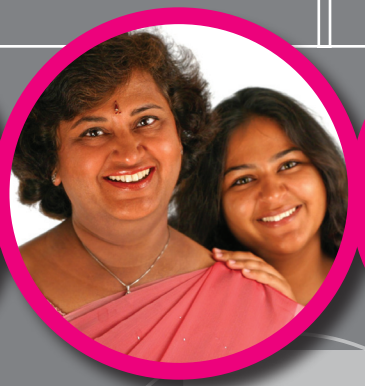
how family partners contribute to the phases and activities of the wraparound process

PHASE



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Wraparound Practice: Chapter 4b.2

How Family Partners Contribute to the Phases and Activities of the Wraparound Process

See page 4 for proper viewing instructions

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Fidelity to the wraparound process requires effort on the part of the team and its individual members to intentionally engage families in all phases and activities in a manner that is consistent with the principles of wraparound. T*he Application of the Ten Principles of the Wraparound Process to the Role of Family Partners on Wraparound Teams* (Penn & Osher, 2007) briefly described what the Family Partner does on wraparound teams to put each of the ten principles of the wraparound process into practice. This document explains in detail what the Family Partner does during each phase of the process to support the family's engagement in key activities. It also describes how the Family Partner's work complements that of the Wraparound Facilitator and how the Family Partner works in partnership with other members of the team. Examples given of practices are intended to be illustrative as individual family and community contexts vary and wraparound planning is unique for each child and family.

Completion and publication of this document fulfills one of the major goals of the Family Partner Task Force of the National Wraparound Initiative. The Task Force is a diverse group of more than 50 family members, youth, practitioners, advocates, administrators, policy makers and others committed to promoting high fidelity wraparound and developing resources and tools to facilitate its implementation.

The Task Force uses the National Wraparound Initiative's Participatory Community of Practice model to develop tools and materials to support family partners and the organizations they work for in the field. All members of the Task-

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Force had the opportunity to contribute to this document at every stage of development which included three rounds of feedback (two from the Task Force and one from the entire group of National Wraparound Initiative advisors) using web-based surveys. Trina Osher and Marlene Penn, co-chairs of the Task Force, were responsible for writing this document. April Sather's assistance with gathering and compiling the multiple rounds of feedback was invaluable. Many individuals looked at various drafts and the following made significant contributions to the work either by providing content or making comments: Angela Igrisan, Art Navalta, Barbara Kern, Carol LaForce, Claudette Fette, Denise Baker, Dennis Grannis-Phoenix, Heather Woldemar, Hillary Gaines, Jeff Guenzel, Jennifer Mettrick, Kathleen Screen, Lyn Farr, Madge P Mosby, Pamela Marshall, Rosalyn M. Bertram, Sharon Madsen, Sue Smith, Jeanette Barnes, Lynette Tolliver, Mary Ellen Collins, Twila Yingling, Carolyn Cox, Susan Boehrer, and Alice Preble.

Definition of Family Partner

The Family Partner is a family member who is a formal member of the wraparound team. The family partner's role is to serve the family, help them engage and actively participate on the team, and make informed decisions that drive the process.

Family Partners have a strong connection to the community and are very knowledgeable about resources, services, and supports for families. The Family Partner's personal experience raising a child with emotional, behavioral, or mental health needs is critical to earning the respect of families and establishing a trusting relationship that is valued by the family.

The Family Partner can be a mediator, facilitator, or bridge between families and agencies. Family Partners ensure each family is heard and their individual needs are being addressed and met. The Family Partner should communicate and educate agency staff on wraparound principles, the importance of family voice and choice, and other key aspects of ensuring wraparound fidelity. The family partner works in close partnership with the wraparound facilitator.

VIEWING INSTRUCTIONS

Proper viewing of this document is essential to understanding the role of the family partner in the context of the phases and activities of the wraparound process. When viewed as intended, the reader should see a table explaining the phases of the wraparound process on the left page, and the family partner role in that phase on the right page. To achieve this view in Adobe Acrobat, choose View > Page Display > Two-Up. When viewing a printed copy, make sure the odd page is on the left and the even page is on the right (if printing on both sides, begin printing with page 2 and print page 1 separately).

Family Partner Role in the Wraparound Process: Phase 1

*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. During this phase, the tone is set for teamwork and team interactions that are consistent with the wraparound principles, particularly through the initial conversations about strengths, needs, and culture. In addition, this phase provides an opportunity to begin to shift the family's orientation to one in which they understand they are an integral part of the process and their preferences are prioritized. The activities of this phase should be completed relatively quickly (within 1-2 weeks if possible), so that the team can begin meeting and establish ownership of the process as quickly as possible.

