Phases and Activities of the Wraparound Process
(Based on the input of 29 people with 2 additional people providing comments but no ratings on individual items)

The table below outlines the proposed phases and activities that must be included in a full wraparound process. After reviewing the document, please provide the requested feedback by typing or writing in the table. We ask that you

1. Provide ratings for each activity as requested. A rating of “fine” indicates basic agreement with the description of the activity, while “so-so” indicates that only minor wording changes are needed. If you rate an activity as “inadvisable” or “unacceptable,” please provide a brief reason in the comments section associated with that rating. Feel free to provide comments even if you gave other ratings for the activities.

2. Comment if you wish on each phase at the end of the phase as requested, and on the entire document at the end.

Please fax or email your responses by SEPTEMBER 10 to Kathryn Schutte (email: kmschutt@pdx.edu FAX: 503.725.4180) or contact her by phone for assistance (503.725.8464).

Some notes:

- From the way the activities below are worded, a facilitator is responsible for guiding, motivating, or undertaking the various activities. This is not meant to imply that a single person must facilitate all of the activities, and we have not tried to specify exactly who should be responsible for each activity. The various activities may be split up among a number of different people. For example, on many teams, a parent partner or advocate takes responsibility for many of the activities associated with family and youth engagement, while a care coordinator is responsible for many of the other activities. On some teams, a care coordinator takes on most of the facilitation activities with specific tasks or responsibilities taken on by a parent, youth, and/or other team members.

- The families participating in wraparound, like American families more generally, are diverse in terms of their structure and composition. Families may be a single biological or adoptive parent and child or youth, or may include grandparents and other extended family members as part of the central family group. If the court has assigned custody of the child or youth to some public agency (e.g., child protective services or juvenile justice), the caregiver in the permanency setting and/or another person designated by that agency (e.g. foster parent, social worker, probation officer) takes on some or all of the roles and responsibilities of a parent for that child and shares in selecting the team and prioritizing objectives and options. As youth become more mature and independent, they begin to make more of their own decisions, including inviting members to join the team and controlling aspects of the wraparound process.

- The use of numbering for the phases and activities described below is not meant to imply that the activities must invariably be carried out in a specific order, or that one activity or phase must be finished before another can be started. Instead, the numbering and ordering is meant to convey an overall flow of activity and attention. For example, focus on transition activities is most apparent during the latter portions of the wraparound process; however, attention to transition issues begins with the earliest activities.
**Phases and Activities of the Wraparound Process Results**

**PHASE 1: Engagement and team preparation**
During this phase, the groundwork for trust and shared vision among the family and wraparound team members is established, so people are prepared to come to meetings and collaborate. This phase, particularly through the initial conversations about strengths, needs, and culture, sets the tone for teamwork and team interactions that are consistent with the wraparound principles. The activities of this phase should be completed relatively quickly (within 1-2 weeks if possible), so that the team can establish ownership of the process from the beginning.

**MAJOR TASKS/GOALS**
1. **Orient the family**

GOAL: To orient the family to the wraparound.

**ACTIVITIES**
1. **Orient the family and youth to wraparound**
Facilitator explains the wraparound philosophy and process to the family, answers questions, and addresses concerns. Facilitator describes service options to wraparound and asks family if they choose to participate in wraparound. Facilitator describes options and offers supports for family roles/partnership on teams (e.g. family/youth may want coaching so they can feel more comfortable/effective in partnering with other team members).

**YOUR RESPONSES**

1) An activity of this nature is:

- 29 = essential
- 11 = so-so
- 0 = inadvisable

2) The description of this activity, as worded is:

- 18 = fine
- 11 = so-so
- 0 = unacceptable

**Comments:**

(essential/so-so): It sometimes creates a problem when you discuss “service options” before identifying the need for them. Too much too soon impedes planning later.

(essential/fine): I feel it's important for the family to have an understanding of the process as well as the possible numbers of persons who will be involved.

(essential/so-so): First, let’s ensure this orientation to the process is only to give the family the information they need to participate in it (or evaluate it as one of multiple options) – NOT to try to teach the family the esoteric language of our wraparound process. Second, discussing “service” options to the family at one of the first contacts with the family should not inadvertently preempt service planning by the full wraparound team yet to come. Some people may read this and take it to mean, discussing what services the wraparound team can provide to the family. [In our state we are developing a BH system that offers no alternative TO wraparound, so the notion of wraparound as one of multiple options would not fit.

(essential/so-so): Should be done for the whole team at once from the very beginning, not just the family.

(essential/so-so): I am not sure as to what these means. It is a bit confusing to me. – referring to: “Facilitator describes service options to wraparound and asks family if they choose to participate in wraparound. Facilitator describes options and offers supports for family roles/partnership on teams...”

(essential/fine): Might emphasize brevity and clarity of description by the facilitator as the point is to do WA quickly rather than talk about it a lot.

(essential/so-so): Families also need to be informed that this requires a commitment from them. Most of our communities have the families sign an agreement detailing what will be expected of them and what they can expect from others at this point.

(essential/fine): It should be noted that this phase must be concurrent with an individual mental health assessment of the child -- usually, but not always, provided by a mental health professional who is part of the team.

(essential/so-so): Worry about “if they choose” used here. Some counties court order.
Phases and activities—p.3
(essential/so-so): Not clear on what “describes service options to wraparound” means.
(essential/fine): May have to be very simple at first contact; usually parents at this stage are overwhelmed and may need this repeated several times.
(essential/fine): May want to follow this section with #1.5b. Legal/ethical issues need to be clarified and addressed very early in the intervention, particularly when (state) dependent children are involved, probation or parole issues exist, etc.
(essential/so-so): Choice to participate may occur before this time. This might focus more on info, on issues.
(essential/so-so): 2nd sentence - Facilitator describes the process of identifying service options to wraparound and asks the youth and family if they …….. Specifically, what is meant by service options in the 3rd sentence? Facilitator describes options? And offers supports for youth/family roles/partners on team …….. Needs to specifically state PEER supports.
(essential/so-so): Would change to “Orient the family and youth to wraparound process”; kind of wordy; example given is very long.
(essential/fine): Listening, engaging, and rapport building are essential in the first meeting. You lose the cultural competency piece of understanding the family culture if you don’t do this from the first meeting. Ideally, the family advocate should attend this meeting with the facilitator to explain his/her role and it also helps in building the relationship.
(essential/so-so): Describing service options to wraparound sounds as though there is a list of services to offer. This sounds somewhat categorical in nature and pre-determined. Also, the Facilitator would be confirming the family’s choice to participate in wraparound. The family referral has already been, “no reject”. The Facilitator at this point should be confirming the family’s interest to continue to participate and to address any concerns that may have come up during the process.

MAJOR TASKS/Goals
1.2. Stabilize crises
GOAL: To address pressing needs and concerns so that family and team are psychologically available to participate in the wraparound process. (Note: Team engages in proactive and future-oriented crisis/safety planning during phase 2.)

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<tr>
<th>ACTIVITIES</th>
<th>YOUR RESPONSES</th>
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<tr>
<td>1.2 a. Ask family and youth about immediate crisis concerns</td>
<td>1) An activity of this nature is:</td>
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Facilitator elicits information from the family about immediate safety issues, current crises, or crises that they anticipate might happen in the very near future. These may include crises stemming from a lack of basic needs (e.g., food, shelter). |
| 21 = fine 8 = so-so = unacceptable |

Comments:
(essential/so-so): I would include “worries” too.
(essential/fine): This is essential because the facilitator needs to understand what the family considers to be a crisis.
(essential/so-so): Should also be done as a team approach. Team nature should be built from the first interaction.
(essential/fine): Could we add utilities to the examples.
(essential/so-so): Might include emphasis primarily on rest/relief/safety as key elements of crisis response at this level as a way of differentiating from fuller crisis planning later.
Phases and activities—p.4
(essential/so-so): The crises are defined by the family. Since this is about family voice and choice, we need to somehow include that what the family sees as a crisis may not be a crisis to the others involved.
I don’t like the term “psychologically available”. It seems to perpetuate the stigma. Maybe “able to focus” or something less clinical?
(essential/so-so): needs to include MH assessment.
(essential/fine): Clear, non-judgmental.
(essential/fine): Should time-frames be added?
(essential/fine): Probing questions; read between the lines.
(essential/fine): Very good. This is critical.
(essential/fine): Add language about reviewing previous crises and how they were handled.
(essential/so-so): Facilitator elicits information from the youth and family about immediate safety issues, past crises and their resolution, current crises ……
(essential/so-so): Activity wording is fine, Goal wording isn’t. Use of the term “psychologically available” doesn’t fit all that well with the example of a crisis stemming from lack of food or shelter (perhaps “nutritionally available”). Seriously, though, maybe just deletion of the word “psychologically” would suffice.
(essential/so-so): There are other crises that need to be addressed if the youth is at risk for hospitalization, or self-harm, etc. That should be included so that facilitators aren’t only considering basic needs as immediate crises.
(essential/so-so): I would explain to family that crisis work will not be the standard of operation so that the wrap process does not go from 1 crisis to the next.

