in order to understand the needs of the individual. The family should feel that they have a voice in the process and that the process will benefit them. The case manager works to get to know the family, and their needs, so that they can start with the end in mind. This means that case managers will start transitioning individuals from day one. Once the needs of the individual are understood, the real work begins. Coaching the case manager to the above-mentioned elements ensures successful engagement with the family.

When coaching case managers on this aspect of the Wraparound process, it is important to use multiple techniques. It is helpful to use the Wraparound coaching video on initial engagement, written documentation and role playing to ensure that new case managers have the tools necessary to perform these tasks to proficiency. It is important that case managers understand what Wraparound is and how they can explain Wraparound in a way that the family will understand the process.

To begin coaching, the coach will provide the case manager with an opportunity to watch the Wraparound coaching video on Initial Family Engagement. When watching the video, new case managers should have a copy of the coaching tools to reference and are encouraged to take notes.

During the video, once the PowerPoint slides are finished, there is a short role play. This is a sample of what takes place during an initial meeting with the family. An initial meeting with the family traditionally takes 45 minutes to an hour, depending on the identification of immediate crisis needs. When watching the role play, ask case managers to utilize the coaching tool and identify action steps being demonstrated by the actors. Everything on the coaching tool will not be seen during this short video. However, ask them to identify what is shown. Ask case managers to make comments about the video and if there are any areas that need improvement.

Discussion Activity 2.1: MI Scaling

As their coach, this can be a good time to explore how the case managers are feeling and thinking about their confidence and ability to fulfill the Wraparound requirements of the initial meeting with the family. Separate out the task-oriented aspects of certification from the engagement activities and “take the temperature” of case managers regarding these two very necessary aspects of the first meeting is a good coaching strategy. How do they feel and think about doing both at the same time? You will be asking them to perform a set of scripted tasks as well as beginning to formulate a relationship of trust, support, and honesty.

- Ask CMs on a scale of 1 to 10 to rate their confidence and then rate the importance regarding these tasks for the first meeting.
- The results will indicate the level of preparation that will be needed.
- Depending on the results, more role playing might be necessary.

Importance and Confidence Ruler



Importance

How important is it to you to complete action steps?

On a scale of 0 to 10, with 0 being not important at all & 10 being very important:



Confidence

How confident are you that you could complete action steps? On a scale of 0 to 10, with 0 being not confident at all & 10 being very confident?

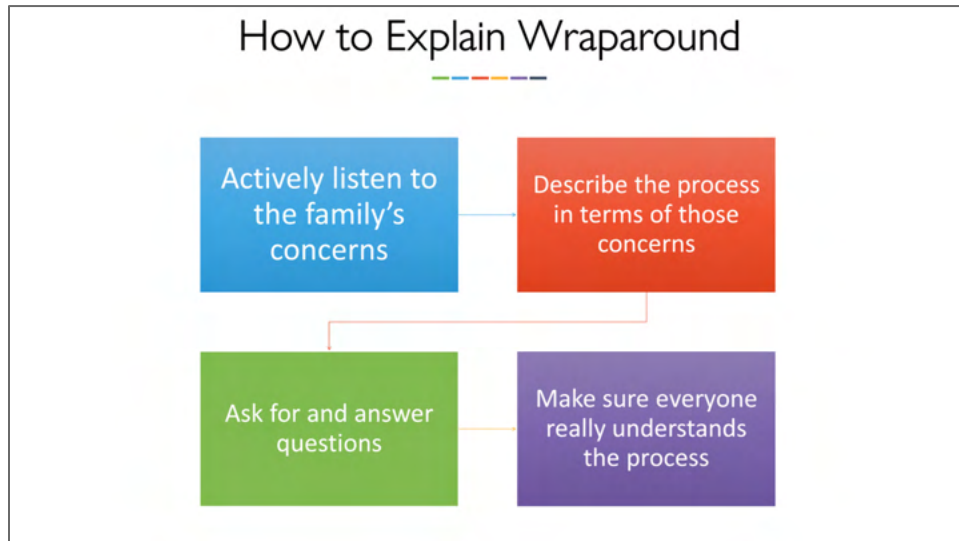


After watching the coaching video and reviewing Discussion Activity 2.1 (located above), the focus should be turned to 3 slides in the video. Allow for a discussion around these slides and practice necessary skills utilizing activities provided. This will support the learning process and help case managers gain the tools necessary to perform the skills to proficiency in this area.