MAJOR GOALS	ACTIVITIES	NOTES
1.1. Orient the family and youth GOAL: To orient the family and youth to the wraparound process.	*1.1 a. Orient the family and youth to wraparound* In face-to-face conversations, the facilitator explains the wraparound philosophy and process to family members and describes who will be involved and the nature of family and youth/child participation. Facilitator answers questions and addresses concerns. Facilitator describes alternatives to wraparound and asks family and youth if they choose to participate in wraparound. Facilitator describes types of supports available to family and youth as they participate on teams (e.g., family/youth may want coaching so they can feel more comfortable and/or effective in partnering with other team members).	This orientation to wraparound should be brief and clear, and should avoid the use of jargon, so as not to overwhelm family members. At this stage, the focus is on providing enough information so that the family and youth can make an informed choice regarding participation in the wraparound process. For some families, alternatives to wraparound may be very limited and/or non-participation in wraparound may bring negative consequences (as when wraparound is court ordered); however, this does not prevent families/youth from making an informed choice to participate based on knowledge of the alternatives and/or the consequences of non-participation.
	1.1 b. Address legal and ethical issues Facilitator reviews all consent and release forms with the family and youth, answers questions, and explains options and their consequences. Facilitator discusses relevant legal and ethical issues (e.g., mandatory reporting), informs family of their rights, and obtains necessary consents and release forms before the first team meeting.	Ethical and legal considerations will also need to be reviewed with the entire team as described in phase 2.

** Wraparound phases defined in: Walker, J. S., Bruns, E. J., & the National Wraparound Initiative Advisory Group. (2008). Phases and activities of the wraparound process. In E. J. Bruns & J. S. Walker (Eds.), *The resource guide to wraparound*. Portland, OR: National Wraparound Initiative.

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Family Partner Role in the Wraparound Process: Phase 1 (CONTINTUED)

PHASE 1: The family partner role

The family partner has a collaborative relationship with the wraparound facilitator. Together they establish mechanisms to keep each other informed, make sure the family partner knows when new families are enrolled as well as when and where team meetings will occur, and insure all newly enrolled families have the opportunity to have support from a family partner if they choose.

HOW FAMILY PARTNERS SUPPORT THE PROCESS

1.1 a. Orient the family and youth to wraparound

The family partner helps the family understand wraparound as an opportunity to get what they need and to also feel comfortable with getting engaged in the wraparound process. The family partner listens without bias, blame, or judgment in their approach. The family partner encourages and models commitment, demonstrates respect for the family's culture, builds trust with the family, and eases their fears. This is an interpersonal process. The family partner gets to know the family by meeting with family members (sometimes with the wraparound facilitator) in locations in which and at times that the family feels comfortable. The family partner explains wraparound from a family perspective, including the role of the family partner, sharing selected personal experiences as examples when relevant and appropriate. Together they explore the extent to which the family feels comfortable supporting and advocating for their child and family and how much coaching and support they will want from a family partner. The family partner gives the family helpful written materials such as family organization newsletters and brochures and materials about wraparound such as a copy of The Wraparound Process User's Guide: A Handbook for Families. The family partner reviews the guide or other informative materials with them and answers questions about what a wraparound team is and how it is created and functions. The family partner invites the family to support groups and other organized family activities in the community and encourages them to attend.

The family partner explains the limits of their own role including any time limits imposed by the program or system in which they are working. The family partner explains that they will not reveal any information the family wants to keep confidential except in cases where the safety of family members is involved.

Once the family has agreed to participate, the family partner can offer to help the family identify and organize various documents and information they will need to support and advocate for their child. This information placed in a binder, box or folder can be updated as new materials are accumulated through the wraparound process.

1.1 b. Address legal and ethical issues

The family partner explains informed consent from a family point of view. The family partner discusses system mandates with the family and helps them understand what they might expect in court proceedings.

The family partner can help them prepare for court appearances and, when invited, may attend to provide support to the family.

The family partner discusses any evaluation, data collection, or research activities associated with the wraparound initiative including how the family's participation might benefit them or others. The family partner makes sure the family understands how data will be collected and what steps will be taken to insure their personal identities are protected.

The family partner addresses the sensitive issue of mandated child abuse reporting by explaining their duty as a mandatory reporter of child abuse or neglect and what that means from a family's perspective.

Family Partner Role in the Wraparound Process: Phase 1 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
1.2. Stabilize crises GOAL: To address pressing needs and concerns so that the family and team can give their attention to the wraparound process.	*1.2 a. Ask family and youth about immediate crisis concerns* Facilitator elicits information from the family and youth 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, utilities such as heat or electricity).	The goal of this activity is to quickly address the most pressing concerns. The whole team engages in proactive and future-oriented crisis/safety planning during phase 2. As with other activities in this phase, the goal is to do no more than necessary prior to convening the team, so that the facilitator does not come to be viewed as the primary service provider and so that team as a whole can feel ownership for the plan and the process.
	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.	Information about previous crises and their resolution can be useful in planning a response in 1.2.c.
	1.2 c. If immediate response is necessary, formulate a response for immediate intervention and/or 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.	This response should describe clear, specific steps to accomplish stabilization.
1.3. Facilitate conversations with family and youth/child GOAL: To explore individual and family strengths, needs, culture, and vision and to use these to develop a document that will serve as the starting point for planning.	*1.3 a. Explore strengths, needs, culture, and vision with child/youth and family.* Facilitator meets with the youth/child and family to hear about their experiences; gather their perspective on their individual and collective 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).	This activity is used to develop information that will be presented to and augmented by the team in phase 2. Family members should be encouraged to consider these topics broadly.