ACTIVITIES
1.2 b. Elicit information from agency representatives and potential team members about immediate crises or potential crises
Facilitator elicits information from the referring source and other knowledgeable people about pressing crisis and safety concerns.

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<th>YOUR RESPONSES</th>
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<td>1) An activity of this nature is:</td>
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<td>25 = essential 3 = optional = inadvisable</td>
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<tr>
<td>2) The description of this activity, as worded is:</td>
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<tr>
<td>26 = fine 3 = so-so = unacceptable</td>
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Comments:
(optional/fine): The facilitator needs to understand what the family considers to be a crisis, vs anyone else.
(essential/fine): Time frame?
(essential/fine): Should it be clarified that consent from families should be obtained before activity 1.2.b where the facilitator is eliciting information from the referral source? (maybe your notes up front about tasks not necessarily in this order covers that)
(essential/fine): Changed wording of item to read: “Elicit information from agency representatives and potential team members about previous, immediate or potential crises.” The youth is why you’re meeting (primarily) and the family is the guardian and both must be invested in the plan. We must show respect and value and need for responsibility with the youth (not preference) and the family if we want them both to partner with us.
(essential/fine): Typo – Pressing crisis should be pressing crises.
(essential/fine): You need to get family consent here not later. It will facilitate the trust building process and it’s the family’s right. This will naturally come out as you listen to the family’s story.
(essential/so-so): Can we include family members in this discussion—many families feel distrust when providers don’t include them on conversations?
(essential/so-so): Facilitator should also be gathering information about strengths and potential resources to develop response strategies for the safety plan during phase 2.
### ACTIVITIES

1.2 c. **If immediate response is necessary, formulate a response for immediate stabilization**

Facilitator and family reach agreement about whether concerns require immediate attention and, if so, work to formulate a response that will provide immediate relief while also allowing the process of team building to move ahead.

### YOUR RESPONSES

1) An activity of this nature is:
   - 29 = essential
   - = optional
   - = inadvisable

2) The description of this activity, as worded is:
   - 22 = fine
   - 7 = so-so
   - = unacceptable

### Comments:

- **(essential/so-so):** Facilitator should move ahead with family, and keep team informed until all are in place.
- **(essential/so-so):** With help of rest of team, at team meeting.
- **(essential/so-so):** We have to convey the risk of doing too much at this point so that the facilitator is viewed as the primary service provider and the impetus for change is lost.
- **(essential/fine):** Might emphasize not forgetting natural supports as resource options in this phase, i.e.; “this response plan will include family and natural support responses whenever possible.”
- **(essential/so-so):** Families sometimes just need a crisis plan that consists of calling someone which may seem logical, but is not when you are in a crisis and are caught up in “the heat of the moment”.
- **(essential/fine):** Changed wording for item to read: “If immediate response is necessary, formulate a response for immediate intervention and/or stabilization.” Such as: If the youth is exhibiting a present danger to himself or others, clear and specific steps to accomplish stabilization must be clearly written not just a statement like place youth in hospital. How do we plan to intervene in order to safely get the youth to the hospital? What steps should be taken considering the youth and families’ history and experiences? As Karl always says “We don’t plan to fail, we fail to plan.”
- **(essential/so-so):** Again, too wordy. Maybe I’m missing the point, but wouldn’t this be enough:

  **Develop crisis stabilization response:**

  Facilitator and family work together to formulate a response that will provide immediate crisis relief.

- **(essential/so-so):** If there is immediate need for stabilization, the crisis plan should happen immediately. Facilitator should guide a discussion around what has worked in the past. Strengths, etc. An actual crisis plan needs to be developed and a copy left with the family. Providing “immediate relief” is creating a “fix” rather than a longer term solution and a beginning understanding of the process. Family advocate should also be involved in all of these processes.

- **(essential/so-so):** The Facilitator working directly with the family at this point to make a decision should be discussed within the context of a team. It is advisable that the Facilitator not be put in a position of or perceived as being able to make “unilateral” decisions with the family. It is preferable at this phase that the Facilitator be perceived as an access point to resources rather than an “out of team” decision maker.
## MAJOR TASKS/Goals

1.3. Facilitate conversations with family and youth/child

**GOAL:** To explore family strengths, needs, culture, and vision and to use these to develop a document that will serve as the starting point for planning.

### ACTIVITIES

1.3 a. Facilitate exploration with child/youth and family of their strengths, needs, culture, and vision

Facilitator meets with the family to hear their story; gather their perspective on strengths, needs, elements of culture, and long term goals or vision; and learn about natural and formal supports. Facilitator helps family identify potential team members and asks family to talk about needs and preferences for meeting arrangements (location, time, supports needed such as child care, translation).

### YOUR RESPONSES

1) An activity of this nature is:
   - 28 = essential
   -  = optional
   -  = inadvisable

2) The description of this activity, as worded is:
   - 19 = fine
   - 8 = so-so
   -  = unacceptable

#### Comments:

- **(essential/unacceptable):** At the team level, done with the entire team, for the entire team.
- **(essential/so-so):** “Facilitate exploration” is awkward.
- **(essential/so-so):** How about “learn from the family about their strengths ….” I would add “…asks family to talk about strengths, needs…”.
- **(essential/so-so):** Is the ‘vision’ word understandable to families or perhaps professional jargon?
- **(essential/so-so):** Don’t like the term goals – confuse the process.
- **(essential/fine):** Changed language in of item to read: “Facilitator meets with the youth and family to discuss their EXPERIENCES, gather their perspectives regarding their individual and collective strengths, needs, elements of culture …..”
  - our lives are not our “stories”, they are usually painful experiences
  - individuals make up a family, each brings something different to the unit.”
- **(essential/so-so):** Again, my concerns are with the “major Tasks/Goals” column more than the “activities” column. “Facilitate conversations” is way too vague. It is unclear as a task, even though the goal beneath clarifies. However, that is problematic because the Task is at odds with the Goal as written. The Task refers to “conversations” while the Goal is development of a written document. These are different. I would want this clearly stated. Do you mean something like “Have a dialogue with the family about their strengths, needs and culture”? If so, then that is what the Task should be.
- **(essential/fine):** Added “story” to goal description statement “To explore family story” and also added “youth” to activities description to read “Facilitator meets with the family and youth.”

This should begin in the first meeting. If you have a facilitator show up and talk about the process and their agenda, you are just like all the other workers and agencies in the past. This is on going, but should begin day one.

- **(essential/so-so):** Often wrap facilitators don’t understand the concept of culture-perhaps some examples would be useful. e.g. How is child rearing preferred within your extended family?
- **(essential/so-so):** There is an opportunity at the point to also identify potential community and natural supports. This is a difficult component to develop in many wraparound communities.
**ACTIVITIES**

1.3 b. Facilitator prepares a summary document

Using the information from the initial conversations with family members, the facilitator prepares a strengths-based document that summarizes key information about family strengths, needs, culture, and vision. The family then reviews and approves the summary.

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<th>YOUR RESPONSES</th>
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<tr>
<td>1) An activity of this nature is:</td>
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<td>22 = essential</td>
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<tr>
<td>2) The description of this activity, as worded is:</td>
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<td>21 = fine</td>
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**Comments:**

(optional/fine): think some of this is a style difference. Some experienced facilitators can still facilitate the team after doing the homework. I think doing it this may can sometimes "unintentional harm" team unity. I do not believe this should be mandatory. Time is important but on some teams this could set them back.

(essential/so-so): I actually solicit information from team members prior to the creation of this document. While I do not add the needs that have been identified (I believe this should be done collectively) – having strengths included on the first inventory from others seems to be a building block to trust and team building. Also the strengths/needs document is sent out to team members prior to first meeting after it is reviewed by family and the family indicates that this accurately reflects their family.

(essential/so-so): Strengths assessment integrated with needs of the child (i.e. diagnosis and tx needs).

(essential/fine): Document should be more defined.

(optional/fine): I’m only thinking about the reality of the work load.

(essential/fine): Changed language in item to read: “….facilitator prepares a strengths-based document that summarizes key information about individual family members strengths and the strengths of the family unit, needs, culture ……..”

(essential/unacceptable): Wording of the activity is fine, but it’s not listed in the Tasks - Summary document is not in Tasks.