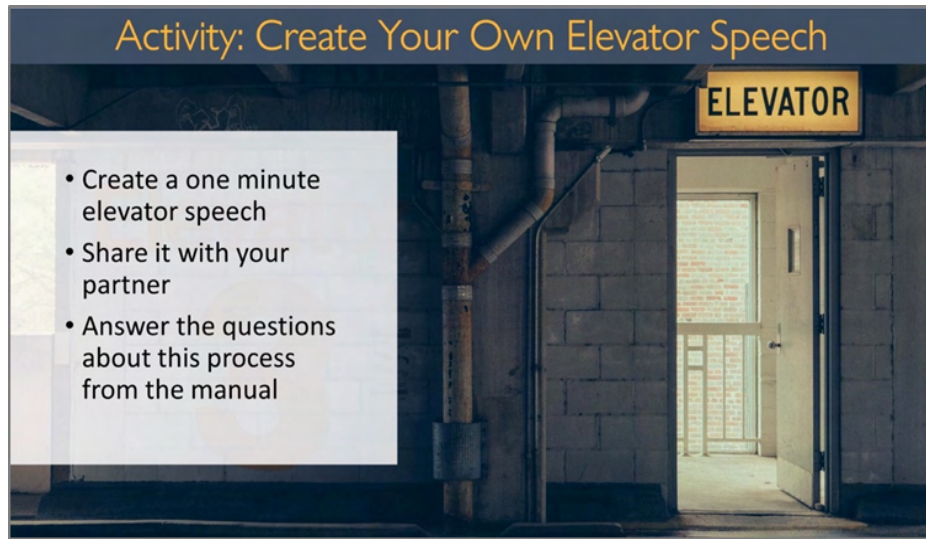
FIGURE 2.1: ENGAGEMENT STRATEGIES



Ask case managers to discuss each one of these items and provide examples. The coach can always help by providing examples if necessary. Ask case managers to explain how they typically engage those they serve and discuss strengths and challenges with engagement. Together determine methods to overcome those challenges utilizing the strengths of the case manager.

FIGURE 2.2: HOW TO EXPLAIN WRAPAROUND

Discuss the importance of fully engaging families and listening to their concerns before explaining Wraparound. The coach should have a discussion with the case manager around their understanding of Wraparound. It is helpful to work with case managers around the language that they use and give them words to explain the process. Wraparound is a model of case management. In Wraparound, the family oversees the planning process. Wraparound is a process used to support individuals and families by bringing a group of people together as a team to help families accomplish their goals. Wraparound includes planning and delivering services that builds on individual strengths and meets the needs that have been identified. Going further, the case manager should understand Wraparound and be able to explain how Wraparound benefits them as a case manager and how to engage system partners in the process.

FIGURE 2.3: ELEVATOR SPEECH

Coaches should work with case managers on writing a short generic elevator speech that is easy to remember. This activity is a great starting point for case managers that are asked about the Wraparound process in the community.

The next step in the coaching process is to review the coaching tools with the case manager and discuss the following:

- Explain who the case manager is and what organization they work with.
- Listen to the family's concerns/needs.
- Explain the Wraparound process and how it relates to the needs identified by the family. Use the needs that the family has identified when they were telling their story.
- Explain the team supported approach and the family's voice and choice during the process and that everyone in the family has a voice, including the child/youth.
- Let the family know that a team meeting will be scheduled and that providers and supports identified by the family will be invited to attend.