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Family Partner Role in the Wraparound Process: Phase 1 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

1.2 a. Ask family and youth about immediate crisis concerns

The family partner participates in discussions regarding stabilization of immediate concerns to ensure that the plan is individualized and realistic for the family. The family partner is someone the family can talk with to validate how they might be feeling at the time. The family partner can help define the nature of the family's immediate concerns by listening carefully and encouraging the family to speak frankly. The family partner can ask about the signs that a crisis is likely to occur and learn what has been done by the family before so that strategies that have worked are included in the plan and those that have failed in the past are not repeated. Family partners help families identify reasonable alternatives, possible natural supports, and share what they know about resources in their communities that may give respite, food, shelter, clothing, and other necessities to help the family stabilize. Family partners offer hope and can have a calming effect and decrease the family's anxiety and fears of the unknown, when necessary, by sharing how they survived stressful experiences.

1.2 b. Elicit information from agency representatives and potential team members about immediate crises or potential crises

The family partner helps the family define crisis or safety concerns from their own experiences and clarifies for the family how other team members may view potential crisis concerns including events that could trigger a report for abuse or neglect. The family partner also helps communicate the family's perspective regarding potential crisis to the team members. The family partner encourages family members to identify both the formal and natural supports that have worked well to resolve crisis in the past and to look at what it would take to mend bridges of past natural supports.

1.2 c. If immediate response is necessary, formulate a response for immediate intervention and/or stabilization

The family partner will make sure the family feels the planned response for immediate intervention and/or stabilization can be readily implemented when it is needed. The family partner assists the family in expressing any concerns they might have about the immediate intervention and/or crisis stabilization plan.

1.3 a. Explore strengths, needs, culture, and vision with child/youth and family.

Consistent with the principle of family voice and choice, the family partner begins to prepare the family for effective self-advocacy by helping them to comfortably participate in this conversation. As a peer, in down-to-earth and heartfelt conversations, the family partner helps the family begin to think through their strengths, needs, culture, and vision so they are ready to contribute useful and valuable information that drives the process. The family partner also helps the family find ways to talk about sensitive issues, reframe negative concerns, and manage their emotions so the conversation remains respectful.

The family can plan and write their presentation and practice or "role play" with their family partner to develop their confidence and communicate clearly.

At times, the family partner may need to help the adult family members recognize when their child's behaviors and reactions are typical for their age and help the family allow their child to express their own views during the wraparound process. The family partner asks the family if they need or want support with school issues, court issues, and physical or mental health appointments. When relevant the family partner provides the family with information about their rights in the education, mental health, and other systems and connects them to expert advisers as needed.

The family partner attends to language and attitudes of all team members to promote family friendliness and avoid blaming and shaming the family or anyone else on the team.

Family Partner Role in the Wraparound Process: Phase 1 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
1.3. Facilitate conversations with family and youth/child GOAL: To explore individual and family strengths, needs, culture, and vision and to use these to develop a document that will serve as the starting point for planning. *(Continued from previous page)*	*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 individual family member strengths and strengths of the family unit, as well as needs, culture, and vision. The family then reviews and approves the summary.	
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	*1.4 a. Solicit participation/ orient team members* Facilitator, together with family members if they so choose, approaches potential team members identified by the youth and family. Facilitator describes the wraparound process and clarifies the potential role and responsibilities of this person on the team. Facilitator asks the potential team members if they will participate. If so, facilitator 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.	The youth and/or family may choose to invite potential team members themselves and/or to participate in this activity alongside the facilitator. It is important, however, not to burden family members by establishing (even inadvertently) the expectation that they will be primarily responsible for recruiting and orienting team members.
1.5. Make necessary meeting arrangements GOAL: To ensure that the necessary procedures are undertaken for the team is prepared to begin an effective wraparound process.	*1.5 a. Arrange meeting logistics* 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 accessible and comfortable, especially for the family but also for other team members. Facilitator prepares materials—including the document summarizing family members' individual and collective strengths, and their needs, culture, and vision—to be distributed to team members.	

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Family Partner Role in the Wraparound Process: Phase 1 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

1.3 b. Facilitator prepares a summary document

The family partner works with the facilitator to summarize the strengths, needs, culture and vision of the family unit and individual family members.

The family partner reviews the document with the family to make sure the family completely understands the document and that it really reflects their view of themselves, their strengths and the challenges they face.

1.4 a. Solicit participation/orient team members

The family partner, by spending time with the family and in the family's own home and community, becomes aware of individuals who could be members of the family's wraparound team including those who might provide support even though they cannot be physically present. Through frank discussions about the strengths and gifts of potential team members as well as any risks associated with their involvement, the family partner helps the family decide who they would like on their team.

The family could ask the family partner to help them invite some individuals to be on their team and explain to them what their responsibilities would be.

The family partner acts as a role model by educating system representatives on wraparound's principle of family voice and choice and helping them apply this principle to their work on the team in the context of their agency's mandates.

The family partner acts as a bridge builder encouraging understanding and collaboration between the family, and their team members.

1.5 a. Arrange meeting logistics

The family partner collaborates with the facilitator and the family to make sure that all meetings are held in places and at times comfortable and convenient for the family.

The family partner, in collaboration with the facilitator and family, may send out meeting notices and reminders, and, when necessary, identifies the need for travel, childcare, translators, or other supports for participants.