(optional/so-so): Is it assumed that the youth member is part of this discussion? Not sure. This task is a great educational piece for the family, a way to emphasis how much the family understands the unfolding wraparound process. However, I’m not sure how much it benefits the actual planning process.
Phases and activities—p.8

MAJOR TASKS/Goals
1.4. Engage other team members
GOAL: To gain the participation of team members who care about and can aid the youth/child and family, and to set the stage for their active and collaborative participation on the team in a manner consistent with the wraparound principles

ACTIVITIES
1.4 a. Solicit participation/orient team members
Facilitator approaches potential team members identified by the family, describes the wraparound process, and talks with them briefly to learn their perspectives on the family’s strengths and needs, and to learn about their needs and preferences for meeting.

YOUR RESPONSES
1) An activity of this nature is:
   25 = essential  1 = optional  = inadvisable
2) The description of this activity, as worded is:
   21 = fine  5 = so-so  = unacceptable

Comments:
(essential/so-so): Add: “...explains team member responsibilities and asks family if they choose to participate in the wraparound team.”
(optional/so-so): Families may want to do this themselves or want to do it together so I don’t like the way this one is written. I think it should be more inclusive.
(essential/fine): I would suggest the facilitator also identify the team member’s strength as well as their needs, etc. Facilitator should clarify their potential role on the team because it could be different than their relationship or profession, i.e. Teacher assistant that is there as child’s advocate or friend of parent.
(essential/so-so): Due to the numerous variations of wraparound it has become discredited in our community. The one thing that I constantly talk about with families and professional team members is the ability to dis-engage at any time if they feel it is a duplication of a ‘service’ such as case management. This has assisted me with engaging the professionals. Families are usually the ones very opened and wanting to try.
(essential/so-so): Might include the facilitator describing team participant roles, i.e. shared decision making, joint planning and action as expectation for team members on a successful team.
(essential/fine): I would also ask potential team members if they want to be a team member.
(essential/fine): Should there be any discussion about how many and which team potential team members a facilitator should approach and learn perspectives from (activity 1.4.a) as preparation for a team meeting as this is a frequently asked question when training new facilitators. You could look at "Preparing for Team Meetings: Initial Conversations" on page 33 of the Art and Science of Wraparound if you want to see an example of how to clarify who a facilitator should engage before team start-up if you think it would be helpful. Or maybe this is too much detail for what you are doing...
(essential/so-so): Should include determining potential conflict.
(essential/fine): Changed wording of goal to read: Goal: “.....manner consistent with the wraparound principles and values.”
Item 1.4a language changed to: “.....team members identified by the youth, family ...” The youth/child may have a teacher, uncle, counselor they wish to be included.
(didn’t rate): There should be something here that is analogous to the orientation to Wraparound for the family. Providers often find that other providers need the same orientation process to be able to participate fully in the process. Why not have a parallel description to 1.1a?
(essential/fine): Help providers understand the concept of family involvement.
### MAJOR TASKS/Goals

**1.5. Make necessary meeting arrangements**

**GOAL:** To ensure that the wraparound team is prepared to begin an effective team process, and that mandated procedures are undertaken.

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<tr>
<th>ACTIVITIES</th>
<th>YOUR RESPONSES</th>
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<tbody>
<tr>
<td><strong>1.5 a. Arrange meeting logistics</strong></td>
<td>1) An activity of this nature is:</td>
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<tr>
<td>Facilitator integrates information gathered from all sources to arrange meeting time and location and to assure the availability of necessary supports or adaptations such as translators or child care. Meeting time and location should be within the community and be comfortable to the family and other team members. Facilitator prepares materials—including the document summarizing family strengths, needs, culture, and vision—to be distributed to team members.</td>
<td>26 = essential 1 = optional = inadvisable</td>
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<td></td>
<td>2) The description of this activity, as worded is:</td>
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<td></td>
<td>19 = fine 6 = so-so 1 = unacceptable</td>
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### Comments:

- **optional/so-so**: Just the preparing materials if you have another way of facilitating this in the meeting. See 1.3b for more explanation.
- **essential/fine**: I would suggest if possible the facilitator distribute prep materials prior to meeting.
- **essential/so-so**: I also send out a tentative agenda based on the discussions with family and professionals – it helps center the team and pulls back to agenda versus goes off in discussions that are not helpful.
- **essential/so-so**: Address the ‘authority’ of the facilitator to invite and coordinate all partners into the wraparound meeting, so as to avoid wrap plans with no credibility with schools, juvenile courts, or child welfare.
- **essential/fine**: We have found that some families prefer meeting in an office location that help formalize and focus the meeting.
- **essential/fine**: Question: under “major tasks” what does the word “mandated” refer to? Is it pertaining to legal issues (as in 1.5b below)? It seems a little unclear.
- **essential/unacceptable**: Meeting should be where people want, it could be in an office.
- **essential/so-so**: 3rd sentence: “Facilitator prepares materials -- including the document summarizing the individual and family strengths, ….”
- **essential/so-so**: Is the “goal” wording here necessary? It seems that the Task is nicely and succinctly written, and says it all.
- **didn’t rate**: Changed language of 2cd sentence in “activities” to read: “Meeting time and location should be within the community and be comfortable to the family, youth and other team members. Facilitator prepares materials—including the document summarizing family strengths, needs and current strategies, culture, and vision-- to be distributed to team members.
- **essential/fine**: Many families in poverty do not want meetings in their homes-give options
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<tr>
<td><strong>1.5 b. Address legal and ethical issues</strong></td>
<td>1) An activity of this nature is:</td>
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<tr>
<td>Facilitator reviews all consent and release forms with the family and youth, answers questions,</td>
<td>26 = essential 1 = optional = inadvisable</td>
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<td>and explains options and their consequences. Facilitator discusses relevant legal and ethical</td>
<td>2) The description of this activity, as worded is:</td>
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<td>issues (e.g. mandatory reporting), informs family of their rights, and obtains necessary consents</td>
<td>21 = fine  5 = so-so = unacceptable</td>
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<td>and release forms before the meeting.</td>
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**Comments:**

(essential/so-so): Is this done before the first team meeting? Who has to be present during this process?

(essential/so-so): It is important to discuss relevant legal and ethical issues with the entire team. So, I would say at a minimum the discussion should include confidentiality, how to create a psychologically safe environment and legal and ethical issues. The entire team needs to know about mandatory reporting (especially if the team has a lot of natural supports on it).

(essential/so-so): See above - address the buy in of other agencies into the wrap process.

(essential/fine): Suggest moving this to 1.1b.

(essential/fine): This should appear before 1.5b.

(essential/so-so): Added wording: Facilitator will communicate with the youth to ensure his/her understanding that;

1. the process and the projected outcomes are identified with his/her input,

2. the values and principles of wraparound are clearly understood, and to assure them that their voice is valuable to the success of the process.

(essential/fine): Actually we present this information a little early on to ensure HIPPA compliance and confidentiality as well as review mandatory reporting requirements to avoid conflicts.

(essential/so-so): This should be a separate task from “meeting arrangements”. This is typically done in a very first meeting with the family, and hopefully would be done prior to a meeting.

(didn’t rate): This should happen at the first meeting. There should also be an expiration date on the consent forms so that the family knows that they are not consenting to forever, but for the next 6 months at which time, new forms will need to be signed. There should also be confidentiality forms signed by all team members before or during the first CFT meeting.
**Phase overall:** Are there particular activities that are missing from this phase (if so please describe) or that belong in a different phase? Other comments about this phase:

- We have developed this model as a service development and implementation tool. We don’t talk about the interface between intervention and assistance when the assistance is being developed in the context of an involuntary, court driven process. I wonder if we need to talk about a step that addresses the resolution of responsibility when there is a court mandated intervener, such as a cps or probation worker. This is especially important when the basis for court intervention has not been resolved, when participation by various family members may be limited or prohibited by court order (such as when a birth parent’s rights have been terminated and there is an active no-contact order).
- It might be clearer to add an item right at the beginning about the facilitator making initial arrangements to visit the family and that the visit should be face-to-face.
- Some wraparound projects have multiple staff involved, even from the beginning. These projects often have created a step where internal wrap staff meet to get clear about roles and tasks in the actual team meeting. They clarify who supports the parent, the youth, they strategize about anticipated difficulties ion the first meetings etc. This might be included in the description as an optional step for projects involving multiple staff in the beginning phases of wraparound.
- I think that included in the orientation to wraparound should be on the shift in thinking from the family being taken care of and told what to do to the family being an integral part of the process and how important the family voice is. If the family doesn’t think something will work for them, then it probably won’t.
- The description assumes that other agencies, schools, and institutions ‘honor’ the wraparound process. Often the facilitator must be skilled to gain the buy in of other entities to this process, so as not to subject the family and child to overlapping and contradictory messages about ‘one plan’.
- Set the stage for transition planning.
- 1.5b. could be done at an earlier point in time and some of the legal and ethical issues may need to be handled at the same meeting where wraparound is initially explained.
- Throughout this document, the youth voice isn’t consistently included in a way that is child/youth friendly. If we want respect and buy-in from them, then we must demonstrate respect and that their input and voice is valuable. Youth should always be consistent in this document it should read “child youth and family” throughout unless where the adult must sign agreement (legal).
- The way the tasks, goals, and activities are delineated is confusing. In general, the wording of the activities is fine. It’s the overall organization, and the wording of the tasks and goals that I have concerns about.
- The crisis plan should be developed no matter what in this phase. Within the first week of the initial family meeting.
- I have found that wrap facilitators do not really understand the role of culture for a family-they may have a theoretical understanding but not a practical one-When a facilitator asks a family member” How does your culture play a role,.. they often get a blank stare-It would be a good idea to offer examples of questions-It has also been useful to speak to a family about the unique culture that arises in a family as it tries to parent youth with challenges.
- I could not get a sense that these activities were repeated during the initial contact with the family. It is important to be able to communicate the process and not alarm the family when such things as mandated reporting, rights, and consent forms are discussed. Hopefully some of this is being mentioned, however, not necessarily performed, during the initial contact. This is a different experience for families. We should reiterate legal and ethical issues throughout the initial phase to ensure the family’s understanding of these matters while alleviating potential fear and concern about this topic area.
PHASE 2: Initial plan development

During this phase, team trust and mutual respect are built while creating an initial plan of care using a high quality planning process that reflects the wraparound principles. This phase should be completed during one or two meetings that take place within 1-2 weeks, a rapid time frame intended to promote team cohesion and shared responsibility toward achieving the team’s mission or overarching goal.

MAJOR TASKS/Goals

2.1. Develop an initial plan of care

GOAL: To create an initial plan of care using a high-quality team process that elicits multiple perspectives and builds trust and shared vision among team members, while also being consistent with the wraparound principles.

ACTIVITIES

2.1 a. Determine ground rules

Facilitator guides team in a discussion of basic ground rules, elicits additional ground rules important to team members, and facilitates discussion of how these will operate during team meetings. At a minimum, this discussion should address confidentiality and how to create a psychologically safe environment for youth/family.

YOUR RESPONSES

1) An activity of this nature is:

   27 = essential  = optional  = inadvisable

2) The description of this activity, as worded is:

   15 = fine  11 = so-so  = unacceptable

Comments:

(essential/so-so): and “and all team members.” At the end of the description.
(essential/so-so): I don’t like the term “psychologically safe” environment. I think open or safe environment is enough.
(essential/so-so): Essential to address confidentiality, but keep short.
(essential/so-so): See previous comment: It is important to discuss relevant legal and ethical issues with the entire team. So, I would say at a minimum the discussion should include confidentiality, how to create a psychologically safe environment and legal and ethical issues. The entire team needs to know about mandatory reporting.
(essential/so-so): And should clearly address that this is a strengths-approach, and explain what that means in practice.
(essential/fine): At some point early on it’s important to ask team members to describe their roles and goals with regard to the child and family.
(essential/fine): How about “safe and blame free”.
(essential/fine): His is so important. Often times professionals are uncomfortable with this but I have found that it really sets a tone for how we are agreeing to interact with each other and also established accountability. Very essential!!!!
(essential/so-so): I think “safe environment” would work just as well as “psychologically safe”. Again, this specificity just perpetuates the stigma.
(essential/didn’t rate #2): Include discussion of legal responsibilities of partners.
(essential/so-so): I would suggest emphasizing parent voice, veto power, no meetings without the family, major decisions are made within the team… as non-negotiable ground rules (somewhere in the sentence that starts “at a minimum…”).
(essential/so-so): Added to the language of the Phase: “During this phase, … that reflects the wraparound principles and values.”

Also, language of 2.1a: “ensure that written ground rules are provided to the youth, family and other team members.”
(essential/fine): Would change task to “Develop an initial plan of care through the team process.”
(essential/so-so): Facilitator should also discuss with the team how they will agree to address mandated reporting should the need arise. There should also be agreement for the decision making process related to how the team will make decisions.
ACTIVITIES

2.1 b. Describe and document strengths
Facilitator presents strengths from the summary document prepared during phase 1, and elicits feedback and additional strengths, including strengths of team members and community.

YOUR RESPONSES
1) An activity of this nature is:
   26 = essential  1 = optional  = inadvisable
2) The description of this activity, as worded is:
   20 = fine  6 = so-so  = unacceptable

Comments:
(optional/so-so): Short explanation of what strength based means and how everyone operates from that philosophy.
(essential/so-so): This strengths review with the team needs to be succinct and not take a long time given the 1 -2 meeting framework to get to a plan. Not all teams emphasize team member strengths at the outset of the process.
(essential/fine): One would anticipate that Strengths discovery is an ongoing process
(essential/fine): Good to include community.
(essential/so-so): Strengths across life areas?
(didn’t rate): Added language to “Activities” to read “…and elicits feedback and additional functional strengths.”
(essential/so-so): Sometimes a strength discovery just becomes a list of personal qualities-stress the importance of action strengths- Such as Mary is not just “well organized” but she has skills about list making and will organize team priorities.

ACTIVITIES

2.1 c. Create team mission
Facilitator reviews family’s vision, and leads team in setting an overall team mission, introducing idea that this is the overarching goal that will guide the team through phases and onto transition from formal wraparound.

YOUR RESPONSES
1) An activity of this nature is:
   26 = essential  = optional  1 = inadvisable
2) The description of this activity, as worded is:
   23 = fine  2 = so-so  2 = unacceptable

Comments:
(essential/fine): Essential that everyone seeks to promote family vision - no matter what?
(essential/fine): With child welfare – “an overall team mission and agreement on permanency, introducing…”
(essential/fine): Usually when doing strengths and needs this will appear as a need – needs are often interchangeable with overarching goal. I have found people struggling to understand this. For example the overarching goal that I most often work with is “to return home and live with my parents” – although this is found in the needs section – it has been identified as the overarching goal. Several other needs are tied to this. It really provides a direction for the team.
(essential/fine): Might include clarifying description that a mission statement is a one or two sentence summary of what the team is working toward with the family.
(essential/unsatisfactory): ‘Vision’ and 'mission' may be professional jargon; look for more concrete terms to describe team authority.
(essential/so-so): “…onto transition from formal wraparound.” is not clear.
(essential/so-so): Change language of item to read: “Facilitator reviews youth’s and families’ vision, …”
(inadvisable/unsatisfactory): Huh? What is the “team mission”? How does this differ from developing the plan of care?
### ACTIVITIES

**2.1 d. Describe and prioritize needs/goals**

Facilitator guides the team in reviewing needs and adding to list. The facilitator then guides the team in prioritizing a small number of needs that family and team want to work on first, and that they feel will help the team achieve the mission. Facilitator guides team in discussing a specific goal, outcome, or indicator that will represent success in meeting each need that the team has chosen to work on.

### YOUR RESPONSES

1. An activity of this nature is:
   - 26 = essential
   - = optional
   - 1 = inadvisable

2. The description of this activity, as worded is:
   - 19 = fine
   - 5 = so-so
   - 3 = unacceptable

### Comments:

- **(inadvisable/unacceptable):** Should the child, if old enough present needs and team work with child if it can be done - why? or if it cannot be done - why not? Some times it will be possible, other times, not.
- **(essential/so-so):** For me the needs and strengths is the foundation of the planning. If a good strengths & needs discovery is not completed it will be very difficult for the team to move ahead. Often times the team members define needs as services versus basic needs (i.e. Maslow’s Hierarchy of Needs) – to have a place to live, to go to class, to feel happy, to be safe etc. By identify a need as a service the ‘creative’ process is doomed. As a coordinator this has been one of the most difficult things to get across to those I train in the field and in the classroom.
- **(essential/so-so):** Needs are a critical step in the planning process. It is essential that facilitators assist the team in identifying needs that are not services but rather are broader statements related to the underlying conditions, framed positively, that if addressed will lead to the accomplishment of the mission. This facilitates the development of action plans that include natural supports and concrete actions in addition to or in place of services offered by the systems.
- **(essential/fine):** Again with family voice being one of the values of wraparound, working on what the family views as most important seems to help the whole process work better. Some of our communities give the families weighted votes (counts as 2) on things to work on.
- **(essential/so-so):** Be sure to address how each player in the team process will agree to have their ‘treatment plan’ guided by this team process.
- **(essential/so-so):** Doesn’t reflect my experience of what works.
- **(essential/so-so):** Looking for an assessment of needs across life areas or domains (to make it comprehensive).
- **(essential/fine):** Chnaged language of item to read: “The facilitator then guides …. that **all of the team members, led by the youth family identified priorities, want to address first,**…”
- **(essential/acceptable):** Too many different things are listed, or at least I am confused about how “goals, outcomes and indicators” relate to prioritization of goals. Basically, this says that the Facilitator guides team in discussing a specific goal that will represent success in meeting each goal. Doesn’t make sense to me.
- **(essential/fine):** Stress how will we measure this.
2.1 e. Select strategies and assign action steps
Facilitator guides the team in a process to think in an open-ended manner about strategies for meeting needs and achieving outcomes. The facilitator uses techniques for generating multiple options, which are then evaluated by considering the extent to which they are likely to be effective in helping reach the goal, outcome, or indicator associated with the need; the extent to which they are community based, the extent to which they build on/incorporate strengths; and the extent to which they are consistent with family culture and values. When evaluating more formal service and support options, facilitator aids team in acquiring information about/considering the evidence base for relevant options. Team assigns responsibility for undertaking action steps associated with implementing the selected strategies within a particular time frame.
voice in strategy development is consistently incorporated into the plan. This is also the point when the incorporation of natural and community supports is initially overlooked and wraparound staff sign up for everything.
### MAJOR TASKS/Goals