- Encourage the family to consider adding natural supports to their team (explain what natural supports are and why they are important).
- Explain confidentiality and when that may be broken (safety, legal implications).
- Explain mandated reporting and ensure the family knows what that is.
- Identify and assist with immediate needs (safety/basic needs such as food) and develop a plan to prevent this from happening in the future.
- Explain that the next step is to complete a Strength, Needs and Culture Discovery (SNCD) and explain what that is and the purpose (understanding the family to ensure plans and interventions match their family).
- If there is any paperwork to be completed, complete the paperwork at the end of the meeting.
- Document everything that took place.

**Utilize the brief examples of how
Wraparound can meet the teams needs
worksheet**

After reviewing the coaching tools, practice the process through role play. First, the coach should play the case manager role in order to model the Wraparound skills. Once the case manager has observed the skills, they should practice the role of facilitating the process. Have each role play include a small immediate stabilization situation that must to be solved by the case manager. This role play is to demonstrate for the case manager how to use the coaching tools. After the role play, provide the case manager with a written example of an

initial meeting with the family for review (attached: Engagement Phase-Example, Initial Visit with the Family handout). Sometimes case managers may need to practice this skill several times before they feel comfortable. Provide the case manager with the opportunity to practice these skills. Case managers can take the coaching tool to guide them when they perform this skill live with a family.

Remember, when case managers perform this skill for the first time, the coach will be there to offer support if needed. Let case managers know that they are not alone, and this is not a pass or fail test. Model the Wraparound process by helping them learn new skills and build confidence. It is also important for coaches to remember that case managers may be nervous that a coach is in the family home scoring them. Try to make the process as comfortable as possible. Provide them with the support they need and answer any questions they may have prior to the shadowing event.

EXAMPLE 1: TEAM NEEDS

Review the following statement for discussion:

How can Wraparound help meet the individual/family needs?

The information below should be copied and shared directly with the case manager. It provides an example of an initial engagement conversation between the case manager and the family.

The Wraparound process is a strength based and team supported approach that is guided by the individual/family. As a family, you will identify what needs you wish to address, and your team will work together to address those identified needs. The team will consist of professionals and other people that support you. The Wraparound process can help you meet your needs by the team coming together to develop a plan to address your identified needs. The responsibilities on the plan will be shared among the team members to ensure your needs are achieved as planned. Each team member offers different experiences, resources and abilities to ensure the plan is realistic and achievable. The Wraparound process will help you understand what is available to you in your community, how to access those resources and how to get the right people around the table to address future needs. The Wraparound team will advocate with you and ensure your voice is heard. The team will work with you to help you gain the tools and skills necessary for long term success.

Work with new case managers to develop a statement that explains how Wraparound can help meet System Partner needs.

The Wraparound process is a strength based and team supported approach that is guided by the individual/family. As a system partner, you are a vital part of the team. Without you, the family will not reach their highest potential. The Wraparound process can help meet your needs as a professional by:

Discuss with case managers how Wraparound will help meet their own professional needs with families.

Write answers below.

EXAMPLE 2: ENGAGEMENT PHASE

This is a sample role play where the coach is playing the role of the case manager and the case manager is playing the role of the family.

Coach: Good morning, thank you for allowing me to come to our home. My name is _____ . It is a pleasure meeting you, how are you today?

(Listen)

Coach: I would like to take notes of our meeting today, so I am sure that I capture what you are saying correctly. I will show you what I am writing if you like. Will it be ok with you if I take notes? Thank you. Please tell me how we can help you and your family?

(Listen)

Coach: Wraparound is a unique approach where we will work together to help you meet your goals. I will help you build a team to support you in solving whatever needs you identify. As a team working together, we are going to identify your strengths and then use those strengths to help you meet your needs. We want to make sure that the right interventions are put in place. The team is made up of service providers already in the home as well as natural supports such as family, friends and people in the community that care about you and your family. You will be able to choose who you want on your team, however, if you have legal involvement it will require the dependency case manager or probation officer to be on the team. We will develop your team together when we get to

that point in the process. I just want you to start thinking about who you would like on your team.