Before the meeting, the family partner works with the facilitator and family to create an agenda and consider what refreshments might be required and how to get them.

Family Partner Role in the Wraparound Process: Phase 2

*PHASE 2: Initial plan development***

During this phase, team trust and mutual respect are built while the team creates an initial plan of care using a high-quality planning process that reflects the wraparound principles. In particular, youth and family should feel, during this phase, that they are heard, that the needs chosen are ones they want to work on, and that the options chosen have a reasonable chance of helping them meet these needs. 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 GOALS	ACTIVITIES	NOTES
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	*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 legal and ethical issues—including confidentiality, mandatory reporting, and other legal requirements—and how to create a safe and blame-free environment for youth/family and all team members. Ground rules are recorded in team documentation and distributed to members.	In this activity, the team members define their collective expectations for team interaction and collaboration. These expectations, as written into the ground rules, should reflect the principles of wraparound. For example, the principles stress that interactions should promote family and youth voice and choice and should reflect a strengths orientation. The principles also stress that important decisions are made within the team.
	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.	While strengths are highlighted during this activity, the wraparound process features a strengths orientation throughout.
	2.1 c. Create team mission Facilitator reviews youth and family's vision and leads team in setting a team mission, introducing idea that this is the overarching goal that will guide the team through phases and, ultimately, through transition from formal wraparound.	The team mission is the collaboratively set, long-term goal that provides a one or two sentence summary of what the team is working towards.

** Wraparound phases defined in: Walker, J. S., Bruns, E. J., & the National Wraparound Initiative Advisory Group. (2008). Phases and activities of the wraparound process. In E. J. Bruns & J. S. Walker (Eds.), *The resource guide to wraparound*. Portland, OR: National Wraparound Initiative.

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Family Partner Role in the Wraparound Process: Phase 2 (CONTINTUED)

PHASE 2: The family partner role

The family partner collaborates with the wrap facilitator to establish the trust and mutual respect necessary for the team (including the family) to function.

HOW FAMILY PARTNERS SUPPORT THE PROCESS

2.1 a. Determine ground rules

With permission from the family, the family partner attends the initial care planning meeting. Before the meeting, the family partner should have a discussion with the family about where they would like the family partner to sit (next to, across from) to offer the best means of communication and support that feels comfortable for the family.

The family partner offers support to the family by encouraging family member to:

- Participate in constructing the ground rules so that they are relevant and individualized;
- Express strengths, visions, and needs;
- Describe the family's cultural, spiritual, and moral beliefs;
- Contribute to the development of strategies they feel are realistic; and
- Speak up and say "no" when suggestions are made that they do not agree with.

The family partner makes sure the family's perspective is visible and heard by asking questions of the family to be sure they are comfortable with the plan as it evolves.

The family partner encourages the meeting facilitator to use visual tools (such as chart paper, colored markers, stickers, etc.) so that family members can see the language of the plan as it develops.

The family partner helps other team members understand and feel comfortable with the principle of family voice and choice.

The family partner agrees to take responsibility for follow up tasks that are compatible with their role description and expectations.

By sharing their own experience (relevant self-disclosure) family partners help the team gain some insight into the family's situation so they can think "outside the box" and be creative in developing a practical plan. The family partner helps the family decide if the plan is likely to be workable for them. They do this by asking them questions like:

- "Is the plan flexible enough to meet your changing needs?"
- "Does the plan incorporate the natural supports you need?"
- "Do you feel your voice has been heard?"
- "Does the plan incorporate the formal and clinical services you need?"
- "Is the financing of services and supports realistic?"

2.1 b. Describe and document strengths

The family partner explains why strengths are important and how to recognize them. The family partner may describe a personal experience to illustrate the value of being strengths-based.

Drawing on prior discussion with the family, the family partner works with the family to see how their strengths and team and community strengths can be used to help address their needs with the goal of assuring natural supports are developed and used to sustain the family goal.

2.1 c. Create team mission

The family partner helps the family express changes in their vision of the future to their team. The family partner makes sure that the team mission incorporates the family's and the youth's perspectives, abilities, and preferences.

The family partner makes sure the family understands that their wraparound team's mission may need to be revised as changes occur in their child and family.

Family Partner Role in the Wraparound Process: Phase 2 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
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 *(Continued from previous page)*	*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 the youth, family, and team want to work on first, and that they feel will help the team achieve the mission.	The elicitation and prioritization of needs is often viewed as one of the most crucial and difficult activities of the wraparound process. The team must ensure that needs are considered broadly, and that the prioritization of needs reflects youth and family views about what is most important. Needs are not services but rather broader statements related to the underlying conditions that, if addressed, will lead to the accomplishment of the mission.
	2.1 e. Determine goals and associated outcomes and indicators for each goal Facilitator guides team in discussing a specific goal or outcome that will represent success in meeting each need that the team has chosen to work on. Facilitator guides the team in deciding how the outcome will be assessed, including specific indicators and how frequently they will be measured.	Depending on the need being considered, multiple goals or outcomes may be determined. Similarly, for each goal or outcome determined by the team for measurement, multiple indicators may be chosen to be tracked by the team. However, the plan should not include so many goals, outcomes, or indicators that team members become overwhelmed or tracking of progress becomes difficult.
	2.1 f. Select strategies Facilitator guides the team in a process to think in a creative and 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 and /or considering the evidence base for relevant options.	This activity emphasizes creative problem solving, usually through brainstorming or other techniques, with the team considering the full range of available resources as they come up with strategies to meet needs and achieve outcomes. Importantly, this includes generating strategy options that extend beyond formal services and reach families through other avenues and time frames. These are frequently brainstormed by the team, with the youth and family and people representing their interpersonal and community connections being primary nominators of such supports. Finally, in order to best consider the evidence base for potential strategies or supports, it may be useful for a wraparound team or program to have access to and gain counsel from a point person who is well-informed on the evidence base.