#### 2.2. Develop crisis/safety plan

**GOAL:** To identify potential problems and crises, prioritize according to seriousness & likelihood of occurrence, and create an effective and well-specified crisis prevention and response plan that is consistent with the wraparound principles.

**ACTIVITIES**

#### 2.2 a. Determine and prioritize potential problems

Facilitator guides the team in a discussion of how to maintain the safety of all family members and things that could go wrong, followed by a process of prioritization based on seriousness and likelihood of occurrence.

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<tr>
<th>GOAL RESPONSES</th>
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<tr>
<td>1) An activity of this nature is:</td>
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<td>2 = essential 1 = optional 1 = inadvisable</td>
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<tr>
<td>2) The description of this activity, as worded is:</td>
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<tr>
<td>17 = fine 8 = so-so = unacceptable</td>
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**Comments:**

(didn't rate): I am not clear on what this step is.

(essential/so-so): I think you could use the term challenges instead of problems. I also like to break up crisis and safety because they are very different. I think there is a difference for identifying things that could go from and things that could happen that are more lethal in nature. System folks seem to appreciate this too. I can give you more information if you want.

(essential/so-so): This should have happened at the beginning.

(essential/so-so): Past crises are often the most important source for determining future crises for a team to plan for with a family. These are not the only risk areas but need to be considered in this step of the process, i.e. the facilitator will lead the team in evaluating past crises as well as perceived risks for this family.

(inadvisable/didn't rate #2): Do a crisis plan. This could generate a discussion that could easily get out of control.

(essential/so-so): Concerns with prioritizing risks. Every risk serious enough to be noted on a crisis plan should be given equal weight.

(essential/so-so): Added language “…safety of all family members and identify potential things that could go wrong…”

(essential/so-so): On the Crisis Plan we identify the most critical concerns. These are usually 3 to 5 priorities that must be addressed. If the crisis plan gets much larger than this the safety/crisis plan can turn into a treatment plan. Feedback from state and federal auditors have suggested to distinguish accordingly.

(essential/fine): Here the activity seems to restate the goal. Why is it listed in both places?
**ACTIVITIES**

2.2 b. Create crisis/safety plan  
In order of priority, Facilitator guides team in discussion of safety needs or concerns and potential crisis situations, including antecedents and associated strategies for preventing each potential type of crisis, as well as potential responses for each type of crisis, should it occur. Specific roles and responsibilities are created for team members.

**YOUR RESPONSES**

1) An activity of this nature is:  
   - 27 = essential  = optional  = inadvisable

2) The description of this activity, as worded is:
   - 22 = fine  5 = so-so  = unacceptable

**Comments:**

(essential/fine): Should have been one of the first things to happen.  
(essential/fine): Noting who is responsible for aspects of the plan.  
(essential/fine): Written plan needs to be created.  
(essential/fine): Are both necessary? Safety plan and Crisis Plan? Are there differences?  
(essential/so-so): Prioritization is essential in discussion of needs, however safety needs warrant a different level of response (see above comments).  
(essential/so-so): Our experiences suggest this should be 2 separate processes.  
(essential/so-so): Sentence too long and confusing. How about:  
Facilitator guides team in discussion of safety needs, concerns and potential crisis situations. Team prioritizes safety concerns. For each concern, Team generates a) antecedents, b) prevention strategies, and c) potential responses. Finally, specific roles and responsibilities are assigned to team members (didn’t rate): The interim crisis plan should be developed with the family earlier on. This plan should utilize strengths and strategies that have worked in the past. Also, phone numbers of every one on the plan and 24-hour contact plan needs to be developed. This plan should be revisited and tweaked after every crisis.  
(essential/fine): At times families develop a style of just living from one crisis to the next-with no time to look at this general pattern-I offer families my own insights here and ask if help would be useful in examining this-so that more orderly problem solving can occur.

**MAJOR TASKS/Goals**

2.3. Complete necessary documentation and logistics  

**ACTIVITIES**

2.3 a. Complete documentation and logistics  
Facilitator guides team in setting meeting schedule and finding means of contacting team members and distributing documentation to team members.

**YOUR RESPONSES**

1) An activity of this nature is:  
   - 27 = essential  = optional  = inadvisable

2) The description of this activity, as worded is:
   - 18 = fine  8 = so-so  = unacceptable

**Comments:**

(essential/so-so): I would add mechanisms and tools the facilitator uses to record meeting documentation during the meeting i.e. Chart paper, post it notes, visual and learning tools to engage team participation  
(essential/didn’t rate #2): Never, never leave a meeting without scheduling!!! You lose so much time attempting to schedule another meeting.
I would add that the meetings must be at a time and location that works for the family. Even if the family has only one vote, meeting schedule will not work for the team if it will not work for the family.

Kind of wordy.

Not all members will participate at the same level. Expectations and commitments should be clear.

May want to strengthen this section. This is an area that puts team/plans/interventions at risk when an agreed upon person is not clearly designated for communication. Maybe expand on “finding means of contacting team members”?

I love that the task stands alone and is clear! Again, this activity wording is acceptable but could be streamlined:
Facilitator guides team in setting meeting schedule, obtains contact information for each team member, and distributes documentation to each team member.

Also include the signed confidentiality forms by all team members.

---

**Phase overall:** Are there particular activities that are missing from this phase (if so please describe) or that belong in a different phase? Other comments about this phase:

- Making sure that the child and family feel that they have been heard in the process, that the needs chosen are the ones they want to work on, and that the actions chosen have a reasonable chance of helping them meet these needs. Otherwise we run the risk of substituting ritual for help.
- Overall I find the descriptions in this phase accurate and clear enough to establish a basic line of practice. I am concerned that there is not a stronger emphasis on the inclusion of supportive/non-service action plans as a key element to a successful wraparound plan. I think a facilitator could do these steps, as currently described, and generate a plan that was devoid of non-service options. This would leave out some of the powerful impact points of a well crafted wraparound planning process.
- It may work better for families to develop the crisis plan first, especially if the one initially developed has not been working successfully.
- Yes – I didn’t find anything pertaining to Life Areas or Life Domains, which seems essential in order to ensure comprehensive planning and service/support provision.
- The facilitator develops minutes from each meeting for all team members. Members discuss how the minutes should be distributed i.e. mailed or e-mailed.
- Be sure to hear the youth/child perspective and strive to include their voice in the plan. Identify what could be done differently and if training is necessary. Always include the youth/child voice. Phase 2 needs to provide the youth with a feeling that his/her voice is important to the process. This should promote the youth’s buy-in to the process.
**PHASE 3: Implementation**
During this phase, the initial wraparound plan is implemented, progress and successes are continually reviewed, and changes are made to the plan and then implemented, all while maintaining or building team cohesiveness and mutual respect. This phase continues until the team’s mission is achieved and formal wraparound is no longer needed.

**MAJOR TASKS/Goals**

3.1. Implement the wraparound plan
GOAL: To implement the initial plan of care, monitoring completion of action steps and their success in meeting need and achieving outcomes in a manner consistent with the wraparound principles

**ACTIVITIES**

3.1 a. Implement action steps for each strategy
For each strategy in the wraparound plan, team members undertake action steps for which they are responsible. Facilitator aids completion of action steps by checking in with the youth and family; following up with team members; educating providers about wraparound as needed; and obtaining necessary resources.