Wraparound requires that everyone who is supporting you works together to achieve your family goals. We are not here to tell you what you need. You know your family best and that is why your voice is vital to the process. Without you guiding the process, we will not be successful. Every voice in the family matters and is important to the process. Everyone will have tasks to complete and we will all work together to make progress. My promise to you is that I will do my part in this process and do everything I can to ensure that your family has the support that you need.

In the beginning I may show you how to do things, then we will work together to accomplish tasks and eventually you will be able to do them without my help. Together we will determine when your family is ready for transition from Wraparound. This is normally a 6-9-month process but that depends on your needs. The next step will be to complete a Strength, Needs and Culture Discovery (SNCD) with you and your family. A SNCD is the assessment in Wraparound and it will capture your family's strengths, needs and culture. This assessment will guide the process of planning and developing your goals. I will ask some personal questions in order to get to know you and your family so together we can make positive changes in your life. You can decline to answer a question at any time and that is ok. Eventually we will have monthly team meetings to plan, review and discuss important information that will help you achieve your goals. You will determine the time and location of the team meetings. In this process we will plan for potential future crisis situations to ensure that you are provided with resources that meet the needs of your family. In

Wraparound, you are guiding the process and everyone in the family will have input into the plan.

Coach (continued): I also want to inform you that my position does have limitations. An example of these limitations includes immediate access to funding to pay bills. However, if you have immediate needs, I can work with you to link you to programs that assist with this. I also do not have access to immediate housing. If this is a need for you, we can work together to try to obtain housing. I will help you through each step of the process to make sure that your voice is heard.

I want to let you know that everything we talk about will be confidential unless someone is a danger to themselves or others or if I learn of or suspect child abuse. Also, if there is legal involvement and the court needs to know something, I am required to provide that information. I am not an investigator, but I am what is called a mandated reporter. A mandated reporter means that by law I am required to report anything that I hear or observe that may place someone in danger. I don't believe this will ever be an issue, but if it is, I will tell you before anything is reported.

Do you have any questions so far? (If they have questions, answer them.)

Wonderful, since this will require you to be active in this process, please tell me if there is anything that needs to be done today to ensure your basic needs are being met. (If there is something that needs to be done today to ensure the family basic needs of food, clothing and shelter are being met then you should support them in meeting that need.) Examples of immediate needs are current or potential homeless, no food and no money to get food or utilities being turned off.

If there is an immediate need

- Engage the family in a conversation asking if this has ever happened before? What have they tried in the past? Was it helpful? Who do they call or turn to when they need help (providers, friends, family, etc.)? Where do they think we can go or who can we call for help now?
- Work with the family to brainstorm options to solve the immediate need. Do everything in your power to help them solve that immediate need before leaving the family's home. Develop a short-term stabilization plan if necessary.

If no current need is reported then that is ok, move on.

- Inform the family if they have immediate needs in the future, you are happy to do what you can to assist them. Ask the family if they have any questions about the Wraparound process and if they feel that the process will benefit them.

Coach: The next step in the Wraparound process is the Strength, Needs and Culture Discovery. This is a strength-based assessment of your family. This assessment is to tell your story and to get a comprehensive understanding of your family. We want to do what we can to understand your family and your situation so that the plans we develop together will match the strengths and culture of your family. Unless we have a clear picture, we will not know how to ensure the plan we develop is the best plan to meet your needs. Can we schedule a time to get together and talk so we can complete the assessment?

How do you think the meeting went today? Do you have any questions? Do you feel that the Wraparound process is something that can benefit your family?

Have all releases and pertinent paperwork for your organization signed before you leave the family home.