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Family Partner Role in the Wraparound Process: Phase 2 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

2.1 d. Describe and prioritize needs/goals

The family partner helps the family to determine their priorities and express them to the team. The family partner helps the family to understand that needs not immediately addressed will be attended to once the greatest needs are taken care of. The family partner helps the family to learn the phases of the wraparound process. Attention is paid to understanding the distinction between needs, traditional services as an attempt to meet those needs, and individualized, natural supports and resources.

2.1 e. Determine goals and associated outcomes and indicators for each goal

Family Partners help the family express their views about all the goals identified in their plan of care. They encourage the family to talk about how well the goals meet their needs and priorities. The family partner makes sure the family considers how workable and realistic the plan is for them and raises any concerns they have,

The family partner helps the family to actively participate in choosing how progress on their goals will be tracked and measured. The family partners helps the family define how its members will be involved in collecting data and working with the team to understand what it means.

2.1 f. Select strategies

The family partner encourages and coaches the family to speak about how practical each proposed strategy is in the context of the family's day to day activities. The family partner also encourages the family to talk about strategies that have and have not worked for them in the past.

The family partner can support the other team members in understanding the family's perspective.

Family Partner Role in the Wraparound Process: Phase 2 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
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 *(Continued from previous page)*	*2.1 g. Assign action steps* Team assigns responsibility for undertaking action steps associated with each strategy to specific individuals and within a particular time frame.	Action steps are the separate small activities that are needed to put a strategy into place, for example, making a phone call, transporting a child, working with a family member, finding out more information, attending a support meeting, arranging an appointment. While all team members will not necessarily participate at the same level, all team members should be responsible for carrying out action steps. Care should be taken to ensure that individual team members, particularly the youth and family, are not overtaxed by the number of action steps they are assigned.
2.2. Develop crisis/ safety plan GOAL: To identify potential problems and crises, prioritize according to seriousness and likelihood of occurrence, and create an effective and well-specified crisis prevention and response plan that is consistent with the wraparound principles. A more proactive safety plan may also be created.	*2.2 a. Determine potential serious risks* Facilitator guides the team in a discussion of how to maintain the safety of all family members and things that could potentially go wrong, followed by a process of prioritization based on seriousness and likelihood of occurrence.	Past crises, and the outcomes of strategies used to manage them, are often an important source of information in current crisis/safety planning.
	2.2 b. Create crisis/safety plan In order of priority, the facilitator guides team in discussion of each serious risk identified. The discussion includes 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. Specific roles and responsibilities are created for team members. This information is documented in a written crisis plan. Some teams may also undertake steps to create a separate safety plan, which specifies all the ways in which the wraparound plan addresses potential safety issues.	One potential difficulty with this activity is the identification of a large number of crises or safety issues can mean that the crisis/safety plan "takes over" from the wraparound plan. The team thus needs to balance the need to address all risks that are deemed serious with the need to maintain focus on the larger wraparound plan as well as youth, family, and team strengths.
2.3. Complete necessary documentation and logistics	*2.3 a. Complete documentation and logistics* Facilitator guides team in setting meeting schedule and determining means of contacting team members and distributing documentation to team members.	

VIEWING INSTRUCTIONS ON PAGE 4

Family Partner Role in the Wraparound Process: Phase 2 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

2.1 g. Assign action steps

The family partner encourages the team to assign tasks to natural supports and makes sure that the family and team are likely to experience success within a reasonably short period of time. The family partner helps the family to assess which tasks it can realistically work on. Tasks the family partner takes responsibility for should relate directly to providing support to help the family accomplish tasks it has agreed to do.

2.2 a. Determine potential serious risks

The family partner contributes to crisis/safety plan development by encouraging the family to draw on their past experiences and knowledge of conditions such as environments, people, health issues, or other circumstances that could trigger a crisis or safety situation. Family partners can offer suggestions based on how they or other families have used a crisis plan.

The family partner helps the team work with the family to think about the future and what may happen that would require the use of a crisis/safety plan.

2.2 b. Create crisis/safety plan

The family partner needs to explain to the family and the team the specific responsibilities of their role and limitations imposed on them with regard to responding to crisis situations.

The family partner strongly encourages the family and the team to talk with the child or youth to understand what are likely to be the most effective strategies to avoid or de-escalate a potential crisis.

The family partner actively questions proposed responses to crisis to ensure that the crisis/safety plan includes solutions the family will use (i.e., alternatives to calling the police) and is something that the family truly feels can benefit them in the midst of a crisis and that they can follow in times of high stress.