**YOUR RESPONSES**

1) An activity of this nature is:
   26 = essential      1 = optional       = inadvisable

2) The description of this activity, as worded is:
   21 = fine        5 = so-so         2  = unacceptable

**Comments:**

(essential/so-so): This stands out as different than the other steps. I would suggest dividing it into 2 steps: (a) team members’ tasks and (b) facilitators’ tasks.

(essential/fine): Essential to assign tasks to all team members.

(essential/so-so): The level of need for educating providers about wraparound varies obviously based on the provider but also on the community system and its history with wraparound. It might be helpful to call this out as an optional or essential step in this phase so facilitators are clear about the need to plan this based on their setting and community setting.

(essential/fine): Set time frame for evaluation of effectiveness should be added somewhere.

(essential/so-so): Suggests change to language: “...Facilitator aids completion of action steps by checking in with the youth and family; following up with team members; educating providers and other system or community representatives about wraparound as needed; and obtaining necessary resources.”

(didn’t rate #1/unacceptable): Changed language: “For each strategy in the wraparound plan, all team members undertake action steps for which they are responsible. Facilitator aids completion of action steps by checking in with the youth and family; the additional team members following up with the additional team members; educating providers about wraparound as needed; and identifying and obtaining necessary resources.

(optional/unacceptable): Are the action steps being implemented, undertaken, or completed?
### ACTIVITIES
#### 3.1 b. Track progress on action steps
Team monitors progress on the action steps for each strategy in the plan, tracking information about the timeliness of completion of responsibilities assigned to each team member, fidelity to the plan, and the completion of the requirements of any particular intervention.

#### YOUR RESPONSES
1) An activity of this nature is:
   - 28 = essential
   - 16 = optional
   - 0 = inadvisable

2) The description of this activity, as worded is:
   - 24 = fine
   - 4 = so-so
   - 0 = unacceptable

**Comments:**
- (essential/so-so) Need to be more specific about how this will happen: e.g. facilitator will call team members to monitor, tracking info will be brought to regular meetings, etc. Or include tracking procedures in first team meeting protocol, and add “as determined in the first team meeting” to this description.
- (essential/fine): Should be done in follow-up meetings.
- (essential/so-so): Might include information about evaluating why an action did not occur. Often it is because the “doer” needed additional support/information, the idea turned out to be a “bad” one, or the need was misstated or changed. This is an important team activity as it focuses on supporting team members to be able to be accountable for their commitments rather than assuming that because they committed they are able to do it.
- (essential/so-so): ‘the team’ monitoring the plan may not be realistic; is the facilitator the 'care coordinator' in this model.
- (essential/so-so): I’d list these as bullets or separate sentences to make it easier to read and follow, but the basics are there.

### ACTIVITIES
#### 3.1 c. Evaluate success of strategies
Using the outcomes/indicators associated with each need, the facilitator guides the team in evaluating whether selected strategies are helping team meet the youth’s and family’s needs.

#### YOUR RESPONSES
1) An activity of this nature is:
   - 28 = essential
   - 16 = optional
   - 0 = inadvisable

2) The description of this activity, as worded is:
   - 23 = fine
   - 5 = so-so
   - 0 = unacceptable

**Comments:**
- (essential/so-so): When and how often will this be done?
- (essential/so-so): Sometimes this confuses the process when you try to develop outcomes based on needs for needs based on outcomes….as a facilitator you may want to evaluate and bring that back to the team to review the potential inconsistencies. I found that people tend to argue the differences between the two and then you lose sight of the true need.
- (essential/fine): Should be done in follow-up meetings.
- (essential/so-so): Might include a reference that the evaluation should be focused on the impact of the action on meeting needs that ultimately connect to the mission set by the team i.e. include a focus back to the bigger picture.
- (essential/so-so): Should also include modifying the strategy based on the feedback of the team.
ACTIVITIES
3.1 d. Celebrate successes
Facilitator encourages the team to acknowledge and celebrate success, e.g. when progress has been made on action steps, when outcomes or indicators of success have been achieved, or when positive events or achievements occur.

YOUR RESPONSES
1) An activity of this nature is:
   27 = essential    1 = optional    = inadvisable
2) The description of this activity, as worded is:
   26 = fine        1 = so-so        = unacceptable

Comments:
(essential/so-so): I think as a team you need to find ways to institutionalize being strength-based at each meeting.
(essential/fine): Should be done in follow-up meetings.
(essential/fine): This is so important on a number of levels. First – so many times families come into a system that is blaming and shaming and often don’t ever experience celebration with team members. By doing this it pulls the team together, continues to instill belief in some families -that they can do it & that they do know their child the best. Sharing is an equalizer. It also promotes encouragement for professionals to continue in this process.
(essential/fine): I would include that the successes celebrated do not necessarily have to be part of the plan. When we get in the habit of naming one success each meeting, we become more strengths based in our thinking.
(essential/fine): Good to institutionalize this practice.
(essential/fine): Is encourages the team strong enough? Leads the team?
(essential/fine): Great time to show parents that these kids “success” may start very small but needs to be recognized. Same thing for family success.
(essential/fine): Changed wording of item to read: “Facilitator encourages the team to acknowledge the success of the youth, family individuallly and the team as a whole.” (generally, the youth and family are breaking cycles)
(essential/fine): Doesn’t just have to be the facilitator!

MAJOR TASKS/Goals
3.2. Revisit and update the plan
GOAL: To use a high-quality team process to ensure that wraparound plan is continually revisited and updated to respond to successes of initial strategies and need for new strategies

ACTIVITIES
3.2 a. Consider new strategies as necessary
When the team determines that strategies for meeting needs are not effective, or when new needs are prioritized for work, the facilitator guides the team in a process of considering new strategies and action steps using the process described in 2.1 e.

YOUR RESPONSES
1) An activity of this nature is:
   28 = essential    = optional    = inadvisable
2) The description of this activity, as worded is:
   26 = fine        2 = so-so        = unacceptable

Comments:
(essential/so-so): Should be done in follow-up meetings.
(essential/so-so): Suggests taking out “for work.”
(essential/fin): What about “developing” instead of “considering”? A little more action oriented.
(didn’t rate): Also review vision, strengths, team member roles, crisis plan.
### MAJOR TASKS/Goals

#### 3.3. Maintain/build team cohesiveness and trust

**GOAL:** To maintain awareness of team members' satisfaction with and “buy-in” to the process, and take steps to maintain or build team cohesiveness and trust.

#### ACTIVITIES

##### 3.3 a. Maintain awareness of team members' satisfaction and “buy-in”

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<td>1) An activity of this nature is:</td>
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<td>24 = essential 3 = optional = inadvisable</td>
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Facilitator makes use of available information (e.g. informal chats, team feedback, surveys—if available) to assess team members' satisfaction with and commitment to the team process and plan. Facilitator welcomes and orients new team members who may be added to the team as the process unfolds.

**Comments:**

- (optional/fine): I suggest providing a set of “team building / team member buy-in guidelines” as a supplement.
- (essential/fine): Should be done in conjunction with rest of team.
- (essential/fine): A feedback loop at the end of each meeting is helpful. You have people who come to the team who leave (without saying anything) not engaged. By providing a feedback loop and directly asking people if this has been helpful, does plan make sense if assists in the accountability and team development. If an individual indicates that they have none but yet do not follow through with task or complain outside a meeting the facilitator can go back to the feedback loop. This also seems to provide a quicker route to team behaviors that disrupt the team process. Accountability is a great thing!
- (essential/so-so): Important to specify roles and legal responsibilities.
- (essential/fine): Good articulation of this step.
- (optional/so-so): This could promote stronger evaluation of team member satisfaction with process than concern with family satisfaction around the entire process, intervention and outcomes.
- (essential/fine): I’d want to mention someplace that this is an ongoing activity.

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<tr>
<td>2) The description of this activity, as worded is:</td>
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<td>22 = fine 5 = so-so = unacceptable</td>
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##### 3.3 b. Address issues of team cohesiveness and trust

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<th>YOUR RESPONSES</th>
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<tr>
<td>1) An activity of this nature is:</td>
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<td>24 = essential 3 = optional = inadvisable</td>
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Making use of available information, facilitator helps team maintain cohesiveness and satisfaction (e.g. by continually educating team members—including new team members—about wraparound principles and activities, and/or by guiding team in procedures to understand and manage disagreement, conflict, or dissatisfaction).

**Comments:**

- (optional/unacceptable): Address issues of cohesiveness and trust if they arise. If ways to deal with conflict or disagreement were established in the ground rules, then this step may be unnecessary.
- (essential/so-so): Offer examples of types of available information, as in previous step.
- (essential/so-so): Frequently team cohesion issues are related to a perception by one or more team members that the central need or mission of the team’s activity is off base somehow. Team members feel the team is not addressing the real issues. The facilitator’s task set includes assessing the accuracy of
Phases and activities—p.24
the team’s work in targeting the reason the family became involved in the public care system in the first place. This either needs to be included in this step/phase or called out as a separate facilitation task.
(essential/so-so): Is the facilitator the care coordinator?
(essential/fine): Good articulation of the facilitator role.
(essential/fine): I’d like to see the curriculum guide for this skill (and others!)
(essential/so-so): These 2 steps (3.3a, 3.3b) are essential but part of the point is to strengthen the team of natural supports to help the families after formal wraparound ends.
(essential/so-so): Give facilitators examples of activities.
(essential/fine): Particularly in the realm of changing priorities which for some is difficult to manage or accept.

<table>
<thead>
<tr>
<th>MAJOR TASKS/Goals</th>
<th>3.4. Complete necessary documentation and logistics</th>
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<tbody>
<tr>
<td>ACTIVITIES</td>
<td>3.4 a. Complete documentation and logistics</td>
</tr>
<tr>
<td></td>
<td>Facilitator maintains and distributes meeting minutes that describe completion of action steps, team attendance, use of formal and informal services and supports, and expenditures. Facilitator documents results of reviews of progress/successes, and changes to the team and plan. Facilitator guides team in revising meeting logistics as necessary and distributes documentation to team members.</td>
</tr>
</tbody>
</table>
| YOUR RESPONSES    | 1) An activity of this nature is:  
|                   | 26 = essential       = optional       = inadvisable |
|                   | 2) The description of this activity, as worded is:  
|                   | 23 = fine          2 = so-so          = unacceptable |

Comments:
(essential/so-so): Minutes are fine but should be an action plan which is laid out – names corresponding with tasks that they have taken on and dates of completion is very helpful. It takes time to review minutes but if you have a plan attached you can look and know who is doing what.
(essential/fine): I appreciate the inclusion of formal and informal services and supports language here when I felt it was missing in some earlier steps.
(essential/fine): Just be consistent with 2.3. It’s a bit overdone here.
(didn’t rate): Also always review the crisis plan.
**Phase overall:** Are there particular activities that are missing from this phase (if so please describe) or that belong in a different phase? Other comments about this phase:

- When there are multiple plans in operation (in most places wraparound isn’t the only game running) or when there is an open court case, the facilitator has to also pay attention to the other plans and keep what the team is doing in sync with these other efforts. This is also the case when a provider, even one selected through the wraparound process, has its own planning and service implementation process. This could be a residential treatment center, a treatment foster home, an intensive in-home program, or an individual therapist.
- Overall this phase seems complete and specific in its descriptions. Consider adaptation mentioned in the comment in 3.3.b
- Continuous feedback such as updates on the CAFAS scores from month to month. I mention CAFAS because clinicians report it to be a relatively easy instrument to use and to understand the results.
- This description seems to ignore the need for a care coordinator to follow up on the team's plan. If this model assumes a facilitator and a care coordinator; this is often not realistic given funding constraints. I recommend integrating language into this description that either assumes the facilitator is the care coordinator or a step or statement in assigning roles to assure that there is a primary care coordinator assigned during the wrap team meeting.
- The facilitator works with the parent to transfer facilitation skills to the parent so that parents are able to run their own child and family team meetings.
- Don’t like strategy, prefer option.
- Should include that the facilitator should continually look for opportunities to build the team with a focus on informal supports.
- Whenever possible I would suggest giving facilitators concrete examples of activities—Our facilitators have various degrees of education and insight.
PHASE 4: Transition

During this phase, plans are made for a purposeful transition out of formal wraparound to a mix of formal and natural supports in the community (and, if appropriate, to services and supports in the adult system). The focus on transition is continual during the wraparound process, and the preparation for transition is apparent even during the initial engagement activities.

MAJOR TASKS/Goals

4.1. Plan for cessation of formal wraparound

GOAL: To plan a purposeful transition out of formal wraparound in a way that is consistent with the wraparound principles, and that supports the youth and family in maintaining the positive outcomes achieved in the wraparound process.

ACTIVITIES

4.1 a. Create a transition plan

Facilitator guides the team in focusing on the transition from wraparound, reviewing strengths and needs and identifying services and supports to meet needs that will persist past formal wraparound.

YOUR RESPONSES

1) An activity of this nature is:
   26 = essential       = optional       = inadvisable

2) The description of this activity, as worded is:
   20 = fine         4 = so-so         1 = unacceptable

Comments:

(essential/fine): Should be addressed all along.
(didn’t rate): This is difficult for me – until our funding streams become more flexible I am unsure how transitioning will work. In my state I work with many families where they are able to do the facilitation – what becomes difficult is monies are tied to agencies thus have to have a representative. I think that this area needs to be explored in great detail. I do believe in informal support and think it is amazing what can occur. Unless our funding streams become flexible in regards to what they can be spent to we use categorical services because they are there versus being able to creatively come up with supports based on strengths an needs. At this time I feel that it is a set up to parents. I am currently working with a youth who has been in in and out of placements for five years. We had a solid enough team to challenge the state and get funding in order to step him down to home with support around the clock – eventually this will be eased out but with his needs it takes a long transition and reinforcement. Every time he left ‘treatment’ her would return with in a matter of months. The family is thrilled that they ‘are getting their son back’ – this should have been done years ago but the funding streams would not allow it. A wonderful study done by clasp takes a look at federal funding – the conclusion was that it was not the federal guidelines that interfered with flexible spending but state. I think further work needs to be done here – but I am not sure how.
Also, I have seen more than a few teams disintegrate after a skilled coordinator leaves even if the team members were very strong.

(essential/so-so): This step and phase should start early enough in the life of the team that plans for preparing for transition should be reflected in the language for this step.
(essential/didn’t rate #2): It is important to distinguish the transition from formal to informal supports -- recognizing that formal supports are often needed for youth with SED.
(essential/unacceptable): Incomplete.
(essential/so-so): Many families can feel abandoned from going from a lot of support to none- Speak frankly about fears about transition-give" coins" to be used to make follow up calls-begin to stagger meetings.
(essential/so-so): “Aging out” should be emphasized. Too often the team does not address transition to young adulthood within the context of developing emotional and social skills for a healthy and better quality of life.
ACTIVITIES
4.1 b. Create a post-transition crisis plan
Facilitator guides the team in creating post-wraparound crisis or safety plan, including action steps, specific responsibilities, and communication protocols. Crisis/safety planning may include rehearsing responses to crises and creating linkage to post-wraparound crisis resources.

YOUR RESPONSES
1) An activity of this nature is:
   26 = essential   1 = optional   = inadvisable

2) The description of this activity, as worded is:
   23 = fine   3 = so-so   = unacceptable

Comments:
(essential/so-so): I prefer Crisis management planning vs. post wraparound crisis plan because at this point they should know the safety drill, practiced it or had crisis interventions that have built their skills up and this acknowledges their growth and helps to reinforce their support systems.
(essential/didn’t rate #2): Again – I struggle with the transition process here.
(essential/fine): Our communities generally let the families know that they can come back for a “mini-wrap” if they need to after they have successfully completed the process.
(essential/so-so): Identify access and entitlements for formal MH services concurrent with and following the wraparound process.
(essential/so-so): Confuse crisis and safety.

ACTIVITIES
4.1 c. Modify wraparound process to reflect transition
New members are added to the team to reflect identified post-transition strategies, services, and supports. The team discusses responses to potential future situations, including crises, and negotiates the nature of each team member’s post-wraparound participation with the team/family. Formal wraparound team meetings reduce frequency and ultimately cease.

YOUR RESPONSES
1) An activity of this nature is:
   14 = essential   1 = optional   = inadvisable

2) The description of this activity, as worded is:
   13 = fine   1 = so-so   1 = unacceptable

* Low voting on this item may be due to the original copy not having the voting option in the cell.

Comments:
(didn’t rate): Should be planned for, all along
(essential/unacceptable): There is still a persistent fantasy and minority reality that some teams continue after formal wraparound, or more accurately put, system involvement in the family’s wraparound team ceases. The final line in this description seems to assume that all team activity cease when the systems withdraw. While frequently true this is not the only or desired option.
(didn’t rate): As above, be sure to identify the formal supports that may or may not be available (i.e. medicaid funded services vs. private insurance).
(didn’t rate): Follow up reporting/interviews scheduled.
MAJOR TASKS/Goals
4.2. Conduct commencement ceremonies
GOAL: To ensure that the cessation of formal wraparound is conducted in a way that celebrates successes and frames transition proactively and positively

ACTIVITIES
4.2 a. Document the team’s work
Facilitator guides team in creating a document that describes the strengths of the family and team members, and the success/failure of strategies used.