The family partner makes sure the family has a copy of the crisis/safety plan at the end of the meeting and that they have a realistic plan for where to keep it so they can find and use it when necessary.

2.3 a. Complete documentation and logistics

The family partner reviews the initial written plan with the family to make sure that the family understands the plan, that it accurately reflects what the family has said (preferably in their own words) and what they expect from those responsible for implementing it. The family partner helps the family strategize about how to work with their team to modify anything in the plan that they are not comfortable with.

The family partner completes contact notes, individual service planning reports or other documentation according to the requirements of their employer.

The family partner helps the family use tracking procedures provided by the team and develop their own method of organizing and preserving their family's important papers and plans so they are available for future use.

If the family partner develops their own system, they need to be sure it complies with all confidentiality and record keeping requirements for personally identifiable information.

Family Partner Role in the Wraparound Process: Phase 3

*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. The activities of this phase are repeated until the team's mission is achieved and formal wraparound is no longer needed.

MAJOR GOALS	ACTIVITIES	NOTES
3.1. Implement the wraparound plan GOAL: To implement the initial plan of care, monitoring completion of action steps and strategies and their success in meeting need and achieving outcomes in a manner consistent with the wraparound principles.	*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 and following up with team members; educating providers and other system and community representatives about wraparound as needed; and identifying and obtaining necessary resources.	The level of need for educating providers and other system and community representatives about wraparound varies considerably from one community to another. Where communities are new to the type of collaboration required by wraparound, getting provider "buy in" can be very difficult and time consuming for facilitators. Agencies implementing wraparound should be aware of these demands and be prepared to devote sufficient time, resources, and support to this need.
	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.	Using the timelines associated with the action steps, the team tracks progress. When steps do not occur, teams can profit from examining the reasons why not. For example, teams may find that the person responsible needs additional support or resources to carry out the action step, or, alternatively, that different actions are necessary.
	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 and family's needs.	Evaluation should happen at regular intervals. Exactly how frequently may be determined by program policies and/or the nature of the needs/goals. The process of evaluation should also help the team maintain focus on the "big picture" defined by the team's mission: Are these strategies, by meeting needs, helping achieve the mission?
	3.1. d. Celebrate successes The facilitator encourages the team to acknowledge and celebrate successes, such as when progress has been made on action steps, when outcomes or indicators of success have been achieved, or when positive events or achievements occur.	Acknowledging success is one way of maintaining a focus on the strengths and capacity of the team and its members. Successes do not have to be "big", nor do they necessarily have to result directly from the team plan. Some teams make recognition of "what's gone right" a part of each meeting.

** Wraparound phases defined in: Walker, J. S., Bruns, E. J., & the National Wraparound Initiative Advisory Group. (2008). Phases and activities of the wraparound process. In E. J. Bruns & J. S. Walker (Eds.), *The resource guide to wraparound*. Portland, OR: National Wraparound Initiative.

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Family Partner Role in the Wraparound Process: Phase 3 (CONTINTUED)

PHASE 3: The family partner role

The family partner maintains a strategic partnership with the facilitator. Together they ensure everyone on the team is comfortable with the process and their responsibilities, encouraging team decision making in an open atmosphere where everyone, especially the family, has all the information needed to participate and make decisions.

Roles and responsibilities for all team members to implement wraparound plans should be clearly defined according to local policy. These policies and procedures should include what to do when someone fails to fulfill their responsibilities.

HOW FAMILY PARTNERS SUPPORT THE PROCESS

3.1 a. Implement action steps for each strategy

The family partner supports plan implementation by carrying through on the action steps they have agreed to take on.

The family partner mentors and coaches the family in their journey towards self-empowerment and independence. The family partner provides support as needed, to follow through on action steps without taking over. Some examples are:

- Accompanying family members to meetings with the school, court appearances, and other meetings as requested;
- Inviting family members to support groups, training and other group family activities;
- Encouraging family members to contact their care coordinator, teacher, physician, or other provider as questions or concerns emerge;
- Cheering the family on as they complete each significant stage of activity;
- Helping the family monitor implementation of their plan.

The family partner can practice communication techniques with family if necessary, and help work any concerns or barriers of the family about conversations with any team members or providers.

In some communities when specified in the wraparound crisis plan, family partners can be called upon to help avert a crisis by supporting the family's efforts to intervene before troubling behaviors escalate into a full crisis.

3.1 b. Track progress on action steps

Between meetings, the family partner checks with the family to see if they are following through on tasks and keeping track of other's actions they agreed to monitor. The family partner may provide additional support to family members and their informal supports if needed.

If the family feels things are not going well, the family partner encourages them to bring this to the attention of the team so any issues can be resolved quickly.

3.1 c. Evaluate success of strategies

The family partner encourages the team to present data in ways that make it easy for the family to understand what is being measured and what it means. The family partner also encourages the family to ask questions and provide their own views on progress in order to be an active participant with the team.

3.1. d. Celebrate successes

The family partner encourages the team to honor the family's efforts in a manner that is culturally relevant and meaningful to the family. The family partner also highlights the family's accomplishments and acknowledges what team members have done to facilitate achieving goals.

The family partner remembers to acknowledge small steps along the way as well.

Family Partner Role in the Wraparound Process: Phase 3 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
3.2. Revisit and update the plan GOAL: To use a high quality team process to ensure that the wraparound plan is continually revisited and updated to respond to the successes of initial strategies and the need for new strategies.	*3.2. a. Consider new strategies as necessary* When the team determines that strategies for meeting needs are not working, or when new needs are prioritized, the facilitator guides the team in a process of considering new strategies and action steps using the process described in activities 2.1.f and 2.1.g.	Revising of the plan takes place in the context of the needs identified in 2.1.d. Since the needs are in turn connected to the mission, the mission helps to guide evaluation and plan revisions.
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.	*3.3 a. Maintain awareness of team members' satisfaction and "buy-in"* 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, and shares this information with the team as appropriate. Facilitator welcomes and orients new team members who may be added to the team as the process unfolds.	Many teams maintain formal or informal processes for addressing team member engagement or "buy in", e.g. periodic surveys or an end-of-meeting wrap-up activity. In addition, youth and family members should be frequently consulted about their satisfaction with the team's work and whether they believe it is achieving progress toward their long-term vision, especially after major strategizing sessions. In general, however, this focus on assessing the process of teamwork should not eclipse the overall evaluation that is keyed to meeting identified needs and achieving the team mission.
	3.3 b. Address issues of team cohesiveness and trust 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).	Teams will vary in the extent to which issues of cohesiveness and trust arise. Often, difficulties in this area arise from one or more team members' perceptions that the team's work—and/or the overall mission or needs being currently addressed—is not addressing the youth and family's "real" needs. This points to the importance of careful work in deriving the needs and mission in the first place, since shared goals are essential to maintaining team cohesiveness over time.
3.4. Complete necessary documentation and logistics	*3.4 a. Complete documentation and logistics* Facilitator maintains/updates the plan and maintains and distributes meeting minutes. Team documentation should record 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.	Team documentation should be kept current and updated, and should be distributed to and/or available to all team members in a timely fashion.

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Family Partner Role in the Wraparound Process: Phase 3 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

3.2. a. Consider new strategies as necessary

The family partner goes over the plan each time they visit or speak by phone with the family. They discuss what is working and what may not be working. The family partner encourages the family to request a team meeting whenever they feel the need to make adjustments to the plan - such as when there are frequent crises.

The family partner assists and supports the family in bringing updates back to their team to identify barriers and select strategies that may work better. The family partner encourages the family to discuss their feelings and commitment to the evolving plan and to tell their team what they are experiencing and thinking.

3.3 a. Maintain awareness of team members' satisfaction and "buy-in"

The family partner acts as a collaborative advocate by being non-adversarial and coaching the family to find ways of keeping the conversation and approaches honest and respectful even in difficult moments. Because they are peers with similar experience, family partners can ease family members' fears, listening (without passing judgment) to what they are saying, and assuring them that they have a voice on their team.

The family partner may need to help the family bring their concerns, dissatisfactions, or conflicts to the surface. In such cases, the family partner explores ways to communicate with the team that the family feels are safe and can lead to resolution with other team members.

The family partner collaborates with team members to maintain their confidence with the process and help them stay engaged, use the plan, adapt it when needed, and continue to develop better ways to communicate with the family, understand and meet their needs.

3.3 b. Address issues of team cohesiveness and trust

The family partner's own behavior can help maintain the team's cohesiveness and trust. Family partners can model how to frame and reframe an issue to facilitate collaboration, being patient, and being strengths-based all through the wraparound process.

By reminding the team of the meaning of the Principles of Wraparound the family partner can help the team examine how their actions are building trust, cohesiveness, and collaboration to achieve shared goals.

The family partner encourages the family or team members to bring issues into the open where they can get supports to resolve conflicts quickly.

3.4 a. Complete documentation and logistics

The family partner reviews updates to the written plan with the family to make sure that the family understands the plan, that it accurately reflects what the family has said (preferably in their own words) and what they expect from those responsible for implementing it. The family partner helps the family strategize about how to work with their team to modify anything in the plan that they are not comfortable with.

The family partner completes contact notes, individual service planning reports or other documentation according to the requirements of their employer.

The family partner helps the family to use tracking procedures provided by the team or to develop their own method (such as a binder or folder or storage box) of organizing and preserving their family's important papers and plans. The family partner participates in evaluating the implementation of wraparound such as collecting data, interviewing families, participating in data analysis and reporting results to the team, community, families, and funding sources.

Family Partner Role in the Wraparound Process: Phase 4

*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 GOALS	ACTIVITIES	NOTES
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.	*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.	Preparation for transition begins early in the wraparound process, but intensifies as team meets needs and moves towards achieving the mission. While formal supports and services may be needed post-transition, the team is attentive to the need for developing a sustainable system of supports that is not dependent on formal wraparound. Teams may decide to continue wraparound—or a variation of wraparound—even after it is no longer being provided as a formal service.
	4.1 b. Create a post-transition crisis management plan Facilitator guides the team in creating post-wraparound crisis management plan that includes action steps, specific responsibilities, and communication protocols. Planning may include rehearsing responses to crises and creating linkage to post-wraparound crisis resources.	At this point in transition, youth and family members, together with their continuing supports, should have acquired skills and knowledge in how to manage crises. Post-transition crisis management planning should acknowledge and capitalize on this increased knowledge and strengthened support system. This activity will likely include identification of access points and entitlements for formal services that may be used following formal wraparound.
	4.1 c. Modify wraparound process to reflect transition New members may be 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.	Teams may continue to meet using a wraparound process (or other process or format) even after formal wraparound has ended. Should teamwork continue, family members and youth, or other supports, will likely take on some or all of the facilitation and coordination activities.