YOUR RESPONSES
1) An activity of this nature is:
   23 = essential  4 = optional  = inadvisable

2) The description of this activity, as worded is:
   23 = fine  2 = so-so  1 = unacceptable

Comments:
(essential/unacceptable): I don’t like to use the term failure…what works and what didn’t gets at the same thing…failure could or has historically implies that someone did something wrong and it may be that timing was off and it just didn’t match the culture of this family.
(essential/so-so): I’d prefer another word for failure – lessons learned – challenges – things that didn’t help.
(essential/fine): You need this information in a package that can be used – excellent.
(essential/fine): I would also include in the success/failure of strategies used part, an analysis of what worked consistently, well, etc. and what didn’t.
(essential/fine): Changed item language to read: “Facilitator guides team in creating a document that describes the strengths of the youth, family and team members, ....”

ACTIVITIES
4.2 b. Celebrate success
Facilitator encourages team to create an individualized, culturally appropriate “commencement” celebration that recognizes the team’s and family’s accomplishments.

YOUR RESPONSES
1) An activity of this nature is:
   17 = essential  7 = optional  = inadvisable

2) The description of this activity, as worded is:
   20 = fine  3 = so-so  = unacceptable

Comments:
(essential/so-so): Celebrations have to be matched with the context. Don’t have a graduation party for someone who has to go back for another year of classes.
(essential/fine): Our communities have periodic “Graduations” that may not be particularly individualized, but are very important to the families.
(optional/fine): Great idea. Tough with the paperwork load my team has.
(optional/so-so): Many families aren’t ready to graduate. Make sure this isn’t a way to just get the family out of the system! Family needs to know that team can be called back if things change.
**MAJOR TASKS/Goals**

4.3. Follow-up with the family  
GOAL: To ensure that the family is continuing to experience success post-wraparound and to provide support if necessary

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<tr>
<th>ACTIVITIES</th>
<th>YOUR RESPONSES</th>
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| 4.3 a. Check in with family | 1) An activity of this nature is:  
Facilitator leads team in creating a procedure for checking in with the family on a monthly basis for 6 months after commencement. If new needs have emerged that require a formal response, facilitator and/or other team members may aid the family in accessing appropriate services, possibly including a reconvening of the wraparound team.  
| 20 | essential | 4 | optional | = inadvisable |
| 20 | essential | 4 | optional | = inadvisable |

**Comments:**

(essential/so-so): And again at 12 months.
(essential/so-so): The issue is post wraparound support. This description assumes that it is appropriate for every family to be contacted, rather than do the contacting. Another issue is follow up/tune-up activities. The team can/should arrange for the steps a family can follow to reconvene the team for short term additional support or checking in. The overall description here seem to vacate the family voice and tailored response element of successful wraparound transition.
(essential/fine): I think that it should be longer than six months, more like a year or two as long as it’s not distressing the family.
(essential/so-so): Need to address how this is ‘funded’ or supported.
(essential/fine): Critical!!!!
(optional/fine): This is important practice, but 6 months may be too long to wait for a check in. May be better to ensure that the family knows how to contact the facilitator (or provider, etc.) at any time, should things begin to get “off track”. In addition to that, a check in call is fine at 6 months.
(essential/so-so): Follow-up is good. 6 months is arbitrary.
(optional/fine): We have used very brief check in questionnaires more frequently after sometimes after each CFT mtg that have given simple and quick feedback to the facilitator.
**Phase overall:** Are there particular activities that are missing from this phase (if so please describe) or that belong in a different phase? Other comments about this phase:

- I think you should add some language about scaling the overall outcomes at least every other month or every month to determine progress and other needs. On a scale from one to ten if the family is not moving then the strategies may need to be changed or modified. We use the scaling method a lot in Michigan and it has seemed to help families, teams and community teams concretely look at progress and needs and be more solution-focused. The other thing I would add is that facilitation should gradually be transferred to family members or natural supports.

- Closure reports from subsidiary providers should be incorporated in the final summary. Where the court was or remains involved, a report specifically formulated to address the court’s concerns and focus should be prepared and submitted.

- This phase is accurately described with adequate detail for the purpose if the activity. It includes the only step I marked as optional, “commencements”. I guess I am not enough of a party lover.

- I would add something to deal with fears the family members might have in ending wraparound which is why our communities generally let the families know that they can come back for a “mini-wrap” if they need to after they have successfully completed the process.

- Connect family with a community parent support group.

- Too much celebrating? Smaller, more frequent positive reinforcement might be better.

- “Purposeful transition” – is about all transitions, not just out of services. This phase is way too limited.

- Upon a youth and family successfully graduating, they could serve as team members of other wrap teams or as mentors to new youth and families.
Comments on the four phases as a whole?

- I think this is a lot closer to where we are right now with wraparound than previous versions. I know this is quite a job so I tried to keep my comments to a minimum. Thanks for your hard work.

- Being involved in a wraparound was a new experience. Somewhere along the way our TEAM fell apart. It seemed as though crisis demanded immediate actions. We did not have that "no matter what it takes vision" to keep the child in the community. It really is a TEAM effort, but everyone has to be on board and support the vision. Do we really mean, "no matter what it takes". It’s seems to be so easy to fall back on the same old answers to why something can’t be done. "Now, we’re at a different level and I’m hoping that I’ve gained a little more knowledge to help keep a TEAM together - and have people on board who shares the vision of "no matter what it takes." Overall this looks like a good document - but it looks like it will take much work, and commitment, thinking of the plans that have to be put in place and worked.

- (didn’t rate any items): These tasks are always sent without any identification of who developed them. Why aren’t you regularly sharing who the authors are? This is way way too clumsy to be useful. It overly simplifies that which is complex, and makes complex ad minuita that which can be much more clear and simple.I suggest a thorough review of how Henggeller presents MST. There is over a decade of excellent research on how they identified the theory base and basis for interventions in MST, as well as how they train, supervise and write manuals as well as measure for model fidelity. Ignoring this, especially when MST shares a theory base with wraparound seems self-defeating.

- I think this is the closest thing we have to describing how all this is supposed to work. I hope someone is able to do it. What we don’t talk about is creating a community and organizational context that allows this work to take place. We also don’t talk about how this would be adapted to different situations. We also don’t deal with conflict management when major rifts occur, whether involving family members or system folks.

- You guys are doing such good work all I can say is THANKS!!!

- The description of these four phases is helpful and seems to have enough detail to be helpful to others in expressing and clarifying the facilitation task set and activities. Looking back at the implementation phase in the context of the whole set there might be a stronger emphasis on assuring flexible response to families through the adaptation of the plan steps.

- Generally excellent. Wording may be a little clinical for family members, but I found myself slipping right into it as I was reading it. I was also concerned that Family Support Partners/Family Advocates were not mentioned. I think that is what makes this work. I think that the family voice is essential to the process and that some interpretation may be needed to enhance communication between team members. Family Support Partners can and do significantly impact the process positively.

- Good descriptions of wraparound process 'in isolation'; but needs to address how wraparound is provided 'in context' to the larger 'system of care'. (examples: who is the designated care coordinator? Who funds care coordination? How is wraparound facilitation supported? What is the role of formal mental health assessment and treatment? What is the role of other formal systems? Ie. Child welfare or juvenile court --- have they given 'authority to the wraparound team. The description of child welfare 'standing in' for the parent needs to be more clearly described -- i.e. when an agency is provided 'temporary custody' the legal parent's rights have not been terminated and the family should be included in the wraparound team (I recognize this is complex). My comments are 'slanted' towards integrating the description of the 'wrap process' into the system of care -- because I have seen communities struggle with sustaining this approach -- often it is a 'grant related' activity that does not sustain without funding and support from the 'formal system'.

- If we had a perfect world, this is how it would be. This is very good and detail. It’s a good roadmap.

- This looks very complete. The only area I continue to be concerned about is around the need for the team to make a commitment to the family regarding unconditional care. When complex needs and multiple systems are involved, that commitment seems particularly essential. Without clarity
around this issue, it is all too easy to slide down the slippery slope of “conditional” care. Other than that, I am very impressed with how this is coming together. Thank you so much for all the work you’re doing.

- I do think we should assist parents as part of the process to become facilitators so that they can reconvene CFTs after graduation if they need to.
- I’m having trouble understanding how the tasks differ from the goals, and why they are written separately.
- Youth, regardless of age should be as involved as they want to be in the planning process, even at 7, they know who is a support to them and what will help. Youth should always guide the way.
- I think the stages are clear and well written, as I have stated I think we need to offer facilitators clear examples of activities (do’s and don’ts) I would also focus more on how facilitators work with culture- Sometimes they tend to stereotype families according to race- or do not take into consideration different types of “Culture” like the culture of substance abuse, culture of poverty and the culture that arises as a family has to change to accommodate a child with challenges. Overall really nice job.