** Wraparound phases defined in: Walker, J. S., Bruns, E. J., & the National Wraparound Initiative Advisory Group. (2008). Phases and activities of the wraparound process. In E. J. Bruns & J. S. Walker (Eds.), *The resource guide to wraparound*. Portland, OR: National Wraparound Initiative.

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Family Partner Role in the Wraparound Process: Phase 4 (CONTINTUED)

PHASE 4: The family partner role

The family partner focuses on making sure the family is well prepared for transition, is connected to necessary supports, and has the skills and knowledge they need to feel comfortable and capable of getting help without the formal support of the wraparound team in the future.

HOW FAMILY PARTNERS SUPPORT THE PROCESS

4.1 a. Create a transition plan

The family partner helps the family to look back on their wraparound experience, identify what they have learned, review their plan, and determine if the outcomes they hoped for were achieved.

The family partner checks the family's comfort level with the cessation of formal wraparound and the time frame in which it will occur. The family partner supports the family in self-advocacy if time frames do not work for them.

The family partner talks with the family about what graduating from wraparound will mean for them and how they can manage to maintain whatever gains were made. The family partner helps the family acknowledge their own level of self empowerment and identify the specific strategies the family is able to use to advocate for their child, use natural supports and services, or get help in a crisis.

The family partner supports the creation of a post transition or after care plan in format family will be able to use. The family partner can give the family a file or binder of community and state resources and places they could in the future. . use

Some family partners are able to provide supportive contact via phone, consistent with employer policy, after formal wraparound has ended.

The family partner encourages the family to join a family-run organization and participate in family activities in the community where they can receive ongoing peer support as well as provide support to others if they are ready.

4.1 b. Create a post-transition crisis management plan

Family partners can encourage the family to call a team meeting when they need it, create their own agendas, and to facilitate their own team meetings.

The family partner makes sure the family has a crisis plan they can implement. The family partner makes sure family members know who to contact and how to get in touch with people quickly if a crisis occurs.

4.1 c. Modify wraparound process to reflect transition

At the time of transition, the family assumes responsibility for advocating for themselves. Family partner may help the family assume the facilitation of their own team post formal wraparound. The family may call on the family partner to help them refresh their skills when difficulties arise.

Family Partner Role in the Wraparound Process: Phase 4 (CONTINTUED)

MAJOR GOALS	ACTIVITIES	NOTES
4.2. Create a "commencement" GOAL: To ensure that the cessation of formal wraparound is conducted in a way that celebrates successes and frames transition proactively and positively.	*4.2 a. Document the team's work* Facilitator guides team in creating a document that describes the strengths of the youth/child, family, and team members, and lessons learned about strategies that worked well and those that did not work so well. Team participates in preparing/reviewing necessary final reports (e.g., to court or participating providers, where necessary)	This creates a package of information that can be useful in the future.
	4.2 b. Celebrate success Facilitator encourages team to create and/or participate in a culturally appropriate "commencement" celebration that is meaningful to the youth/child, family, and team, and that recognizes their accomplishments.	This activity may be considered optional. Youth/child and family should feel that they are ready to transition from formal wraparound, and it is important that "graduation" is not constructed by systems primarily as a way to get families out of services.
4.3. Follow-up with the family GOAL: To ensure that the family is continuing to experience success after wraparound and to provide support if necessary.	*4.3 a. Check in with family* Facilitator leads team in creating a procedure for checking in with the youth and family periodically 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.	The check-in procedure can be done impersonally (e.g., through questionnaires) or through contact initiated at agreed-upon intervals either by the youth or family, or by another team member.

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Phases and Activities of the Wraparound Process: Phase 4 (CONTINTUED)

HOW FAMILY PARTNERS SUPPORT THE PROCESS

4.2 a. Document the team's work

Family partners, as part of the team, ask the family what kind of commencement they would like and how they want to celebrate.

Family partners participate in planning this event to make sure this is the family's time in the sun.

The family partner makes sure the family has collected all its important plans and papers in an organized way so they have ready access to them in the future.

4.2 b. Celebrate success

The family partner encourages the family to participate in the commencement celebration. If the family does not participate, the family partner finds a way to acknowledge the family success and bring closure to their relationship.

4.3 a. Check in with family

Depending on the community policies and resources that are available to support family partner work, the family partner and family may create a plan to stay connected by phone or face-to-face meetings on an individual basis. In most communities the family partner calls the family three to four weeks after transition to see how they are doing. In some communities family partners support families long after all other formal wraparound services are finished.

The family partner's connection with family organizations in the community can give rise to opportunities for them to see and connect with wraparound graduates through newsletters, support group meetings, invitations to special events, conferences, volunteering or employment in the family movement or system of care, or joining workgroups, taskforces, advisory groups, and governing bodies.

Suggested Citation:

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